



Shipping & Mailing  
Postage Meters

# SendPro® P-Series

Mailing & Shipping Systems  
SendPro P Series 1000-3000

## Operator Guide

US English Edition  
SV63206 Rev. F  
February 20 2018

SV63206 Rev. F

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Due to our continuing program of product improvement, equipment and material specifications as well as performance features are subject to change without notice. Your mailing system may not have some of the features described in this book.

SendPro® P-Series, SendPro® P1500, SendPro® P1000, SendPro® P2000, SendPro® P3000, E-Z Seal, IntelliLink, WEIGH-ON-THE-WAY, W-O-W, Postage By Phone, INVIEW, Ascent, SendSuite Express, Purchase Power, and Pitney Bowes Supply Line are trademarks or registered trademarks of Pitney Bowes Inc. All other trademarks are trademarks or registered trademarks of the respective owners. The USPS® and Priority Mail® are registered trademarks of the United States Postal Service.

## Alerting Messages

Various messages are used throughout this guide to alert you to potentially hazardous or error causing conditions. These messages are as follows:



### Warning!

Alerts you to conditions or practices that could cause serious injury.

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**Caution:**

Alerts you to conditions or practices that could cause damage to the equipment or to the material being run.

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**Important:**

Alerts you to conditions or practices that could adversely affect equipment operation if instructions are not followed exactly.

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**Note:**

Provides a comment or explanation of the associated topic.

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# 1 - Safety

## In this section

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Safety information

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## Safety information

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### Warning:

Follow normal safety precautions for all office equipment.

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

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

- Avoid using wall outlets that are controlled by wall switches, or shared with other equipment.
- Do not route the power cord over sharp edges or trapped between furniture.
- Ensure there is no strain on the power cord where it becomes jammed between the equipment, walls or furniture.
- Do not plug headphones into the Line Out jack (Lime Green).
- Be certain the area in front of the wall receptacle into which the machine is plugged is free from obstruction.
- Before clearing a stoppage, be sure machine mechanisms come to a stop.
- When clearing a stoppage, avoid using too much force to protect against minor personal injury and damaging equipment.
- To prevent overheating, do not cover the vent openings.
- Operation of this equipment without periodic maintenance will inhibit optimum operating performance and could cause the equipment to malfunction. Contact your Pitney Bowes Customer Service Representative for required service schedule.
- Read all instructions before attempting to operate the equipment.
- Use this equipment only for its intended purpose.



**Caution:**

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



**Caution:**

In case of an ink spill, leaking ink or excessive ink accumulation, immediately disconnect the power cord from the wall plug and contact Pitney Bowes. In the USA please call 1-800 522-0020. In the USA, Customer Service Representatives are available Monday through Friday, 8:00 AM - 8:00 PM EST.

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

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**Note:**

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

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## United States

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**Note:**

This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to part 15 of the FCC Rules. These limits are designed to provide reasonable protection against interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instruction manual, may cause interference to radio communications. Operation of this equipment in a residential area is likely to cause interference in which case the user will be required to correct the interference at his own expense.

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**Caution:**

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

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

### Note for California Customers Only

The battery in this product contains perchlorate material. California requires perchlorate-containing products to be accompanied by the following notice: Perchlorate Material - special handling may apply. See: <http://www.dtsc.ca.gov/hazardouswaste/perchlorate/>

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**Warning:**

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

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### Responsible Party within the USA

Pitney Bowes  
1Elmcroft Road  
Stamford, CT 06926-0700

(800) 522-0700

## Servicing

This product is serviceable. For service inquiries in the **USA** please call 1-800 522-0020. Customer Service Representatives are available Monday through Friday, 8:00 AM - 8:00 PM ET. **Outside the USA** Contact information can also be found at [pitneybowes.com](http://pitneybowes.com)

# 2 - Getting started

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## What does this machine do?

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

The SendPro® P-Series provides a unique and easy-to-use touch screen interface where you can access all of your applications from the home screen. Each application (Mailing, Shipping, Receiving etc.) appears as a tile on the Home screen. Simply select the button within the appropriate tile to run the application. Use the full access web applications Verify Address, Track a Package, and Sign In to your account to increase you mailing efficiencies.

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

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

## What the system can measure

The system uses the WEIGH-ON-THE-WAY® (W-O-W®)/Shaped Based Rating module to process mail of varying thickness and size to determine the postage amount based on the weight and dimensions of each mail piece. Systems with WEIGH-ON-THE-WAY® (W-O-W®)/Shape Based Rating use shape based rating for Express, Priority and First-Class mail.

## What the system cannot measure

If your system does not have WEIGH-ON-THE-WAY® (W-O-W®)/Shaped Based Rating but has an attached scale, you can measure only the weight of the mail piece. The postage amount will be based on the class specified for the job you are running.

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

## WEIGH-ON-THE-WAY® (W-O-W®)/Shape Based Rating

The WEIGH-ON-THE-WAY® (W-O-W®)/Shaped Based Rating module processes mixed mail (mail of varying sizes and weights) and determines the postage amount based on the weight and dimensions of each mail piece.

## USPS requirements

Since your postage meter (Postal Security Device) is licensed by the United States Postal Service (USPS), you must follow a few basic requirements.

- Mail must have the correct date and postage amount in the postage indicium.
- Metered mail must bear the ZIP Code location of the post office where the postage meter (Postal Security Device) is registered.
- If you move to another ZIP Code location, you must update the ZIP Code. You can do this by calling Postage by Phone® at 1.800.243.7800.
- Each time you refill your postage meter (Postal Security Device) through the LAN, the Postage By Phone® Meter Payment System computer automatically performs a postal inspection. If the postage meter in your mailing machine has not detected a refill transaction at certain intervals, the message “Inspection Required” appears on the Run Mail screen and then prompts you to connect to Pitney Bowes and perform an inspection.
- The postage tape you use must meet USPS specifications.

## Postal Security Device

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

## Logging in and out of the system

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

To log in:

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

To log out:

1. Select the settings  icon in the lower right corner of the Home screen.
2. Select **Sign out**.
3. Select **OK**.

## The Home screen

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

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

## Tools

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

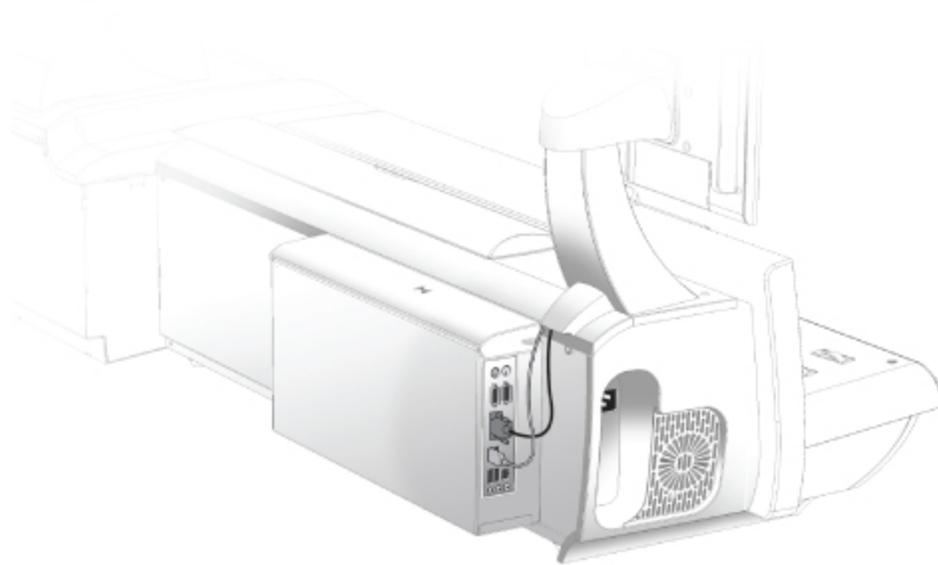
- **Verify Address** - Enter any delivery address to verify accurate Postal data, including spelling or accurate ZIP Codes. Provide reason codes for non-matches. Print shipping labels in standard USPS 4"x 6" format on bottom half of 8.5" x 11" sheet.
- **My Account**- Provides unlimited access to your account at pitneybowes.com. You can place a service call, access USPS tracking and value added services, check order status (product or service call), access service chat, and access supplies chat within the Pitney Bowes Store.
- **Discount and Presort Services** - Activating Presort Savings account gets you up to 15% of postage discount on qualifying mail, free pickup of eligible mail, delivery point Validation and Move Update processing.
- **Buy Supplies** - Provides direct access to the Pitney Bowes Supply Line where you can purchase envelopes and paper, ink and toner, office products, and supplies for your SendPro® P-Series system.
- **Track a Package** - Track your USPS, UPS, FedEx or DHL/Airborne packages. Print status directly. View map and detailed information for each carrier as information is available.
- **Tools and Apps** - Learn about all the different machines on offer from Pitney Bowes, access support, the Pitney Bowes shop and sign in to your account.

## Parts of the mailing and shipping system

Select an area of mailing and shipping system to obtain more information about it. For important safety information, refer to Safety Information.



*Touchscreen • Stylus • Postal Security Device (PSD) • Feeder  
Feed Deck • Side Guide • Power Button • Envelope Sealant Bottle  
Tape • Moistener Pad Assembly • Thickness Adjustment Knob  
Printer • Ink Cartridges • Print Heads  
Waste Ink Tray • Stacker • Tape Sealant Bottle  
Wet/Dry Tape Lever*

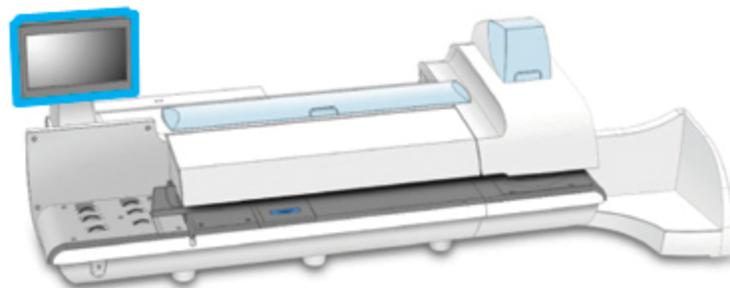


*USB Ports • LAN Port • Power Receptacle*

## **Touchscreen**

The touchscreen allows you to communicate with the mailing system and the built-in postage meter (Postal Security Device).

Your system comes equipped with a 10.2" touchscreen. An optional 15" touchscreen is also available.



## **Stylus**

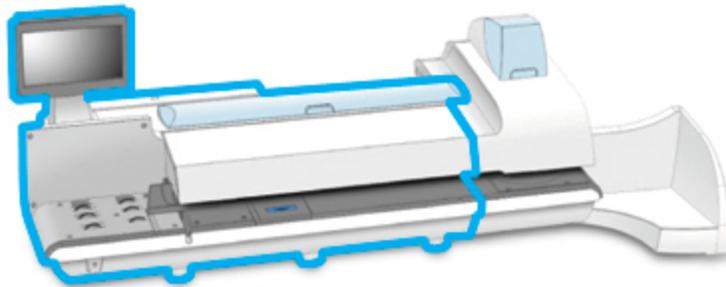
A stylus is a pen-like tool used to make selections from a touchscreen display. The stylus may be preferred by some users over “finger touch”.

The display stylus is standard with all mailing and shipping systems. It attaches to either side of the display and sits neatly in a tube holder.



## Feeder

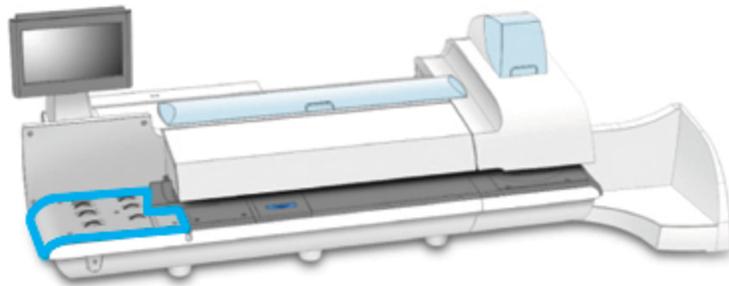
The feeder area consists of the feeder deck, side guide and thickness adjustment knob.



## Feed Deck

The feed deck is the area where you load the envelopes.

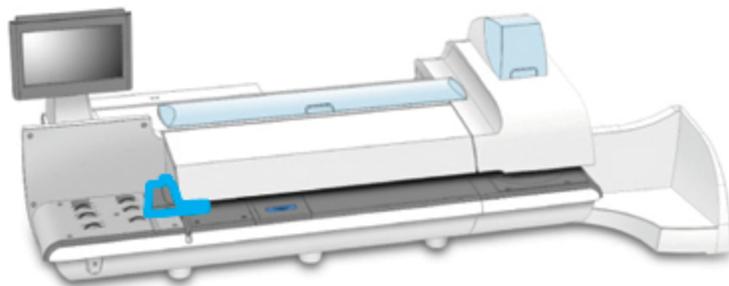
If you have a SendPro® P1500, SendPro® P2000 or SendPro® P3000 system, this feeds the envelopes to the WEIGH-ON-THE-WAY® (W-O-W®) transport deck.



### Side Guide

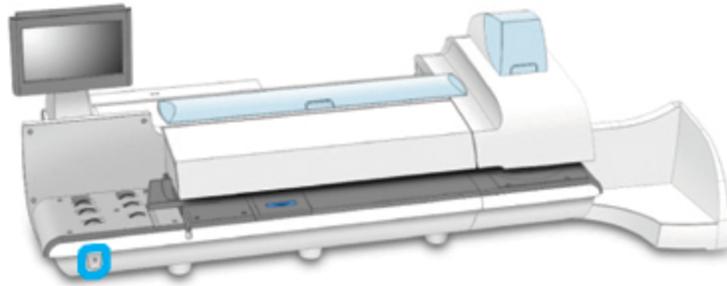
The moveable guide at the front of the feed deck is used to stabilize the envelope position when feeding it.

NOTE: The side guide is optional feature on SendPro® P3000 systems.



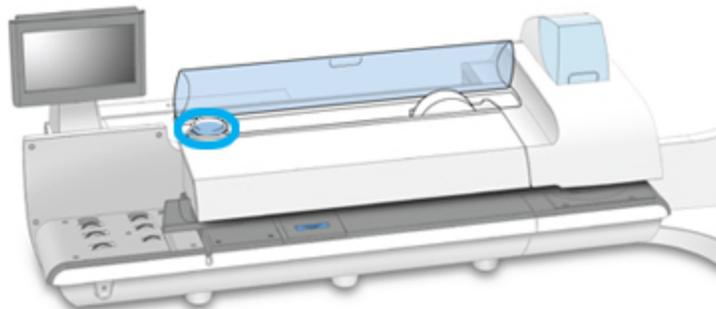
### Power Button

Turns the mailing system on and off. This is located on the lower left side of the feed deck.



### Envelope Sealant Bottle

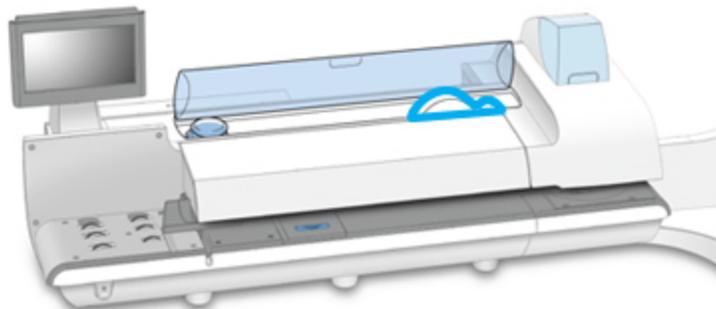
The envelope sealant bottle contains the EZ Seal® used for moistening envelopes. It is located under the main cover, on the left.



### Tape

The system uses tape to print reports and postage indicia for packages or pieces of mail that are outside the limits specified for mailing materials. SendPro® P1500, SendPro® P1000 and SendPro® P2000 systems use adhesive tape only. SendPro® P3000 systems can use either adhesive or gummed tape.

The tape is located under the supplies cover, on the right.



### **Attached Scale**

If your mailing system has WEIGH-ON-THE-WAY® (W-O-W®) (SendPro® P1500, SendPro® P2000, SendPro® P3000), the attached scale is used to weigh mail pieces that do not fit through the mailing system.

If your mailing system does not have WEIGH-ON-THE-WAY® (W-O-W®) (SendPro® P1000), the attached scale is used to weigh all mail pieces, regardless of whether they fit through the machine or not.

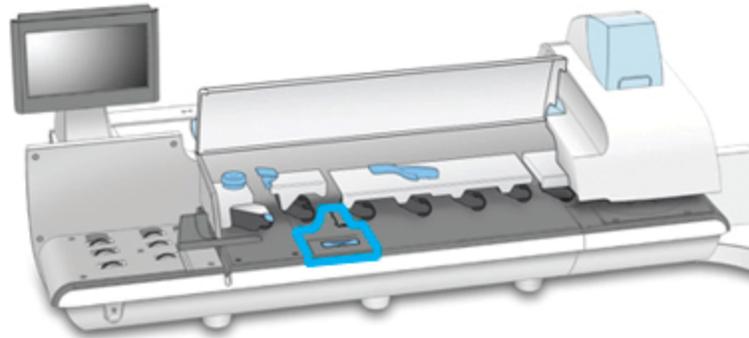
The attached scale is behind the supplies cover and to the right of the PSD cover.

### **Moistener Pad Assembly**

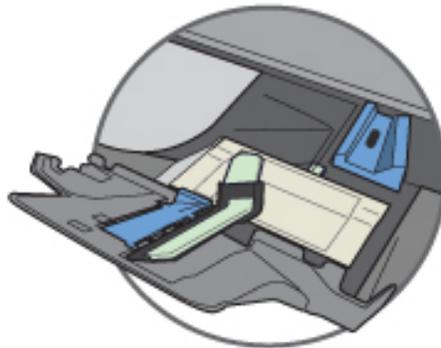
The moistener pad assembly moistens the flaps on the envelope.

NOTE: The moistener pad assembly is located beneath the moistener deck on SendPro® P3000 systems. To access it, lift the top release lever and then use the blue notch to pull on and open the moistener deck.

### **SendPro® P1500, SendPro® P1000 and SendPro® P2000 Systems**



## SendPro® P3000 Systems



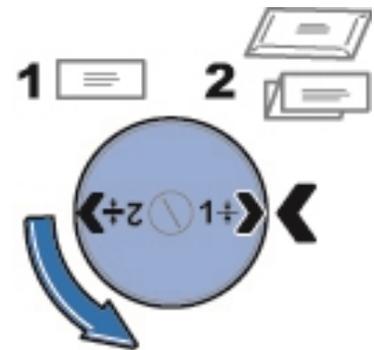
### Thickness Adjustment Knob

The thickness adjustment knob is located beneath the feeder cover. Turn this knob to adjust for the thickness of the envelopes.

To set, turn the knob until the arrow on the knob lines up with the arrow to the right as shown below. The arrow on the knob snaps into position.

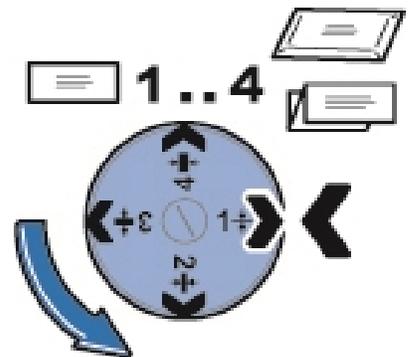
## SendPro® P1500, SendPro® P1000 and SendPro® P2000 Systems

- **Setting 1:** Use this setting for postcards mail pieces that are 0.007 inches (0.18 mm) to 0.375 inches (9.52 mm) thick.
- **Setting 2:** Use this setting for mail pieces that are greater than 0.375 inches (9.52 mm) to the maximum of 0.625 inches (15.9 mm) thick.



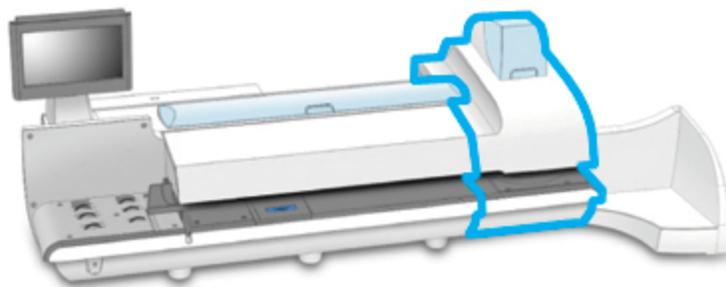
### SendPro® P3000 Systems

- **Setting 1:** Use this setting for postcards and mail pieces that are less than 0.25 inches (6.35 mm) thick.
- **Setting 2:** Use this setting for mail pieces that are greater than or equal 0.25 inches (6.35 mm) thick, but less than 0.50 inches (12.7 mm) thick.
- **Setting 3:** Use this setting for mail pieces that are greater than or equal to 0.50 inches (12.7 mm) thick, but less than 0.625 inches (15.9 mm) thick.
- **Setting 4:** Use this setting for mail pieces that are greater than or equal to 0.50 inches (12.7 mm) thick, but less than 0.625 inches (15.9 mm) thick.



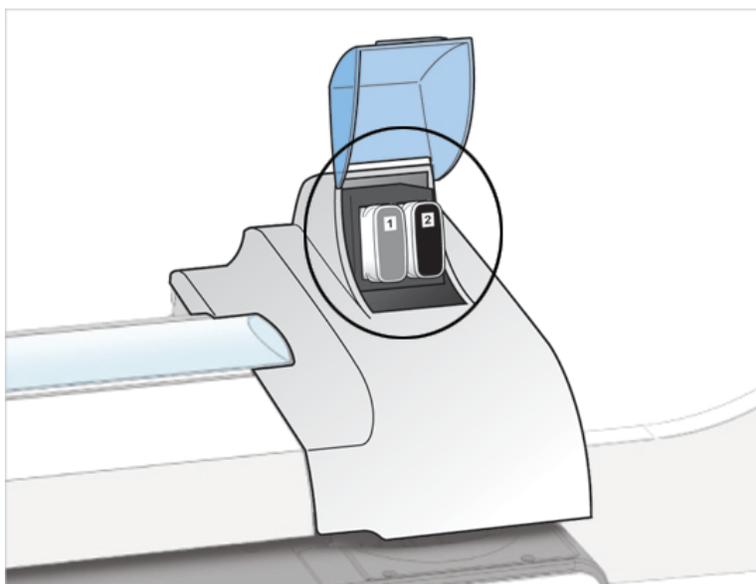
### Printer

The main components of the printer module are the ink cartridges, print heads and waste ink tray.



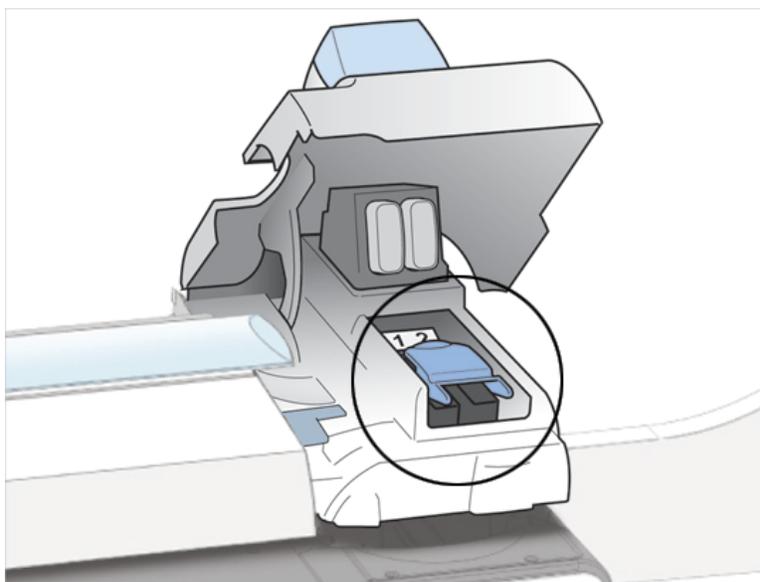
### Ink Cartridges

The ink cartridges contain the ink used to print the postal indicia, as well as any additional items (graphic ad, text message, return address, etc.) you want to appear on your mail piece.



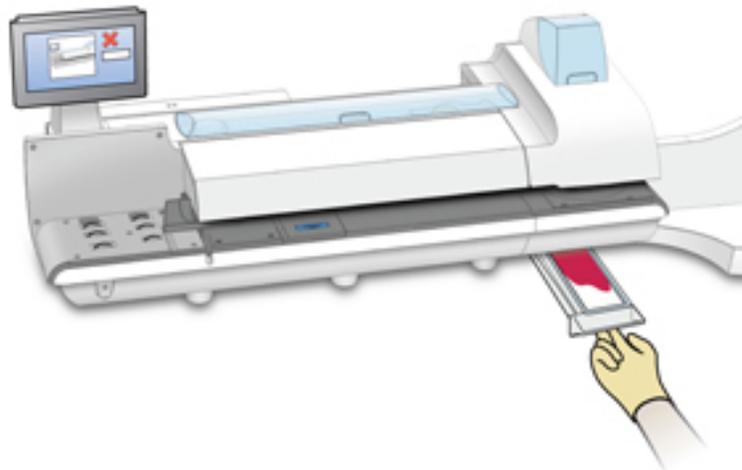
### Print Heads

The print heads produce the postage indicia.



## Waste Ink Tray

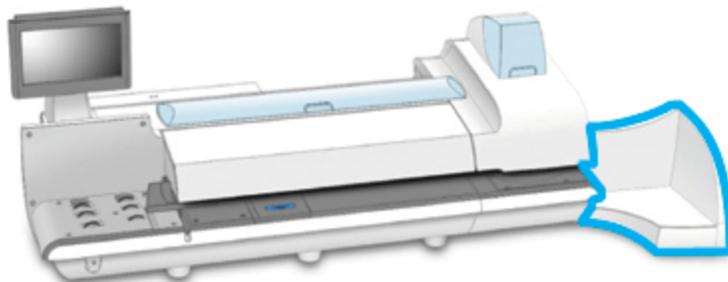
Ink is deposited in the waste ink tray during the print head cleaning process. The system will alert you when the waste tray is nearing full capacity.



## Stacker

This is where mail is deposited after the postage is applied to the piece of mail. It is located on the right side of the system. The drop stacker shown here is available with every mailing system.

An optional power stacker is also available.



## Tape Sealant Bottle

The tape sealant bottle is an optional feature for SendPro® P3000 systems. It contains the EZ Seal® used for moistening gummed tape.

The tape sealant bottle is located to the right of the printer module, behind the stacker.

### Wet/Dry Tape Lever

The wet/dry tape lever is an optional feature for SendPro® P3000 systems. Use this lever to set the type of tape you are using on your system.

The wet/dry tape lever is located to the right of the printer module, behind the stacker.



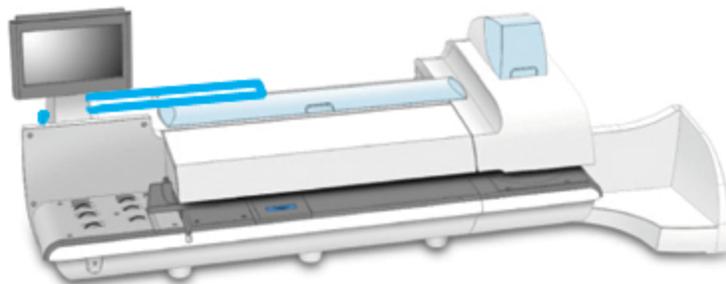
Push the lever to the right for dry tapes or pressure-sensitive tapes.



Push the lever to the left for wetting gummed tapes.

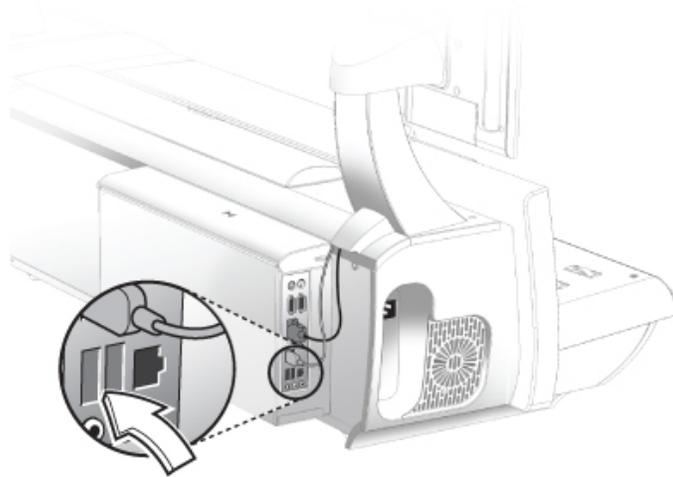
### Postal Security Device

The PSD contains the funds and performs all of the calculations necessary to print postage indicia that comply with the latest USPS standards. It is located beneath the PSD cover on the back of the mailing system.



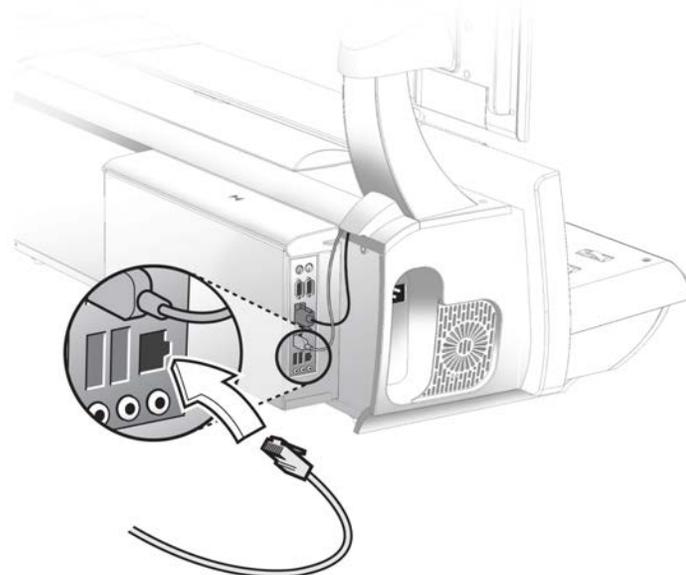
### USB Ports

Two USB ports are located on the back, lower left side of the system. These provide communications with external devices like a printer or an attached scale.



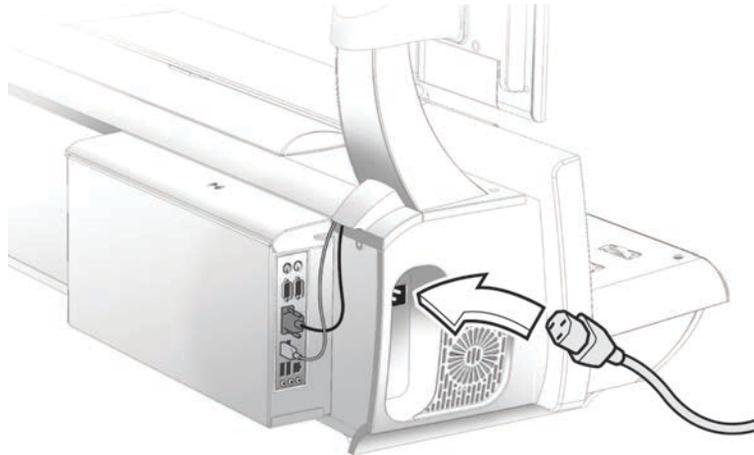
### LAN Port

The LAN port is located on the back, lower left side of the system. This port provides the mailing system with a high bandwidth Internet connection.



## Power Receptacle

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



## Manual adjustments

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

For all systems:

- Set the Thickness Adjustment Knob

For optional features:

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

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

## How to properly shut down your system

1. Select the settings  icon in the lower right corner of the Home screen.
2. Select the **Shut Down** option twice.
3. Wait until all messages clear from the screen.

## System specifications

### In this section:

---

*System Dimensions and Weights*

*Power and Compliance*

*Operating Conditions*

*Capacities, Features, and Throughput*

*Peripheral Options*

System Dimensions and Weights	
SendPro® P1000	<p><b>Length:</b> 37.5" (953 mm)</p> <ul style="list-style-type: none"><li>• With drop stacker fully extended, add 17.5" (394 mm)</li><li>• With optional power stacker fully extended, add 47.5" (1207 mm)</li><li>• With optional color printer, add 7.25" (184 mm)</li></ul> <p><b>Depth:</b> Printer cover open: 23.5" (597 mm)</p> <ul style="list-style-type: none"><li>• With optional color printer, add 1" (25.4 mm)</li></ul> <p><b>Height:</b> 24" (610 mm)</p> <ul style="list-style-type: none"><li>• With optional 15" color monitor, add 2" (51 mm)</li></ul> <p><b>Weight:</b> 110 lbs. (50 kg)</p>

System Dimensions and Weights	
<p>Connect+® 500W, SendPro® P2000</p>	<p><b>Length:</b> 52.5" (1334 mm)</p> <ul style="list-style-type: none"> <li>• With drop stacker fully extended, add 17.5" (394 mm)</li> <li>• With optional power stacker fully extended, add 47.5" (1207 mm) *</li> <li>• With optional color printer, add 7.25" (184 mm)</li> </ul> <p><b>Depth:</b> Printer cover open: 23.5" (597 mm)</p> <ul style="list-style-type: none"> <li>• With optional color printer, add 1" (25.4 mm)</li> </ul> <p><b>Height:</b> 24" (610 mm)</p> <ul style="list-style-type: none"> <li>• With optional 15" color monitor, add 2" (51 mm)</li> </ul> <p><b>Weight:</b> 150 lbs. (68 kg)</p> <p>* Power stacker not available with SendPro® P1500</p>
<p>SendPro® P3000</p>	<p><b>Length:</b> 61" (1549 mm)</p> <ul style="list-style-type: none"> <li>• With drop stacker fully extended, add 17.5" (394 mm)</li> <li>• With optional power stacker fully extended, add 47.5" (1207 mm)</li> <li>• With optional color printer, add 7.25" (184 mm)</li> <li>• With optional color printer with tape moistener, add 11.5" (292 mm)</li> </ul> <p><b>Depth:</b> Printer cover open: 23.5" (597 mm)</p> <ul style="list-style-type: none"> <li>• With optional color printer, add 1" (25.4 mm)</li> </ul> <p><b>Height:</b> 24" (610 mm)</p> <ul style="list-style-type: none"> <li>• With optional 15" color monitor, add 2" (51 mm)</li> </ul> <p><b>Weight:</b> 165lbs. (75 kg)</p>

Power and Compliance	
<p>Power</p>	<p>100-240Vac, 50/60Hz., 6.4 - 3.0 Amps</p>

Power and Compliance	
Compliance	<p>Optional ENERGY STAR®</p> <p>Refer to How to Set System Timeouts for information about the optional ENERGY STAR sleep mode.</p>

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

Capacities, Features, and Throughput	
color Touch Screen Display	<ul style="list-style-type: none"> <li>• 10.2" Standard</li> <li>• 15" Optional</li> </ul>
Feeder Type	<p>SendPro® P1000: Non W-O-W® (MSF1) Feeder</p> <p>SendPro® P2000: W-O-W® (MSF2) feeder</p> <p>SendPro® P3000: Optional W-O-W® (MSF3) feeder</p>
Feeder Deck	<ul style="list-style-type: none"> <li>• SendPro® P1000 and SendPro® P2000: Standard - Letter Mail and Flats</li> <li>• SendPro® P3000: Extra Wide Feed Deck, Letter Mail and Flats</li> </ul>
Sealer Capacity	Approximately 3900 #10 single-insert mail pieces
Sealer Type	Pump-fed pad with sealing rollers
Printer	<p>High speed dual-printing technology, at 1200 DPI (vertical)</p> <ul style="list-style-type: none"> <li>• Mono Printer Module – prints both Postal Red and Black.</li> <li>• color Printer Module – prints both Postal Red, Process color, and Black.</li> </ul>
Print Head Life	800,000 cycles for full IBI Indicia

Capacities, Features, and Throughput	
Ink Capacity (in full size USPS IBI-C indicia)	<ul style="list-style-type: none"> <li>• Small cartridge: 8K mail pieces</li> <li>• Medium cartridge: 18K mail pieces</li> <li>• Large cartridge: 45K mail pieces</li> </ul>
Ink Cartridge Life	<ul style="list-style-type: none"> <li>• Shelf life: Maximum of 24 months from date of manufacture - for monochrome and color inks</li> <li>• In use life: Maximum of 30 months from date of manufacture - includes any time on shelf before first use for monochrome and color inks</li> </ul>
Tape Method	<ul style="list-style-type: none"> <li>• Connect+® 500W, SendPro® P1000 and SendPro® P2000: Adhesive Tape</li> <li>• SendPro® P3000: Adhesive or Gummed Tape</li> </ul>
Tape	5" roll, approximately 600 indicias per roll, without graphic ads
Throughput	<p>Range of speed options available.</p> <ul style="list-style-type: none"> <li>• SendPro® P1500: 2-Speeds, 60 and 120 Letters/min</li> <li>• SendPro® P1000Non W-O-W®: 3-Speeds, 130 (Standard), 160, and 180 Letters/min</li> <li>• SendPro® P2000: Non W-O-W®: 3-Speeds, 130 (Standard), 160, and 180 Letters/min</li> <li>• SendPro® P2000:W-O-W®: 3-Speeds, 70 (Standard), 90, 110 Letters/min</li> <li>• SendPro® P3000: Non W-O-W®: 4-Speed options, 160 (Standard), 210, 260, and 300 Letters/min</li> <li>• SendPro® P3000: W-O-W®: 4-Speed options, 100 (Standard), 130, 160, and 200 Letters/min</li> </ul>
W-O-W® Weight Capacity	<p>SendPro® P1000: NA</p> <p>SendPro® P1500andSendPro® P2000: 16 ounce</p> <p>SendPro® P3000: 32 ounce</p>
Stacking	<ul style="list-style-type: none"> <li>• Drop Stacker Standard</li> <li>• Power Stacker Optional (not available onSendPro® P1500)</li> </ul>

## Capacities, Features, and Throughput

### High Speed Connectivity

- 25" LAN Cable Standard
- Wireless LAN Options
- Sprint 3G cellular available (Subscription charge applies).

## Peripheral Options

- Drop or Power Stacker Options (Power Stacker not available with SendPro® P1500)
- Compact Platform Weighing Options, 5, 10, or 15 lb. Capacity (Only 10 lb capacity available with SendPro® P1500)
- Large Platform Weighing Options: 15, 30, 70, 149 lb Capacity
- 1E20 Laser Printer
- 1E31 Brother HL-L5100DN Report Laser Printer
- Bar code scanning for Tracking Services (Confirmation Services) and Accounting
- Wireless Keyboard option
- USB Hub - 4 Open Ports
- DI900/DI950 Mail Machine Interface (Not available with the SendPro® P1500)

# 3 - Using jobs

## In this section

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## All about jobs

The SendPro® P-Series allows you to save common jobs that can be recalled and easily modified.

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

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

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

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

## About Mail Information

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

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

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

## The default job

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

The default job is special:

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

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

## Opening a job

1. You can open a job by selecting the **Open a job** tab on the Run Mail screen or by selecting the **Jobs** button in the Mailing tile on the Home screen. The Jobs screen appears with a list of jobs available on your system.
2. Select the job you want to open.
3. Select **OK**. A tab for the job opens on the Run Mail screen.

---

### Note:

Jobs can also be opened using the optional Barcode Scanner using barcodes setup with the Job Name inside.

---

To quickly move between frequently used jobs, open the jobs (up to five jobs can be open at one time) and then select the job tabs as necessary on the Run Mail screen.

## Previewing jobs

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

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

Select the job you want to preview. You can change the view of the job using the icons in the upper right corner of the screen.



**Job settings view** - Select this icon to view all of the settings for the selected job (for example, class, weighing type...), as well as an envelope preview.



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

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

## Creating a new job

You can create a job:

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

Follow the steps below to create a new job on the Run Mail screen.

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

## Creating a new job from the jobs screen

You can create a job:

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

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

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

6. Select **Save As**.
7. Type in the job name and select **OK**.

## Editing a job

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

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

## Deleting a Job

1. Select the **Jobs** button in the Mailing tile on the Home screen.
2. Select the job you want to delete.
3. Select the **Options** button and then select **Delete job**.

---

### Note:

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

---

4. Select **Yes, delete**.
5. Select **OK** when done.

## Job options

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

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

## Creating a duplicate job

1. Select the **Open a job** tab on the Run Mail screen, or select the **Jobs** button in the Mailing tile on the Home screen.
2. Select the job you want to duplicate.
3. Select **Options** then select **Duplicate job**. The system creates a duplicate job. This job appears in the Job list below the original, with the word "copy" after the name.
4. Select **OK** when done.

## Setting the default job

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

---

### Note:

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

---

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

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

### Setting the default job on the Jobs screen

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

## Renaming a job

1. Select the **Open a job** tab from within the Run Mail screen, or select the **Jobs** button in the Mailing tile on the Home screen.
2. Select the job you want to rename.
3. Select **Options** then select **Rename job**.
4. Type in the new job name.
5. Select **OK** twice when done.
6. Select the **Home** button to return to the Home screen.

## Reloading a Job

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

On the run mail screen:

1. Select the modified job.

---

**Note:**

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

---

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

## Job types

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

- Select **Seal only, no printing** if you only want to seal the envelope and do NOT want to apply postage.
- Select **Received date and time** if you want to print the date or time on incoming mail for record keeping.
- Select **Graphic ad only** if you only want to print a graphic on the envelope.
- Select **Permit** if you want to print a permit on a piece of mail.
- Select **Postal** if you want to print postage on a piece of mail.
- Select **Weigh-Rate-Count** if you want to track the weight and rate of your mail pieces as well as count mail without printing postage.

---

### Note:

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

---

## Printing a graphic or text message

You can create a job to print only non-postal elements like a graphic and/or a Text Message on a tape or envelope. If your system uses accounting, a piece count will be retained for accounting reports.

1. Select the **Options** button at the bottom of the Run Mail screen.
2. Select **Create a new job...** and then select **Graphics ad only**.
3. Select **OK**. A new job tab appears.
4. Select **Edit Envelope**.
5. Add the graphic to the job by selecting the check box of the desired graphic and select **OK**.
6. Type in the envelope or tape quantity and then select **Start** or **Tape**.
7. To save the job, select the **Save As** link at the top of the screen.
8. Type in the job name and select **OK**.

## Printing a date correction

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

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

---

### Note:

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

---

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

## Printing a postage correction

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

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

---

### Note:

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

---

4. Select **Additional** located to the right of the envelope or tape image.
5. Type in the additional postage required and select **OK**.
6. If you are printing a tape, press the **Tape** button.
7. If you are printing on an envelope, turn the piece of mail around 180 degrees so that the postal indicia is in the lower left corner.
  - a. Place the envelope on the feed deck with the flap facing down.
  - b. Press the **Start** button.
8. To save the job, select the **Save As** link at the top of the screen.
9. Type in the job name and select **OK**.

## Printing the received date and time

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

---

### Note:

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

---

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

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

## Printing a permit

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

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

## Weighing, rating and counting mail without printing postage

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

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Options** button.
3. Select **Create new job...**
4. Select **Weigh-Rate-Count**.
5. Select **OK**. The job appears in a new job tab.
6. Select the appropriate counter and then select **OK**.
  - **Total - Weigh-Rate-Count**: total number of pieces for the current job.
  - **Resettable - Weigh-Rate-Count**: the total number of pieces run since you reset the counter.
7. If necessary, add a graphic to the job.
8. Select an account.
9. If necessary, select a surcharge.
10. Select the appropriate class, carrier, or special services.
11. Select **Start** to begin feeding and counting envelopes.
12. If you want to save this job, select **Save as**.
13. Type in the job name and select **OK**.

## Sealing envelopes without printing postage

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

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

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

3. Select **Create new job...**
4. Select **Seal only, no Printing.**

---

**Note:**

Print date is off in Seal only job.

---

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

## Saving changes to a job

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

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

## Closing all jobs

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

---

### Note:

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

---

# 4 - Running mail

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## Preparing and correctly feeding the mail pieces

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

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

1. Sort the mail by envelope size.
2. Shingle envelopes (slant the stack as shown) so the bottom envelope feeds first. All envelopes in a single stack should be the same size.



3. Place the stack of mail on the feed deck. Place the envelopes with the flaps down and against the rear wall.
4. Make sure the envelopes are pushed far enough so that they cover the feed sensor located on the feed deck near the rear wall.
5. Adjust the side guide so it is close to, but not touching, the bottom edge of the envelope stack. Be sure and leave a slight clearance between the side guide and envelopes (about 1/16 inch clearance).
6. Use the thickness adjustment knob to adjust for envelope thickness.
  - For large stacks of thin mail, such as single inserts or post cards, the thin mail setting may be needed for better performance.
  - To pick a setting, turn the knob so the setting aligns with the pointer nearby.

## Reviewing the mail piece specifications

### Envelope dimensions

Minimum	Maximum
3.5 in. x 5 in. (88.9mm x 127mm) postcard size	SendPro® P1500, SendPro® P1000 and SendPro® P2000: 13 in. x 14 in. (330 mm x 356 mm)  SendPro® P3000: 15 in. x 15 in. (381 mm x 381 mm)

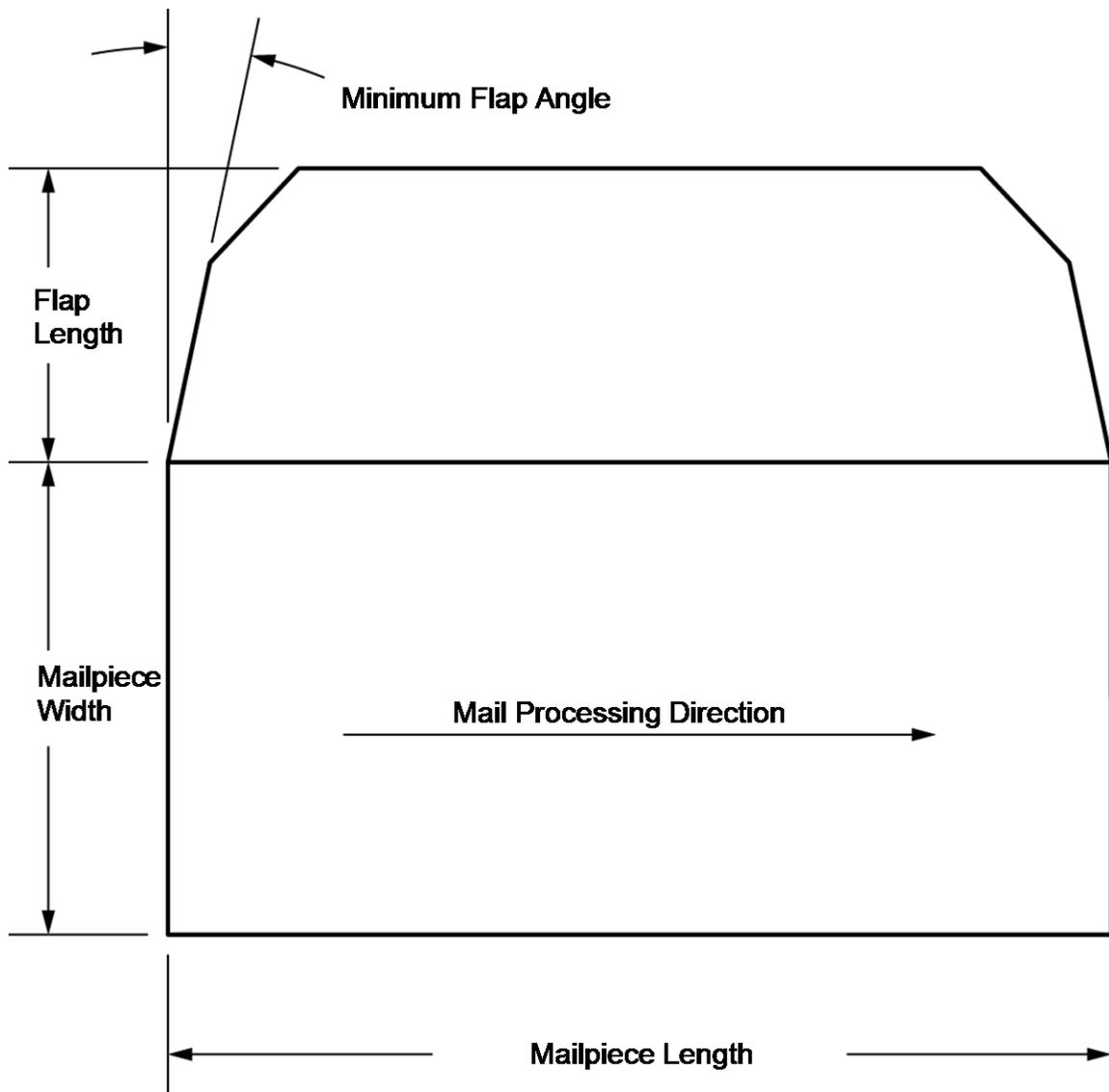
### Envelope thickness

Minimum	Maximum
SendPro® P1500, SendPro® P1000 and SendPro® P2000: 0.18 in. (0.007 mm)	SendPro® P1500, SendPro® P1000 and SendPro® P2000: 16 mm
SendPro® P3000: 0.09 in. (0.004 mm)	SendPro® P3000: 0.75 in. (19.1 mm)

### Envelope flap depth for sealing

Minimum	Maximum
1 in. (25.4 mm)	SendPro® P1500, SendPro® P1000 and SendPro® P2000: 3 in. (76.6 mm)  SendPro® P3000: 3-7/8 in. (98 mm)

- For envelopes with a flap length from 1 to 2.36 inches (25 mm to 60 mm), the minimum flap angle is 18 degrees.
- For envelopes with a flap length greater than 2.36 inches (60 mm) to the maximum flap length for the particular model, the minimum flap angle is 21 degrees.



## Acceptable envelope materials

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

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



### Caution:

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

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## Determining the correct postage method

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

**Chart A: Printing on mail**

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

**Chart B: Printing on tape**

If:	Then use this method:
You know the amount of postage needed for your mail.	Key in Postage
You do not know the weight of your piece of mail.	Attached Scale
You have several pieces of mail and do not know the required postage amounts.	Attached Scale
You know the weight.	Manual weight entry

If:	Then use this method:
Your pieces of mail vary in types, sizes, and/or weights.	Differential weighing with Auto tape printing selected

**Chart C: Processing mail without postage**

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

## Shape Based Rating

The shape of a mail piece (thickness, length, width) plays a large role in the pricing of First-Class Mail®, Express Mail, and Priority Mail postage. Since May of 2007, the USPS® has combined weight with shape to better align prices with processing costs. This is to ensure that every type of mail covers its costs, i.e., Shape Based Rating or SBR.

The ability to rate mail based on weight and shape is available on systems with the WEIGH-ON-THE-WAY® (W-O-W®)/Shaped Based Rating module.

This module has the ability to weigh and measure shape for each mail piece whilst the system is running.

## Running mail - quick start

### Note:

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

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

### Run Mail screen icons and buttons

Button, Icon, or Link	Touching or Selecting:
<p><a href="#">Tape Preview icon</a></p> 	Displays a preview of the tape to be printed.
<p><a href="#">Tape Preview image</a></p> 	Opens the Edit Envelope screen allowing you to make changes to your envelope.
<p><a href="#">Envelope Preview icon</a></p> 	Displays a preview of the envelope to be printed.

Button, Icon, or Link	Touching or Selecting:
<p data-bbox="172 386 443 415">Envelope Preview image</p> 	<p data-bbox="686 386 1398 453">Opens the Edit Envelope screen allowing you to make changes to your envelope.</p>
<p data-bbox="172 716 423 745">Postage Amount image</p> 	<p data-bbox="686 716 1052 745">Shows the current postage value.</p>
<p data-bbox="172 940 298 970">Date image</p>	<p data-bbox="686 940 1414 1008">Opens the Print Date dialog box within the Edit Envelope screen so you can modify the date printed on tape or envelope.</p>
<p data-bbox="172 1045 298 1075">Start button</p> 	<p data-bbox="686 1045 1442 1075">If the job is selected and envelopes loaded, this starts the job running.</p>
<p data-bbox="172 1270 298 1299">Tape button</p> 	<p data-bbox="686 1270 1349 1299">If the job is selected and ready, this results in running the job.</p>
<p data-bbox="172 1495 331 1524">Weighing icon</p> 	<p data-bbox="686 1495 1414 1604">The weighing icon opens the weighing method dialog screen. The shape of this icon varies depending on the weighing method for the current job.</p>

Button, Icon, or Link	Touching or Selecting:
<p data-bbox="170 386 297 413">Sealer icon</p> 	<p data-bbox="685 386 1414 451">The sealer icon opens the sealing method dialog screen. The icons shown here indicates sealing is on.</p>

## Run Mail options

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

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

## Changing or selecting the weighing method

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Weighing** icon.

3. Select the appropriate weighing method:

- WOW
- WOW, first piece only
- Attached scale
- Differential weighing
- Manual weight entry

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

4. Select **OK**.

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

## Changing the class, carrier, or special services

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. To display and select the classes and services available on your system or in your country open a postal job and select **Class** in the Mail Information list box on the Run Mail screen.
3. Select the **All classes and services** tab on the classes and services screen. When you select this tab, the last class selected is displayed. To clear the selected class and any associated services, select **Start over** within this tab.
4. Select the class from the class list box.  
**More information about selecting a class:**
  - If the class has other subclasses associated with it, it will have a plus sign (+) in front of it. Selecting the class will display the additional subclasses within the Class list box.
  - If an option button appears in front of the class, the postage amount is typically displayed after the class name.
  - Selecting the back arrow button at the top of the Class list box returns you to the previous class level. For example, if you have selected First Class > Letter, selecting Back returns you to the Class list box.
  - If the class requires additional information, it will display ellipses "... " after the name. When you select this class, you are prompted to type in the additional information.
  - When you select a class, the rating factors for that class appear in the list box on the left of the Run Mail screen. For example, for USPS rates, this may include the Weighing method. To change any of these factors, select the item in the list box.
  - If special services are available for a class, they are displayed in the Extra services list box. To select a service, touch the checkbox for the service. For example, in the US for First Class letter, you can add insurance or COD. You can also add confirmation tracking services like Delivery confirmation, E-Certified, or Certified.
  - If you select a class or service that is incompatible with a.) the weighing method, b.) the weight of a mail piece currently on the scale, c.) a weight or amount of postage entered manually, d.) or a destination, a dialog box appears and prompts you to modify the item. For example, if the weighing method is incompatible you are prompted to select a new method.
5. If the class or weight requires a ZIP or ZonePostal Code, the system prompts you to enter it.
6. If you select an International rate, the system prompts you to select the country.
7. Select any extra service or services available for the class from the Extra services list box.
8. Select **OK**.

## Selecting a ZIP or Zone

If you select a class or weight from within the Run Mail screen that requires a destination ZIP or Zone code (for example, Express Mail Parcel), the system prompts you to enter it.

Use the keyboard type in the ZIP or Zone code, then select **This is a ZIP** or **This is a Zone**.

---

### Note:

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

---

## Selecting a country

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

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

---

### Note:

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

---

## Changing the sealing method

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

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the Sealer icon.
3. Select the appropriate sealing option.
  - Select **Sealer on** to print postal and/or non-postal elements and seal the envelope.
  - Select **Sealer off** to print postal and/or non-postal elements without sealing the envelope.
  - Select **Sealing only, no Printing** to seal the envelope without printing.
4. If you selected "Sealer on" or "Sealing only, No printing" you can adjust the wetness of the sealer for this job. Select and drag the control button to adjust the wetness. 1 is the driest setting; 9 is the wettest. Use the + and - buttons for a more precise selection.

---

### Note:

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

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

## Graphics and permit-only printing

If you have a graphics and permit-only printing system, you have a fully-featured SendPro® P-Series system with a deactivated meter, which prevents postage printing. Graphics and permit-only systems can run non-postal jobs as well as utilize sealing and accounting features with no meter charges.

Although a mailing and shipping graphics and permit-only system cannot print postage, the United States Postal Service (USPS) still requires an electronic inspection of the meter. Periodically, you will receive a "Postal Inspection Required" message on your system. You can check your balance at Pitney Bowes to satisfy this requirement. Refer to Your Postage Meter for more information about postal inspections.

## Running mail

With a graphics and permit-only system you can:

- Print the correct date on a piece of mail that already has postage printed on it.
- Print the received date and time on incoming mail for record keeping.
- Print a graphic on the envelope.
- Print a permit on a piece of mail.
- Seal envelopes without printing postage.
- Count how many pieces of mail you run.
- Track the mail you run with the integrated accounting feature.

---

### Note:

- If the default job on your system is a postal job, the Low Funds warning will appear each time you open the Run Mail application. Change the default job to a job that does not print postage (e.g. Permit or Graphic ad only) to prevent this message from appearing.
  - The following message will appear on the Run Mail screen: *Alert 1 of 1: Funds Manager: PSD funds available are below monetary limit set by user in FM Refill Setup screen.* You can ignore this message on graphics and permit-only printing systems.
-

## Step-by-Step Running Mail

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

---

### Note:

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

---

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select an available job tab (or jobs) or open another job using the Open a Job tab along the top of the screen.
3. Verify the current job settings displayed in the Mail Information list box on the left side of the Run Mail screen. To change any of the settings, simply select the item, for example, select **Class** to change the class.  
**More information:**
  - To change the weighing or sealing method, select its icon on the Run Mail screen.
  - To enter a new postage amount, select the Key in Postage tab at the bottom of the screen, or select the postage amount in the Run Mail screen.
  - To change the number of envelopes or tapes to print for this job, select the Envelope or Tape link tab on the Run Mail screen.
4. To make changes to the envelope, or to the items that print on the envelope, select the **Edit envelope** link on the Run Mail tab. This opens the Edit envelope screen.
5. To change the speed at which you process mail, select **Machine Speed** from the Mail Information list box.
6. To preview the envelope, select the **View full preview** button at the bottom of the Edit envelope screen.
7. To view other possible options (for example, to print a sample mail piece) select the **Options** button at the bottom of the screen.

8. Load envelopes and press the **Start** button, or if printing to tape, press the **Tape** button.

**More information:**

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

## Possible errors when running mail

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

## Weighing methods

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

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

## Running a Manual Weight Entry job

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

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select a job that uses Manual weight entry.
3. Place the mail piece on the detached scale and note its weight.
4. Select the **Weighing** icon.
  - a. Ensure the **Manual weight entry** option is selected.
  - b. If necessary, change the weighing units.
  - c. Type in the mail piece weight.
  - d. Select **OK** to go back to the Run Mail screen.
5. Select the class of service.
6. Put the mail on the feed deck.
7. Select **Start**, or if printing to tape, select **Tape**.

## Running an Attached Scale job

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

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select a job that uses an attached scale or select the Weighing icon.
  - a. Select the **Attached scale** option.
  - b. Make sure the scale reads 0 when there are no mail pieces or any objects on the scale. If necessary, select **Zero Scale**.
  - c. Select **OK**.
3. Place the mail piece on the scale. The amount displays next to the Weighing icon.
4. If you are printing on tape, select **Tape**. If you are printing postage on the mail piece, place the piece on the feed deck and select **Start**.

## Zeroing the scale while running mail

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

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

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

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



### Caution:

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

---

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

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

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

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

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



### Caution:

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

---

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

## Running mail with different shapes and weights

For some classes of service, the Post Office bases the price of the mail piece on both the weight and the shape of the item. Systems equipped with WEIGH-ON-THE-WAY® (W-O-W®)/Shaped Based Rating can weigh and measure the mail piece as it moves through the system when a Shape Based Rating class is selected.

1. Open the appropriate job.
2. Set or verify that the weighing method is set to WEIGH-ON-THE-WAY® (W-O-W®).
3. Select **Class** in the Mail Information list box and select the option for Shape Based Rating. Select any other services required from the Extra services list box on the right of the screen.
4. Select **OK**.
5. Place the mail in the feeder.
6. Select **Start**.
7. A piece will feed into the mailing system and be weighed.
8. As it moves through the system, the thickness, length, and width of the envelope are measured.
9. Depending on the weight and measurements, the appropriate rate will be selected and the postage calculated.
10. If an item's postage cannot be calculated because of its weight or dimension, use the attached scale method and manually select the appropriate class.

---

### Note:

For a detailed description of postal services, see the USPS website.

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## Running a Differential Weighing mail job

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

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

Before using differential weighing:

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

5. The system calculates how much that piece of mail weighs by checking how much less the stack of mail weighs.
6. If the destination, ZIP code or country is needed for the piece of mail, the system will prompt you for it.
7. The print option you selected determines how postage will print.
  - If you selected the *Auto tape printing* option, the system will print a postage tape.
  - If you selected the *Auto envelope printing* option, place the piece of mail on the feed deck. The system will automatically feed the envelope and print postage.
  - If you selected the *Envelope or tape printing* option, select **Tape** to print a postage tape or place the piece of mail on the feed deck and select **Start**.
8. When the last item is removed from the scale, the system asks you if you want to print postage just in case you are removing an empty mail tray.

## Editing the Differential weighing threshold

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

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

---

### Tip:

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

---

To edit the Differential weighing threshold:

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Weighing** icon.
3. Select **Differential weighing**.
4. Select **Edit threshold**.

5. Type in the appropriate threshold.
6. Select **OK**. The system returns you to the weighing method dialog box.
7. Select **OK** to return to the Run Mail screen.

## Key in Postage

You can key in postage for any postal job.

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### Note:

You cannot save any job that uses key in postage as the default job. The default job must have a class selection so it will be automatically updated when postage rates change.

---

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. You can type in the postage amount by selecting the postage amount displayed, or by selecting the **Key in Postage** button on the bottom of the screen.
3. Type in the postage amount and select **OK**.

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### Note:

When you select Key in Postage, the Class and Weighing method are set to none. If you select a Class, the system automatically updates the postage amount appropriate to the class you chose. It also sets the weighing method to match your system configuration (for example, Attached Scale if you have a separate attached scale, or WEIGH-ON-THE-WAY® (W-O-W®), or manual entry).

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## Running mail using a barcode scanner

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

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

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

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

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### Note:

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

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## How to use the combined ZIP Code and Customer Reference Number barcode label

The combined ZIP Code and Customer Reference Number barcode label can be used as part of an Electronic Return Receipt (ERR) job.

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### Important:

The barcode scanner must be programmed if you want to scan a combined barcode label that contains the Destination ZIP Code and Customer Reference Number. Please visit [www.pb.com/barcode](http://www.pb.com/barcode) for complete programming instructions.

- 
- In order to use ERR, you should have a Bulk Proof of Delivery - Form 5053 on file with the USPS and been given a 9-digit USPS Mailer ID. You will need to enter this number when using ERR. If not, please contact your sales representative.
  - ERR is available when you use the Attached Scale or Manual Weight entry modes.

Follow the steps below to create a job that will allow you to scan the combined barcode label.

1. Place a piece of mail or package on the scale.
2. Select **Class** from the Mail Information list on the left side of the screen.
3. Select the class from the Class services list box, for example, Priority Mail Commercial.
4. Select the mail piece type, for example, Envelope or package.
5. You are prompted to type in the Destination ZIP or Zone code. Select **This is a ZIP**.
6. Select the **Electronic Certified** special service from the Extra services list on the right. As soon as you select the service, a check mark appears in front of it and you are prompted to type in the tracking number.
7. Scan the next tracking label to be used. If you have used all of the labels in a series of tracking number labels, make sure you start with the top label with the lowest last 4-digits and not the bottom label with the highest last 4-digits.
8. Select **Next**.
9. Select **Electronic Return Receipt** from the Extra services list.

10. Select **Skip** and then select **OK**.
11. Scan the combined barcode label. The Destination ZIP Code and Customer Reference Number will appear in the Mail Information list box on the left side of the screen.
12. Select the **Tape** button to print a tape. To print postage on the piece of mail, select the **Start** button. If you have accounting on your system, make sure you have selected an account for this job or you will not be able to print postage.
13. The system provides you with the option of automatically printing a receipt after every mail piece. Select the appropriate option to continue.
14. The system will ask you if you want to track another package. If you have finished processing mail with the selected class and service, select **No** to complete the job. If you want to process additional mail pieces with the selected class and service:
  - a. Select **Yes, same class & service** to continue.
  - b. You are prompted to type in the ZIP Code. Select **OK**.
  - c. Select **Clear**, and then scan the next tracking label to be used.
  - d. Select **Next**.
  - e. Scan the combined barcode label. The Destination ZIP Code and Customer Reference Number will appear in the Mail Information list box.
  - f. Repeat steps 11 - 13.
15. Once the job is complete, you are prompted to upload your records. Select **Yes, upload now**.

## Running mail with the Residual Rate Surcharge

The Residual Rate Surcharge allows you to process mail at a discounted rate while charging your customer back for the normal postage amount in the form of a surcharge.

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### Note:

The Residual Rate Surcharge is a purchasable option. Accounting is required to utilize this surcharge.

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### How Does the Residual Rate Surcharge Work?

Residual Rate Surcharge selections are made out of the Run Mail application. The surcharge can be used with any postal job. The Residual Rate Surcharge must be enabled (set to "Yes") for the job.

- Select the carrier and class necessary to obtain the discounted rate. This is the rate that will be used to process the mail.
- Select the billing class. The class you select should contain the normal postage rate.
- The Residual Rate Surcharge is the difference between the postal rate for the billing class and discounted postal rate used to process the mail.

EXAMPLE: If you processed the mail with the First Class Commercial Presorted rate (\$0.471), and selected First Class Letter as the billing class (\$0.48), the Residual Rate Surcharge would be \$0.009 per piece of mail ( $\$0.48 - \$0.471 = \$0.009$ ).

### Selecting the Residual Rate Surcharge

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Ensure that the Residual Rates Surcharge is set to **Yes**. If necessary, select **Residual Rate Surcharge** in the Mail Information list box to toggle between Yes and No.
3. Select the carrier, class and special services you want to use to process the mail.

4. Select **Billing Class** in the Mail Information list box.
  - a. Select the class of postage you want to use to bill your customer.
  - b. Select **OK**.
5. Select **Start** to begin running mail.

## Running Mail with the DI900™/DI950™ Inserting System Interface

The inserting system interface enables communication between DI900™/DI950™ FastPac® inserting systems and SendPro® P-Series systems via an Ethernet/LAN connection. When the inserting interface is in place, the inserter feeds mailpieces onto the mailing and shipping system feed deck for metering.

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### Note:

- Mail pieces must be sealed by the inserter.
  - On SendPro® P1000 systems, all mail pieces in a job must be identical.
- 
- The inserter sends start and stop signals to the mailing and shipping system. The mailing and shipping system can send error messages back to the inserter to stop feeding.
  - If the mailing and shipping system is overcome with mail, it can pause the inserter to prevent it from producing any additional mail pieces, process the mail pieces on the feeder, then signal the inserter to resume once it has caught up.
  - When the mailing system is in maintenance mode, it will pause the inserter, then signal the inserter to resume once maintenance is complete.

For more information about the DI900™/DI950™ FastPac® inserting system, refer to the documentation provided with the inserter.

## Running mail with SendSuite Xpress™ or Ascent™

When a SendPro® P-Series system is interfaced with SendSuite Xpress or Ascent, the shipping application sends a shipping job to the mailing system.

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### Note:

Accounting must be turned off and user logins must be disabled on your mailing and shipping system before SendSuite Xpress or Ascent can successfully send a shipping job.

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The Start and Tape buttons are replaced by a "Printing Remotely Controlled" message while the shipping application sends the job settings to the system. There are two types of jobs sent from the shipping system: trip and batch.

- If a trip job is sent, the mailing and shipping system displays the postage amount and changes the job to Key in Postage mode. The Start and Tape buttons remain unavailable. Running mail is remotely controlled by the shipping application and your postage is printed on a tape or tapes. Non-postal job settings (graphic ads, text messages, etc.) cannot be added to a trip job.
- If a batch job is sent, the Start and Tape buttons become available once the job is received by the mailing and shipping system. You can add or edit non-postal job settings, and print to either envelopes or tapes.

### Lock spend

If "lock spend" option is checked in SendSuite Xpress or Ascent, printing (spending) on the mailing and shipping system is locked; this means that the Start and Tape buttons are not available on the Run Mail screen when a postal job is selected. You will be able to run non-postal jobs in lock spend mode. All other system features and functions remain available. Once a job run is complete, the system will return to lock spend mode.

For more information about SendSuite Xpress or Ascent, refer to the help system provided with the application.

## Checking or changing the postage amount on the Run Mail screen

The system calculates the postage amount based on the weight of the mail piece and the class you selected for this job.

You can however override the amount of postage by selecting either the postage amount or the Key in Postage button on the bottom of the Run Mail screen and typing in a different amount. If you save this job with the manually entered postage amount, the job will no longer contain the class information so you will have to type in the postage value every time you run this job again.

It is recommended that you save each job with a class so that when the postal and carrier rates are updated, your job postage amount will also be automatically updated to reflect the new rates.

## Changing the envelope or tape quantity

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

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

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Envelope quantity** or **Tape quantity** tab on the Run Mail screen.
3. Select the envelope or tape **Quantity** box.
4. Select one of the preset quantities or enter a different number of envelopes or tapes. Select **OK**.

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### Note:

The maximum envelope quantity is 10,000. The maximum tape quantity is 100.

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

## Changing the Date

To change the format of the date or to advance the date:

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within envelope on the screen or select the date value.
3. Select the **Print Date** option on the Edit envelope screen.
4. Select the appropriate date option:
  - Print today's date
  - Today + 1
  - Select from calendar
5. Select the correct format option and then select **OK**.  
If you **Select from calendar**, a calendar appears showing several days in advance. The number of days in advance shown depends on the country. Select the appropriate date from the calendar, then select **OK**.

## Changing the machine speed

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

## Printing a sample mail piece

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

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

## Counting mail

You can count how many pieces of mail you run:

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

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

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

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



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

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

### Return address

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

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

## Changing or adding a graphic

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

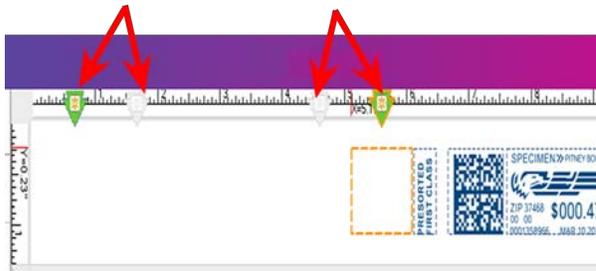
1. Ensure that the appropriate job is open and selected on the Run Mail screen
2. Select anywhere within envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Graphic Ad** option from the list box.
4. You have several options available for displaying the available graphics. Refer to Viewing available graphics for details.
5. If there is no graphic currently displayed on the envelope, select one of the available graphic ads displayed on the Edit envelope screen. A check mark appears next to the graphic you select.
6. To add a graphic, refer to Adding a graphic.
7. To change the position of the graphic, refer to Positioning a graphic/text message.
8. To remove the graphic, simply deselect it.
9. Select **OK** when you are done.
10. To verify that the envelope prints correctly, print a sample piece.

## Viewing available graphics

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

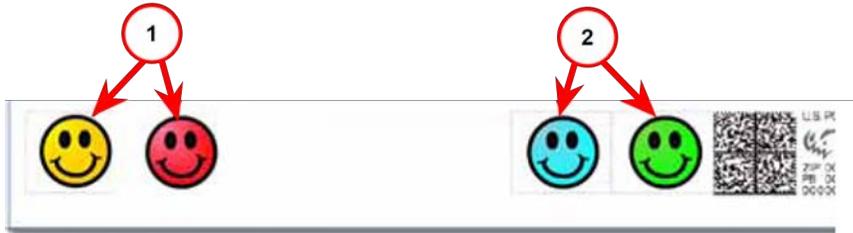
## Adding a graphic

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



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

- For a #10 envelope template you can add up to four graphics: two will be right justified (2) and two will be left justified (1).



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

## Graphic formats for MyGraphics™ Designer

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

## Positioning a graphic/message

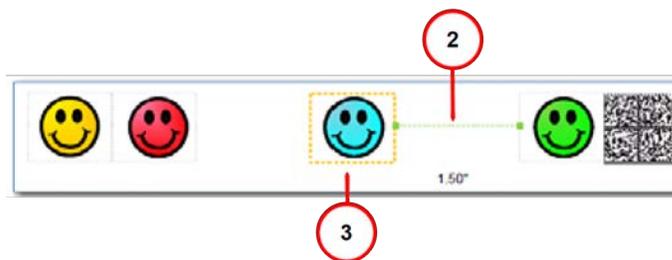
You can move a graphic horizontally within the Transpromotional zone using the Position buttons. These buttons allow you to move the graphic to the left or right. The allowed distance you can move a graphic depends on the envelope/tape size and the number of graphics already in the zone. If you attempt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

- When you select an image, a border appears around it and a dot appears on the left or right depending on whether it is left or right justified.

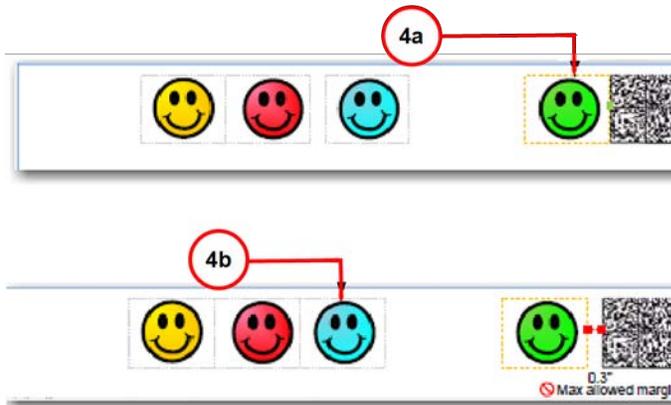
2. Select the graphic you want to move (1). For this example, we select the right justified blue graphic.



3. You can move the graphic to the left either by tapping the Margin button and entering the distance, or by tapping the left position button - a single tap moves the image 0.1 inch (2.54 mm). Press and hold for more than two seconds and the distance increments 0.5 inch (12.7 mm) every additional second. If you exceed the allowable distance, the green inter-element link (see 2 in the diagram below) turns from green to red. In the example here the right margin for the blue element is now at 1.5 inches (38.1mm). Refer to 3 in the diagram below.



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



## How markers are added or dropped

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



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

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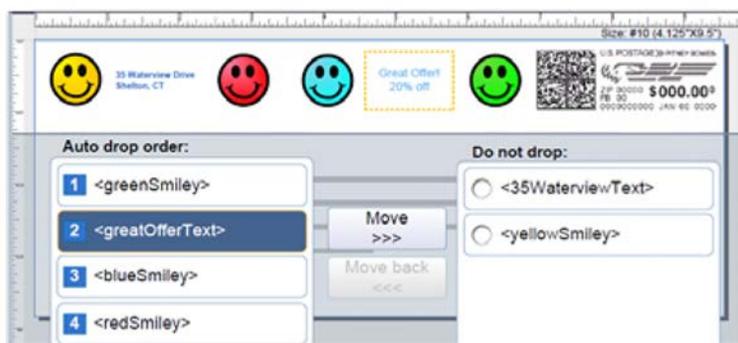
## Notes on drop order:

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

## Changing the image/message drop order

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

1. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
2. Select the **Print element drop order** option from the list box on the left of the Edit envelope screen.
3. The graphics and messages currently in the Transpromotional zone are listed in the left Auto drop order list box.



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

## MyGraphics™ Designer

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

- You must run MyGraphics™ Designer on a PC separate from your mailing system.
- The colour of a graphic printed by your mailing system is based on the printer in the system and the colour of the initial image.

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

## Changing or adding an inscription

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### Note:

Inscriptions are only available in certain countries.

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

## Postal inscriptions

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### Note:

Postal Inscriptions are only available in certain countries.

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

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

## Changing or adding a text message or return address

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Text messages and Return addresses** option from the list box on the left of the Edit envelope screen.
4. You have several options available for displaying the available graphics. Refer to Viewing Available Messages/Addresses for details.
5. If there is no message/address currently displayed on the envelope, select one of the available messages displayed on the Edit envelope screen. A check mark appears next to the message you select.
6. To add a message, refer to Adding a Message/Return Address.
7. To create a new text message or return address, or to change the font or color of the message, refer to Creating a New Message or Return Address.
8. To change the position of the message, refer to Positioning a Graphic/Text Message.
9. To remove the message/address, simply deselect it.
10. Select **OK** when you are done.
11. To verify that the envelope prints correctly, print a sample piece.

## Viewing available messages/return addresses

1. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
2. Select the **Text message and Return address** option from the list box on the left of the Edit envelope screen.
3. The messages are displayed in the order in which they have been created, with the newest appearing first.

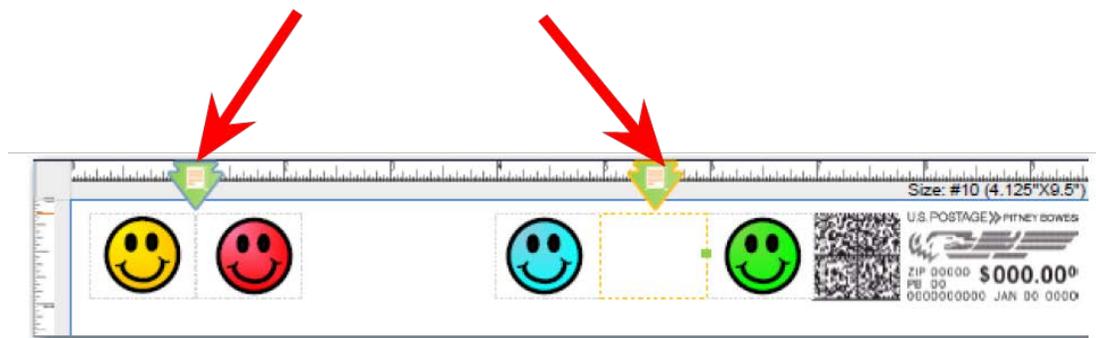
4. If your system has full color capability there will be 3 color filter buttons located directly under the image list.

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

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

## Adding a message or return address

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



2. The example shown here corresponds to a # 10 envelope and has two Text message markers. If graphic images are present, the markers are positioned between the graphic markers as shown here.
3. As with graphic markers, the text markers are left justified or right justified. The markers define the locations for return addresses or other text messages.
4. The methods for choosing a text message or a return address are the same as for graphic images. Refer to Adding a graphic.
5. To create a new message, refer to Creating a new message or return address.

## Creating a new message or return address

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

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### Note:

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

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

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

---

**Note:**

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

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## Changing envelope size

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

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

## Changing the envelope print area

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

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

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Print position** option from the list box on the left of the Edit envelope screen.
4. Set the offset value from the top edge of the envelope. The offset range from the top of the envelope is 0.24 to 0.51 inch (6 to 13 mm).
  - a. Select the + or - button once to increase/decrease the value by 0.05 inch (or 1 mm).
  - b. To continue increasing/decreasing the value hold the + or - button for at least 2 seconds. For each second you hold the button, the value increases/decreases by 0.1 inch (10mm).
5. Set the offset value from the right edge and left edge of the envelope using the same method used for setting the top edge offset. The right margin offset range is 0.06 to 1.0 inch (1.52 to 25.4 mm).

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### Note:

The offset values are dependent on the country.

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6. Select **OK** when done.

## Changing the color print quality

This option is only available if your system has color capability.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within envelope on the screen.
3. Select the color **print quality** option from the list box on the left of the Edit envelope screen.
4. Select the color ink print quality setting:
  - Good
  - Better
  - Best (slowest printing speed)
5. Select the Envelope material.
  - Regular Wove
  - Recycled
  - Glossy (requires the most drying time)

Ink print quality	Envelope material available for selection
Good	Regular Wove, Recycled. Regular Wove is selected by default.
Better	Regular Wove, Recycled. Regular Wove is selected by default.
Best	Regular Wove, Recycled, Glossy  Note that by selecting glossy, you will slow down the throughput of your system. If you have selected a faster speed that the printer can accommodate, choosing the Best option here will override that setting. Refer to Changing the Machine Speed for more information.

## What are tracking services?

The United States Post Office (USPS) provides three types of tracking services:

- Delivery Confirmation shows you when the postal carrier delivered the mail.
- Signature Confirmation shows you who signed for the mail.
- Certified Mail provides you with proof that you mailed the item.

Each of these services has its own tracking number labels. Using preprinted tracking number labels provided by Pitney Bowes, you can electronically process and submit records for the three types of USPS Confirmation Services to the Pitney Bowes Data Center.

## Postage calculation for confirmation services

Your system automatically calculates the postage amount based on the class and tracking service. You cannot change this postage value.

## Discounts for confirmation services

In many cases when you use any of these services with your mailing system and uploads the records you get a discount on the cost of the service. In some cases, like adding Electronic Delivery Confirmation to a Priority letter, you only pay the postage required for Priority mail.

## Sending your records to Pitney Bowes

Whenever you complete a job using a tracking service, the system prompts you to upload the records. In order to automatically upload your records, your system must have a full-time LAN connection.

## Tracking information on the Internet

Depending on how your system is configured, you can track your mail through your account on [www.pitneybowes.com](http://www.pitneybowes.com) You can also track your mail by going to the Postal Service's web site at [www.usps.com](http://www.usps.com).

## Delivery Confirmation

Delivery Confirmation allows you to verify the date and time of delivery of your mail pieces or, if the delivery was unsuccessful, the date and time of the delivery attempt.

The service is currently available for First Class Mail packages, Priority Mail and Package Services parcels, which include Parcel Post, Library, Media Mail and Bound Printed Matter.

You may combine Delivery Confirmation with other services such as COD, insured mail, registered mail, parcel airlift (PAL) or special handling.

There is no charge for Delivery Confirmation when you ship by Priority Mail and provide an electronic file to the Postal Service.

## Signature Confirmation

The USPS also offers a signature proof of delivery service— Signature Confirmation. This provides mailers with the text name of the recipient, along with the date, time and ZIP Code.

This service is currently available for First Class Mail packages, Priority Mail, and Package Services parcels which include Parcel Post, Library, Media Mail and Bound Printed Matter. For security purposes, digitized signatures are not publicly displayed on the web site.

You can get actual signatures from the USPS by fax or mail. This service meets the needs of mailers who require a signature for high-value shipments, or who are specifically concerned with avoiding fraud.

You may combine Signature Confirmation with special services. As an add-on service to Delivery Confirmation, there is an additional cost when you upload (send) the transaction using your mailing system. The additional cost is greater if your local Post Office handles the transaction.

## Certified Mail

Certified Mail is a service offered by the United States Postal Service® for a fee in addition to postage. Sending Certified Mail provides a delivery record that the Postal Service keeps for two years.

You can choose the Return Receipt service when you use Certified Mail. For an additional fee the Return Receipt assures that you have legal proof of receipt of the communication: The Postal Service sends the green return receipt postcard back to you, the sender. This is a very useful tool for collecting funds,

recovering checks and making legal notifications. A return receipt for Certified Mail serves as a legal document proving the date and time when the recipient took possession of the mail piece.

If you decide you want a return receipt after you mailed your certified mail piece, go to your local post office and ask for this service. The post office will give you a scanned image of the recipient's signature, along with the date of delivery. Be sure to provide the 22-digit barcode used on the mail piece.

You can eliminate the traditional "Green Card" and save money as well by using the Electronic Return Receipt (ERR) option on your system.

## Selecting a tracking service

Tracking services are available when you use the Attached Scale, or Manual Weight entry method. The following steps are based on using Priority class and the Electronic Delivery Confirmation service. Your procedure may vary slightly depending on the class and service you choose. If you are using Electronic Certified service with the Electronic Return Receipt (ERR) option, refer to How to use Electronic Return Receipt (ERR).

1. Place the piece of mail or package on the scale.
2. Select Class from the Mail Information list on the left side of the screen.
3. Select the class from the Class services list box, in this example, Priority Mail Retail.
4. Select the mail piece type, in this example, Envelope or package.
5. You are prompted to type in the Destination ZIP or Zone code. Type in the ZIP code and then select **This is a ZIP**.
6. Select the special service from the Extra services list on the right. For this example, use Electronic Delivery Confirmation. As soon as you select the service, a check mark appears in front of it and you are prompted to type in the tracking number.
  - If this is the first time you are entering a confirmation service, the field for the tracking number is blank and you need to type in the entire number. If you have a barcode scanner, you can scan in the number.
  - If you have used all of the labels in a series of tracking number labels, make sure you start with the top label with the lowest last 4-digits and not the bottom label with the highest last 4-digits.
  - If you have used the confirmation service before, the next tracking number (in the series of tracking number labels) appears, minus the last digit. You will be prompted to type in the last digit of the tracking number that is to be used on the mail piece.

7. If you have enabled tracking services prompts, the envelope that displays on the Run Mail screen refreshes once you type in the tracking number showing where you should place the tracking number label.
8. Put the label on the envelope as prompted by the system, then select **Next** and then **OK**.
9. Select the **Tape** key to print a tape. To print postage on a piece of mail, select the **Start** button.
10. If the job you are running is set up to process a single tape or mail piece, the system will ask you if you want to track another mail piece. It also provides you with the option of automatically printing a receipt after every mail piece.
11. Once the job is complete, you are prompted to upload your records. It is recommended that you upload all your records after every job.

## Electronic Return Receipt (ERR)

You can eliminate the traditional “Green Card” and save money as well by using the Electronic Return Receipt (ERR) option available on your system. This option is available when using the Electronic Certified Service.

When you select this option, all return receipt information required by the USPS for a particular mail piece is sent electronically to our Data Center.

Instead of receiving the green receipt postcard, you track your certified ERR mail piece at the Pitney Bowes or USPS web site.

In addition, if you subscribe to the service, you can enter a customer reference that links the package ID (barcode number) to the recipient. This information field allows you to identify the recipient in any way you choose: for example, by name, invoice number, unique customer ID, etc. The customer reference can be up to 14 alphanumeric characters long. An Electronic Return Receipt provides the same proof of mailing and receipt as the traditional Certified Mail Return Receipt, otherwise known as the Green Card, less the hard copy signature. The delivery tracking system stores the transaction and signature electronically should you ever need it.

Refer to *How to Use Electronic Return Receipt Service* for detailed information on using ERR.

### How to use Electronic Return Receipt (ERR)

Tracking services are available when you use the Attached Scale or Manual Weight entry method. The following steps are based on using Priority class and the Electronic Certified service with Electronic Return Receipt.

In order to use ERR, you must submit Form 5053, Bulk Proof of Delivery to the USPS. You will then be provided with a 9-digit USPS Mailer ID. You need to enter this number when using ERR. The following procedure is an example of how to use ERR.

1. Place the piece of mail or package on the scale.
2. Select Class from the Mail Information list on the left side of the screen.
3. Select the class from the Class services list box, in this example, Priority Mail Retail.
4. Select the mail piece type, in this example, Envelope or package.
5. You are prompted to type in the Destination ZIP or Zone code. Type in the ZIP code and then select **This is a ZIP**.

6. Select the Electronic Certified special service from the Extra services list on the right. As soon as you select the service, a check mark appears in front of it and you are prompted to type in the tracking number.
  - a. If this is the first time you are entering a confirmation service, the field for the tracking number is blank and you need to type in the entire number. If you have a barcode scanner, you can scan in the number.
  - b. If you have used all of the labels in a series of tracking number labels, make sure you start with the top label with the lowest last 4-digits and not the bottom label with the highest last 4-digits.
  - c. If you have used the confirmation service before, the next tracking number (in the series of tracking number labels) appears, minus the last digit. You will be prompted to type in the last digit of the tracking number that is to be used on the mail piece.
7. If you have enabled tracking services prompts, the envelope that displays on the Run Mail screen refreshes once you type in the tracking number showing where you should place the tracking number label. Apply the tracking label and select **Next**.
8. Select **Electronic Return Receipt** from the Extra services list.
9. You are prompted to type in the Customer Reference number and the 9-digit USPS® Mailer ID in their dialog boxes.
10. Once you type in the Customer Reference number and USPS Mailer ID, select **OK**.
11. Select **OK** to confirm the class and service.
12. Select the **Tape** key to print a tape. To print postage on a piece of mail, select the **Start** button. If you have Accounting on your system, make sure you have selected an account for this job or you will not be able to print a tape or envelope.
13. The system will ask you if you want to track another mail piece. It also provides you with the option of automatically printing a receipt after every mail piece.
14. Once the job is complete, you are prompted to upload your records. It is recommended that you upload all your records after every job.

## USPS® Mailer ID

This 9-digit number is required when using Electronic Return Receipt. To get this number, you need to submit Form 5053, Bulk Proof of Delivery to the USPS.

## Customer Reference Number

When using Electronic Return Receipt (ERR) your system prompts you to enter a customer reference number. You can use the customer reference to identify the mail piece recipient in any way you choose: by name, by a unique customer ID, by invoice number, and so on.

The customer reference can be up to 14 alphanumeric characters long and is included with the mail piece transaction data your system uploads. This feature greatly enhances mail piece tracking by linking the reference number to the package ID (tracking number).

## Creating a combined barcode label job

The combined barcode label was created specifically for Electronic Return Receipt (ERR) customers. You should create a job if you want to use these labels.

- In order to use ERR, you should have a Bulk Proof of Delivery - Form 5053 on file with the USPS and been given a 9-digit USPS Mailer ID. You will need to enter this number when using ERR. If not, please contact your sales representative.
- ERR is available when you use the Attached Scale or Manual Weight entry modes.

---

### Important:

Turn off all tracking services prompts, except for Print Receipt, before creating and running mail with a combined barcode label job. If necessary, the prompts can be turned on again later.

---

Follow the steps below to create a job that will allow you to scan the combined barcode label. Setting up the job in this manner will ensure you can process mail as quickly as possible.

1. Place a piece of mail or package on the scale.
2. Select **Class** from the Mail Information list on the left side of the screen.
3. Select the class from the Class services list box, for example, First Class.
4. Select the mail piece type, for example, Letter.
5. Select the **Electronic Certified** special service from the Extra services list on the right. As soon as you select the service, a check mark appears in front of it
6. You are prompted to enter a ZIP Code. Scan the combined barcode label and select **OK**.
7. Scan the next tracking label to be used.
  - If you have used all of the labels in a series of tracking number labels, make sure you start with the top label with the lowest last 4-digits and not the bottom label with the highest last 4-digits.
8. Select **Electronic Return Receipt** from the Extra services list.
9. Select **OK**.
10. Scan the combined barcode label. The Customer Reference Number will appear in the Mail Information list box on the left side of the screen.

11. Save the job.
  - a. Select **Save as**.
  - b. Enter a new job name (e.g. ERR Job) and then select **OK**.
12. Select the **Tape** button to print a tape. To print postage on the piece of mail, select the **Start** button.

---

**Note:**

If you have accounting on your system, make sure you have selected an account for this job or you will not be able to print postage.

---

13. Remove the piece of mail or package from the scale. Apply the tracking label, combined barcode label and postage tape.
14. The system provides you with the option of automatically printing a receipt after every mail piece. Select the appropriate option to continue.
15. The system will ask you if you want to track another package. Select **No** to complete the job.

## Running mail with a combined barcode label job

Follow the steps below to run mail with a job that will allow you to scan the combined barcode label.

1. Place a piece of mail or package on the scale.
2. Open the combined barcode label job (e.g. ERR Job). If the job is already open, select **Reload**.
3. Scan the next tracking label to be used.
4. Scan the combined barcode label. The Destination ZIP Code and Customer Reference Number will appear in the Mail Information list box on the left side of the screen.
5. Select the **Tape** button to print a tape. To print postage on the piece of mail, select the **Start** button.

---

### Note:

If you have accounting on your system, make sure you have selected an account for this job or you will not be able to print postage.

---

6. Remove the piece of mail or package from the scale. Apply the tracking label, combined barcode label and postage tape.

7. The system will ask you if you want to track another piece or package. If you have finished processing mail with the selected class and service, select **No** to complete the job.

If you want to process additional mail pieces with the selected class and service:

---

### Important:

Do not place the piece of mail or package on the scale until the ZIP Code prompt appears.

---

- a. Select **Yes, same class & service** to continue.
  - b. You are prompted to enter a ZIP Code. Place the piece of mail or package on the scale.
  - c. Scan the combined barcode label and select **OK**.
  - d. Scan the next tracking label to be used.
  - e. Scan the combined barcode label. The Customer Reference Number will appear in the Mail Information list box.
8. Repeat steps 5 - 7.

## Using PresortXtra services

If you already have PresortXtra, refer to Running a PresortXtra job.

### What is Presort Xtra?

Pitney Bowes PresortXtra is a convenient presort solution for low volume mailers. Pitney Bowes does the work, you keep the savings. Save between 6-15% on your First Class Mail, get free mail pickup, Delivery Point Validation and Move Update services. High-volume mailers barcode and presort their mail to save on postage. With the Pitney Bowes PresortXtra you too can benefit from the U.S. Postal Service workshare discounts, even if you don't send huge volumes of mail.

### What do I need to qualify/use PresortXtra?

First, you need to make sure you qualify for this service.

#### Qualifications for PresortXtra service

You need to make sure you have qualifying mail volumes for the PresortXtra service. You start the program by completing and signing the required program documents provided by your Pitney Bowes sales representative.

Qualifying mail volumes include:

- **Flats:** 50 or more per pickup if a letter customer. 150 or more per pickup if not a letter customer.
- **Letters:** Minimum required daily volumes of 500+ pieces per day. Single pickups of 1,000 or more per pickup

Next, verify that the necessary PresortXtra rates and inscriptions are on your SendPro® P-Seriessystem.

- Refer to Viewing the status of rates and updates.
- Check the **Rates and software** and **Features and graphics** tabs.

Third, go to Setting up PresortXtra Service jobs.

## Setting up PresortXtra service jobs

In order to use PresortXtra services, make sure the necessary PresortXtra rates and inscriptions are on your SendPro® P-Series system.

This provides instructions on how to create PresortXtra jobs for First Class Flats and Letters within the PresortXtra service.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select **Carrier** from the Postal Information section in the Mail Information list box on the left side of the screen.
3. Select **Pitney Bowes PresortXtra**.
4. Select the appropriate PresortXtra option, for example, First Class Flats. The PresortXtra options include:
  - First Class Letter
  - First Class Flats
  - Standard Mail Letter
  - Standard Mail Non Profit Letter
5. Select the appropriate Ad/service from within the Extra Services selection box on the right side of the screen. If you are using your own address verification or address cleansing process, *do not* select any Extra Service option:
  - **Return Service Requested** - Select this if you want your mail piece to be returned with the new address. There is no fee.
  - **Address Service Requested** - Select this if you want your mail pieces to be forwarded to the updated address. Written notification is provided back to the sender for \$0.50 each. After 12 months, the pieces are returned without a fee.
6. Depending on the option selected in step 5, the inscription (if applicable) appears on the envelope screen.
7. Advance the date by selecting the date on the Edit Envelope screen.
8. Select the appropriate date option, for example, **Today + 1 day**. Select **OK**. The Run Mail screen displays with the advanced date shown.
9. If you need to add a Drop Ship Authorization number, refer to Adding the Drop Ship Authorization

meter text.

10. Go to Saving the Presort Xtra job.

## Adding the Drop Ship Authorization meter text

This procedure describes how to add the Drop Ship Authorization number. This number may be required when Setting up a PresortXtra job. You get this number from the USPS. This will print on two lines as:

“D/S AUTH ##### “

“MAILED AT CITY STATE”

If you need to add a Drop Ship Authorization number, you should save it as part of your PresortXtra job.

1. Ensure that the appropriate PresortXtra job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Text Message** option from the list box on the left of the Edit envelope screen.
4. If you have already created a Drop Ship Authorization number, select it from the messages displayed on the Edit envelope screen. The message is then positioned in a default location on the envelope.
  - a. To add a new message, select the **New text message** button.
  - b. For line 1, type in the D/S number, for example: D/S AUTH 12345
  - c. For line 2, enter "Mailed at" followed by the city and state; for example, Mailed at Hartford CT.

---

### Note:

- The city and state that you are entering into the meter text should be the city and state of the Presort Services Processing facility. If the city and state is too long it can be substituted with the first three digits of the processing facility's zip code. For example, Mailed at 061. If you are not certain what processing facility this customer will be using you can contact the Mail Services Customer Center at 1-866-624-5724.
  - The maximum number of characters you can enter on a text message line is 20.
-

5. Select **OK** when complete.

For more information on creating and editing messages, refer to Changing adding a text message.

## Running a PresortXtra job

For more information on PresortXtra, refer to Using PresortXtra services.

1. Select the PresortXtra job from the job tab on the top of the Run Mail screen. If the PresortXtra job does not appear there, select the Open a Job tab along the top of the screen and select from a list of saved jobs. If you need to create a new PresortXtra job, refer to Setting Up PresortXtra Service Jobs.
2. Clear the batch count for the PresortXtra job by selecting the **Counter** button at the bottom of the Run Mail screen.
  - a. In the Postal Job counter dialog box, select **Resettable**. Resettable is the total number of pieces run and the total postage amount since you reset the counter.
  - b. Select **Reset to Zero**.
  - c. Select **OK**.

---

### Note:

Be sure and clear the batch counter between scheduled pickups.

---

3. Load envelopes and press the **Start** button, or if printing to tape, press the **Tape** button.
4. When complete, print the batch counter report:
  - a. Select the **Home** icon.
  - b. Select the **Reports** button.
  - c. Select the **Funds Reports**.
  - d. Print the funds report on a tape or envelope.

## Saving the PresortXtra job

To save the PresortXtra settings as a job:

1. Once you have selected the PresortXtra settings, select **Save As** on the top of the Run Mail screen. You are prompted to *Save as job name*.
2. Select the keyboard icon and type in the job name. You can enter up to 16 alphanumeric characters.
3. Select **OK**. The new job appears as a tab at the top of the Run Mail screen.
4. To save other PresortXtra jobs, select **Carrier** again as described in Setting up the PresortXtra job and repeat the process.
5. Run a sample mail piece to verify that the proper inscription appears on the envelope or tape.
6. To upload the single mail piece data, go to the Home screen and select the **Settings** button. The Settings screen displays.
  - a. Select **System** from the list on the left side of the screen.
  - b. Select **Postal Information Upload**.
  - c. Select **Upload postal information now**.
7. Fax the sample mail piece to the Mail Services Customer Center at 203-617-3939 and call them at 1-866-624-5724 to let them know that the setup is complete.
8. Go to Running a PresortXtra job.

# 5 - SendPro® Shipping

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## What is SendPro® Shipping?

You can use your SendPro® P-Series machine to access the SendPro® shipping application.

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

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

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

## Getting started with SendPro® shipping

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

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

To begin using SendPro® shipping refer to Creating a shipping label.

## Adding postage to your SendPro® Shipping account

Your USPS postage balance is displayed in the upper right area of the *Choose a Recipient* screen, just below the main navigation bar. You access the *Choose a Recipient* screen by creating a new USPS label from the *Home* screen, or by selecting **USPS** from the **Print** menu.

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### Note:

For UPS and FedEx carriers your postage costs are billed directly to your UPS or FedEx account.

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To refill the postage in SendPro® Shipping:

1. Select **Print Shipping Label** in the Shipping tile on the Home screen.
2. Select the **USPS** logo.
3. Select the + sign next to your postage balance. The *Refill Add Postage* dialog box will appear.

---

### Note:

Whenever you refill postage, the payment method and the last 4 digits of the account number are displayed in the *Refill Add Postage* dialog box.

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4. Select the amount of postage you want to purchase for this refill. You can refill using a preset amount or click the **Custom** button to enter your own amount. The minimum you can add is \$10.00; the maximum depends on your postage balance, which has a limit of \$500.00.
5. If you have enabled Cost Accounts, you must assign the postage refill to an account.

6. Click the **Refill Add Postage** button.

---

### Notes:

If you get a message "we couldn't process your payment" and you're using a Reserve Account or Purchase Power for payment, you may not have sufficient funds available. To resolve this error, contact customer support.

If you are using a credit card as a payment method, you will be charged 3.5% on the amount you enter for the refill.

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## Tracking a shipment in SendPro®

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

1. View all tracking numbers:
  - a. Select the **History** button in the Shipping tile on the Home screen.
  - b. Locate the tracking number in the list of shipments.

---

### Note:

Each line in the list represents a single shipment and includes the Status field. This tells you if the shipment's label has been printed, or if it's in transit or has been delivered.

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- c. To view the tracking event details for that shipment, click on the **View** link or > arrow in the left of the column list, next to the shipment's date, to reveal the shipment's details.
2. Search for a tracking number:
  - a. Look for the search box on the History screen.
  - b. Enter the tracking number in the field.
  - c. The system automatically narrows down the list of shipments based on the information you provide.

## Adding an address to the Address Book

1. Select the **Address Book** button in the Shipping tile on the Home screen.
2. Select either the **Recipient** or **Sender** tab (whichever is appropriate).
3. Click on the **+Add New** button.
4. At the Add Contact screen, click the **Add one address** button.
5. Enter the details for the new address in the fields provided on the screen.
6. Click **Save** when done. You may be prompted to verify the address.
7. The new address is added to your list of addresses.

## Changing the sender's address

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

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

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

## Creating a label from an address

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

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

## Editing or deleting an address

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

## Verifying a USPS address

Whenever you enter a US address in SendPro, you'll be prompted to verify it by clicking a **Confirm Address** when you click the down arrow button. You'll encounter address verification when entering recipient or sender address information, creating a shipping label, or adding an address to the Address Book.

- The USPS keeps a database of valid mailing addresses. By clicking **Confirm Address** you can confirm that the USPS recognizes and can deliver to that address.
- If USPS doesn't recognize a recipient's address then you'll need to edit it until it can be validated. Then you can print your label.

If SendPro finds a close match in the USPS database, you'll have the option of using that instead of the address you entered, editing your entry, or using the address you entered as is. To accept the USPS-verified address, click the **Use Verified** button when prompted. SendPro will save any edits you made to the address you entered.

## Voiding a shipping label

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

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

To cancel after printing:

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

To cancel the label from the *History* screen:

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

## Getting a USPS shipping label refund

You can request a refund to 30 days from the date on which you first printed a shipping label. When you request a refund for USPS shipping labels, the postage amount is credited to your postage balance. The refund process can take up to 20 days because USPS wants to see if it can detect your shipment in its mailstream before crediting your account.

You can request a refund from the shipping label's record on the *History* screen.

---

### NOTE:

For UPS and FedEx, when you cancel a shipping label the postage won't be credited. Instead, it will simply not be applied to your invoice from UPS/FedEx. Refer to [How to cancel a shipping label](#).

---

To request a USPS refund for a label you've just printed:

1. On the *Carrier* screen you will see a confirmation that the label has been printed.
2. Click on the **Request Refund** link.
3. You'll see a *Request Refund* dialog box with some conditions. If you agree to them, check the checkbox.
4. Click **Continue** to process your refund request.

To request a USPS refund from the *History* screen:

1. From the **History** menu, choose **Request a Refund**. Select the **History** button on the Home screen.
2. This opens the *History* screen with the tab for *Shipments* selected and displaying all of the shipments that are eligible for a refund.
3. Find your label in the list or by using the search box (refer to [How to search for a shipment in SendPro](#)).
4. Click the > arrow in the left of the column list, next to the shipment's date, to reveal the shipment's details.
5. Select **Request Refund**.

6. You'll see a *Request Refund* dialog box with some conditions. If you agree to them, check the checkbox.
7. Click the **Continue** button to process the refund request.

To check the status of your refund, refer to [How to check on a label's refund status](#).

## Managing your email notifications

---

### Important:

When using email notifications, make sure the recipient/sender address includes a valid email address. Refer to [How to add an address to the Address Book](#).

---

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

The email notification feature can be enabled/disabled via the SendPro®Online Shipping Solution. Please access the SendPro® web application on your computer.

## Viewing your USPS account information in SendPro® P Series

The method you use to pay for postage is set up when you purchase the SendPro® P Series application. To view the payment method for your USPS account:

1. Select the **Print Shipping Label** button on the Shipping tile on the Home screen.
2. Select the USPS carrier.
3. Select the + sign next to your postage balance in the top right corner of the *Recipient* screen.
4. The payment method and the last 4 digits of the account number are displayed in the *Add Postage* dialog box.

## Setting up a UPS account

This procedure describes how to set up a UPS carrier account.

1. Select the **Print Shipping Label** button on the *Home* screen. Select the UPS carrier. Select the UPS carrier button on the *Home* screen. This opens the *Add UPS Account* screen.
  - If you do not have a UPS account, Select the **Create New UPS Account** button. This provides you with a link to the UPS web site where you can sign up and get a UPS account number.
  - If you already have a UPS account, Select the **Enter My UPS Account** button.
2. Enter your 6-digit UPS account number.
3. Click the **Account Type** and select the appropriate type from the drop-down menu.
4. Enter your recent invoice information, or enter the name and address used to set up your UPS account:
  - Use your most recent invoice number if you have it. If you've shipped with UPS in the past 90 days, UPS will have issued you an invoice and requires that you input that information here. You or the account holder in your organization should be able to download it from UPS.com.
  - If you don't have a recent invoice, check the check box for **I don't have a recent invoice**.
5. Enter your name and address **EXACTLY** as they appear on your UPS account.

---

### Note:

For security reasons, the information you enter when adding UPS as a carrier account for your SendPro® system must match your UPS account's information exactly. You get 3 attempts to enter this information correctly before you are locked out of your UPS account for 24 hours. After that, you can try again. To see your UPS account information, refer to your most recent invoice or sign in to your UPS account and refer to your account's name and address information as you enter it into SendPro.

---

6. To continue, check the check mark for **I accept the UPS Technology Agreement**.
7. Select the **Add Carrier** button. You will know your UPS account has been added to SendPro® when you see the message, "Settings have been saved successfully".

## Setting up a FedEx account

This procedure describes how to set up a FedEx carrier account.

1. Select the **Print Shipping Label** button on the *Home* screen. Select the FedEx carrier. Select the FedEx carrier button on the *Home* screen. This opens the *Add FedEx Account* screen.
  - If you do not have a FedEx account, Select the **Create New FedEx Account** button. This provides you with a link to the FedEx web site where you can sign up and get a FedEx account number.
  - If you already have a FedEx account, Select the **Enter My FedEx Account** button.
2. Enter your 9-digit FedEx account number.
3. Enter your name and address in the fields provided exactly as they appear on your FedEx billing statement.

---

### Note:

When you open the *Add FedEx Account* screen, the name and address will be the one you used when signing up for SendPro. You need to replace this with your FedEx name and address.

---

- To use a contact name and address different from your FedEx billing address, check the check mark for **My contact name or address....** A blank name and address form is then provided for you to enter this information.
  - To continue, check the check mark for **Accept the FedEx End-User License Agreement.**
4. Select the **Add Carrier** button. You will know your FedEx account has been added to SendPro® when you see the message, "Settings have been saved successfully".

## Measuring your shipment dimensions in SendPro®

When you create a shipping label you select the type of envelope or package for your shipment using the *Enter Packaging Details* screen. Refer to *How to Creating a shipping label in SendPro* for more information.

- Each carrier provides a list of carrier-specific packages (box, envelope, mailing tube, or unpackaged) from which you can choose. For detailed information on size and weight restrictions, position the cursor over the package.
- You can also choose to use your own envelopes or boxes in which case you are prompted to select the package type (box, envelope, or irregular packaging) and enter the dimensions and the weight. Refer to [How to use your own packaging for shipments in SendPro®](#).

## Adding a shipment memo in SendPro®

Once you enter all the information required to create your UPS or FedEx shipping label (recipient address, packaging information, carrier services - refer to How to create a shipping label in SendPro) you can enter up to a 50-character note in the *Memo* field within the *Label Options* screen. This note will print on the shipping label and also will appear in the History file for the shipping label. Refer to How to print a shipping label in SendPro for more information.

## Weighing your shipment with a scale in SendPro®

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

Depending on the carrier you may be prompted to enter the weight of your shipment. If you have an attached USB scale, place the package on your scale and click the scale button.



The weight will appear in the *Weight* field. Refer to [How to create a shipping label](#) in SendPro® for more information.

## Using your own packaging for shipments

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



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

For detailed information on size and weight restrictions, contact your carrier.

For USPS: <https://www.usps.com/>

For UPS: <https://www.ups.com/>

For FedEx: <https://www.fedex.com/>

## Creating a shipping label

You can create a USPS, UPS or FedEx shipping label from the **Print Shipping Label** button or from within the Address Book (refer to [How to create a shipping label from an address](#)).

This procedure walks you through the process of creating the label starting from the *Recipient* screen. It breaks the process of selecting a recipient, providing shipping details and choosing carrier-specific services into several steps. Once you provide the information in one section, select the down arrow on the right side of the screen to proceed to the next section. To go back to a previous screen, select the up arrow on the right side of the screen. As you create the label, your progress displays along the bottom of the screen.

The overall process for creating and printing a label is the same for all carriers, although you will notice some variation in packaging sizes and services offered.

1. Select the **Print Shipping Label** button. Select the appropriate carrier. This opens the *Recipient* screen.
2. If you are using Cost Accounts you need to assign a cost account for this label. Select the down arrow in the *Cost Account* section at the top of the screen and choose the account. For more information on setting up Cost Accounts, refer to [How to enable cost accounts](#).
3. Enter the recipient's address using one of two methods:
  - Type in the recipient's address in the fields provided. SendPro® supports "typeahead" so that if the name or part of the name is already in the address book, it will display the matching address(es).
  - Select the **Choose from Address Book** icon . You can scroll through the list of addresses or select a search option (search by full name, street etc.) by selecting the down arrow in front of the search field. If you select an international address, the *State* and *ZIP Code* fields change to *Province* and *Postal Code*.
4. To automatically email the tracking number to recipients or senders (or both) when you print the shipping label, check the check box in front of **Email the tracking number**. For information on the setting up the automatic email notification options, refer to [How to manage email notifications](#).
  - Enter the email address in the field provided. To add more than one email, press the **Enter** key after each address. The email address is labeled as either sender or recipient.
5. Select the down arrow on the right side of the screen to continue and to verify the USPS address. This ensures your address is recognized by the USPS. For more information, refer to [How to verify a USPS address](#).

6. At the *Package Type* screen, enter the shipping package information. Select **Continue** and enter the shipping package information in the *Choose Your Packaging* screen.
  - Each carrier provides a list of carrier-specific packages (flat-rate envelopes or boxes) from which you can choose. To view the dimensions and maximum allowable weight for each of these packages, position the cursor over the package.
  - You can also choose to use your own envelopes or boxes in which case you are prompted to select the package type (box, envelope, or irregular packaging) and enter the dimensions and the weight. Refer to [How to use your own packaging for shipments in SendPro®](#).
7. If you are creating an international or military shipping label, you will be prompted to enter the required customs information in the *Provide Customs Details* screen. You will need to identify the type of items (for example, gifts, documents, returned goods etc.) and provide detailed descriptions of all the items contained in your shipment. This includes where it's made, the cost, weight and total value. The exact requirements will depend on the carrier.
8. At the *Services* screen, select the carrier shipping service. Select **Continue**. Use the *Choose Your Service* screen to select the carrier shipping service. Depending on the package type and the carrier service, you can also select a variety of additional special services.
  - When you finish selecting the shipping services and options, the total cost for the shipping label is displayed at the bottom of the screen.
  - For the USPS carrier, if the total cost of the label exceeds your available postage funds, the *Refill Add Postage* screen displays so that you can add more funds to your account. Refer to [How to add postage to SendPro®](#)
9. Select the **Print** button at the bottom of the screen directly under the *Total Cost*. This opens the *Label Options* screen which allows you to define how you want to print the label. Refer to [How to print a shipping label](#).
  - Depending on the service, you may be prompted to enter the Sender and Recipient's phone number. Enter the numbers and click **Continue** to open the *Label Options* screen.
10. To create a new label, repeat these steps.

## Creating a USPS return label

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### Note:

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

---

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

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

To reprint from the *History* screen:

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

## Printing a shipping label

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

- To print a receipt along with the label, select the check box for **Print a receipt with the shipping label**. You can select this option only if you are printing on 8 ½" x 11" printers.
- Select the down arrow in the **Choose Format** field and then select either 4" x 6" roll or 8.5" x 11" paper. Ensure the correct size label is selected. Once the shipping label is printed, the size cannot be changed.
- Use the magnifier to zoom and see the address as it will actually print on the label.
- You can select **Print Sample** to ensure the label aligns correctly when you print. When the sample label appears in a new tab, print it and then check the alignment.
- To add a note about this shipment, enter the information in the Memo field. You can enter up to 50 characters. It will be available in your history file for all carriers. Refer to [Search for a shipment in SendPro](#) to view the information stored in your history file.

Print the label:

Select the **Print** button. Once the shipping label prints, the message "Label Completed" along with the total cost displays on the Carrier screen.

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

- Reprint this USPS Label - refer to [Reprinting a USPS shipping label](#).
- Reprint this FedEx or UPS Label - refer to [Reprinting a FedEx or UPS label](#).
- Create a Return Label (USPS Only) - Refer to [Creating a USPS return label](#).
- Void a USPS, FedEx or UPS Label - Refer to [Voiding a shipping label](#).

## Setting up shipping label printing defaults

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

On this screen, check or uncheck the checkboxes to:

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

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

The *Printing Defaults* screen also allows you to enable the printing of USPS SCAN forms. Refer to How to print a USPS SCAN form in SendPro® for more information.

## Reprinting a USPS shipping label

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### Note:

You can reprint a shipping label once, after printing it the first time, or from the shipping label's record on the *History* screen. You have up to 24 hours from the initial printing to reprint.

---

To reprint a shipping label you've just printed:

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

To reprint from the *History* screen:

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

## Reprinting a FedEx or UPS shipping label

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### Note:

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

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

---

To reprint a shipping label you've just printed:

1. On the *Carrier* screen you will see the message "Label Completed" .
2. Click the **Reprint This Label** link next to the "Label Completed" message.
3. Click the **Print** button.

To reprint from the *History* screen:

1. Select the **History** button in the Shipping tile on the Home screen.
2. This opens the *History* screen displaying all of your recent shipments.
3. Find your label in the list or by using the search box (refer to How to search for a shipment in SendPro).
4. To reveal the shipment's details click the **View** link or the > arrow in the left of the column list, next to the shipment's date. You can also open the shipment's details by clicking on the **View** link in the *Status* column.
5. Click the **Reprint** button.
6. Click the **Print** button.

## Printing a FedEx manifest

Use the SendPro shipping web application from your PC to print a FedEx manifest. Use the same login and password you use for SendPro shipping on your SendPro® P-Series machine.

The FedEx Manifest is available from the Print menu on the SendPro Home page.

## Checking on a label's refund status

To check the status of a shipping label refund request:

1. From the Home screen select the **History** button.menu, choose **Request a Refund**.
2. This opens the *History* screen with the tab for *Shipments* selected and displaying recent shipments that are eligible for a refund.
3. Select the **Refunds** tab. You'll see a list of shipments for which you've already requested a refund.
4. Find your label in the list or by using the search box (refer to How to search for a shipment in SendPro). Check its refund status in the *Status* column. For USPS labels, its status will start as "Refund Requested". When the refund is approved, the status changes to "Refund Approved". A status of "Refund Denied" means that the USPS has detected your shipment in its mailstream and can no longer provide a refund.
5. The amount and date of your label's refund credit is shown in the Refund tab's rightmost columns.

## Where is postage being spent in SendPro®

You can see where you're spending money on postage by viewing your History file.

1. From the Home screen select the **History** button. menu, select **Shipping & Postage History** or click **View all** next to *Track Your Packages* on the *Home* screen.
2. Select the tab for *Postage*. The *Postage* screen provides a line-item summary of all the times you have purchased postage for your shipping labels.
  - The purchases are listed by date, the latest date appearing first in the list. The **Date** column corresponds to the date you purchased the postage.
  - To change between ascending and descending sorting for an item in the postage purchased list, click on the appropriate column title. For example, to change sorting for Cost Accounts, click on the **Cost Account** column title.
3. Click the > arrow in the left of the column list to reveal complete details for a particular purchase (recipient's and sender's address, mail class and special services, Cost Account, total cost, etc).

## Searching for a shipment in SendPro®

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

## Filing an insurance claim

You can file an insurance claim using the SendPro®Online Shipping Solution. Please contact your Pitney Bowes office for further advice.

## Enabling Cost Accounts

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

The Cost Accounts feature is enabled via the SendPro® Online Shipping Solution. Please access the SendPro® web application on your computer where you can also view Cost Accounts information.

# 6 - Ship a Package

## In this section

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## What is Ship a Package

Ship a Package is an application that resides on your SendPro® P-Series system. You access Ship a Package by clicking on the Ship a Package application button located next to the Run Mail button on the Home screen.

Ship a Package allows you to print IMpb compliant (2D barcode) shipping labels directly from your Connect+ system, helping you to save on USPS Parcel rates and to simplify shipping from the mail room.

The 4" x 6" shipping labels are printed using either a Brother Label (QL1050) high volume printer or a Datamax O'Neill w1110 low volume label printer. For international labels, you can use an 8.5" x 11" printer; either the Pitney Bowes 1E05/1E08/1E20 models or Brother HL5450DN (1E30) Report Laser Printer. All printers are connected using a USB hub

You can use the shipping labels for Priority Mail boxes, Priority Mail envelopes, your own boxes or large envelopes.

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### Note:

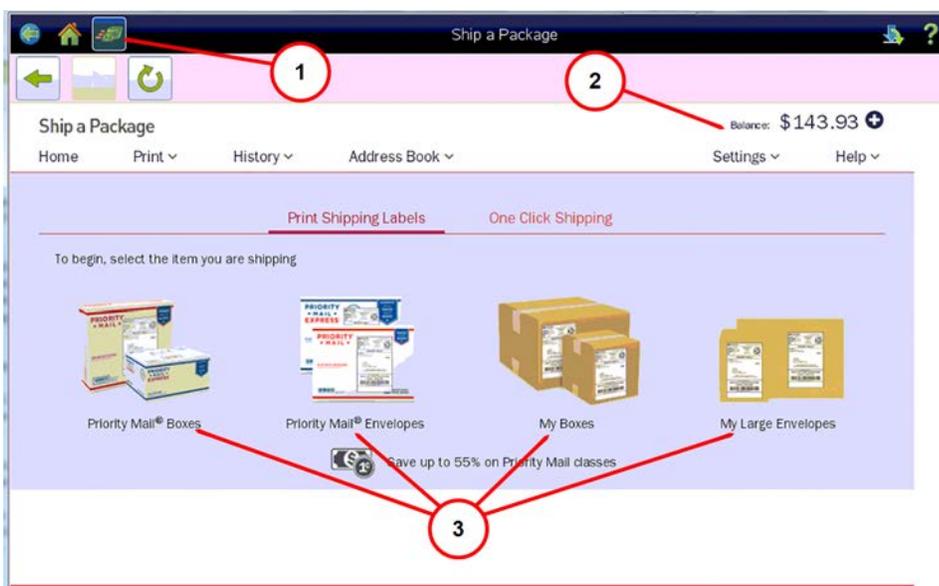
In order to process a shipping label with Ship aPackage, you need to use the Keyboard/Trackball provided with the Ship a Package kit.

---

## Logging into Ship a Package

You login to Ship a Package by clicking on the Ship a Package application button located next to the Run Mail button on the Home screen.

Once you are in the Ship a Package application you can return to the Run Mail application by simply clicking on the Toggle button at the top of your screen.



1. Click on the **Toggle** icon to return to the Mail Run application.
2. Ship a Package account balance.
3. Four choices of shipping label types.

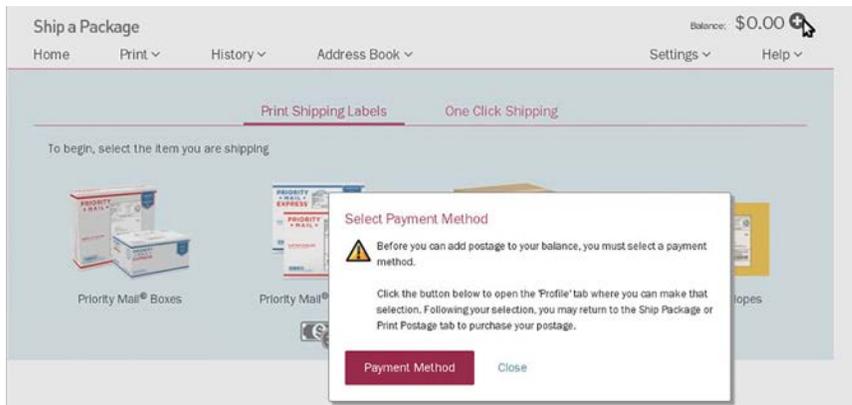
To start creating a shipping label go to

[Creating and Printing a Shipping Label - Overview.](#)

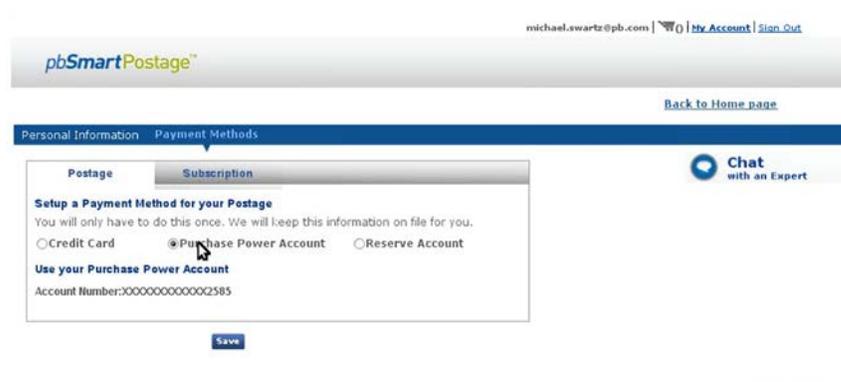
## Setting up a Payment Method

You select the payment method the first time you add postage to your Ship a Package account. You can choose either a Reserve Account or a Purchase Power Account. Refer to [Setting up a Funds Account](#) for information on setting up these accounts.

1. Click the (+) icon next to Balance displayed in the top right corner of the Home screen. You are prompted to select the payment method.



2. Click on the **Payment Method** button.



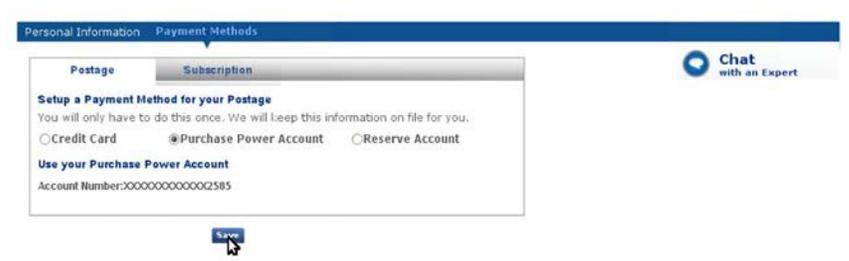
3. For this example, click on the option button for **Purchase Power Account**. Then click on the **Save** button.



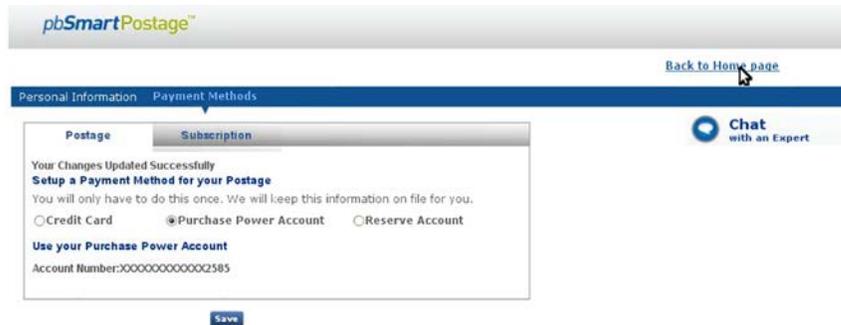
4. Click on **Subscription**.



5. Click on **Postage**.



6. Click on **Save**. You are notified that your changes have been updated successfully.

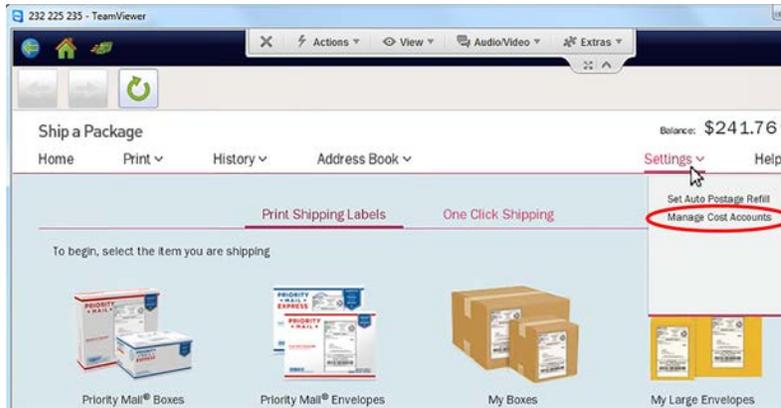


The screenshot shows the pbSmartPostage™ website interface. At the top, there is a navigation bar with the logo and a "Back to Home page" link. Below this is a secondary navigation bar with "Personal Information" and "Payment Methods" tabs. The main content area is divided into "Postage" and "Subscription" sections. A notification box in the "Postage" section states: "Your Changes Updated Successfully" and "Setup a Payment Method for your Postage". It includes instructions: "You will only have to do this once. We will keep this information on file for you." and three radio button options: "Credit Card", "Purchase Power Account" (which is selected), and "Reserve Account". Below these options, it says "Use your Purchase Power Account" and displays "Account Number:XXXXXXXXXXXX2585". A "Save" button is located at the bottom of the notification box. To the right of the notification box, there is a "Chat with an Expert" button.

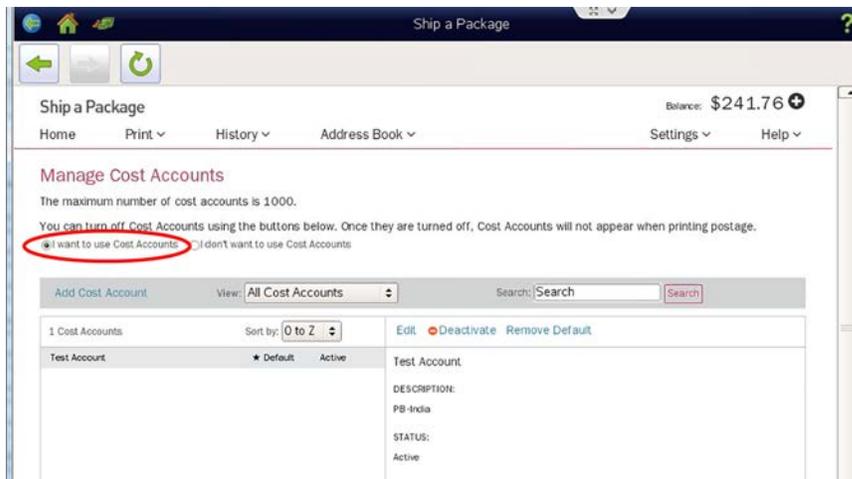
7. Click on **Back to Home page**.
8. This takes you back to the Ship a Package Home screen.
9. Click the (+) icon next to Balance displayed in the top right corner of the Home screen and add postage as described in [Adding Postage to Ship a Package Account](#).

## Setting up and Using Cost Accounts

1. Touch or click on **Settings** and select **Manage Cost Accounts**.

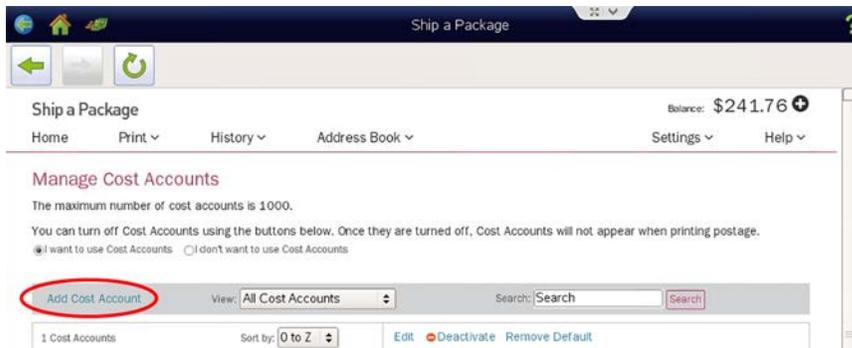


2. The Manage Cost Accounts screen opens. To enable Cost Accounts, make sure the option button for **I want to use Cost Accounts** is checked.

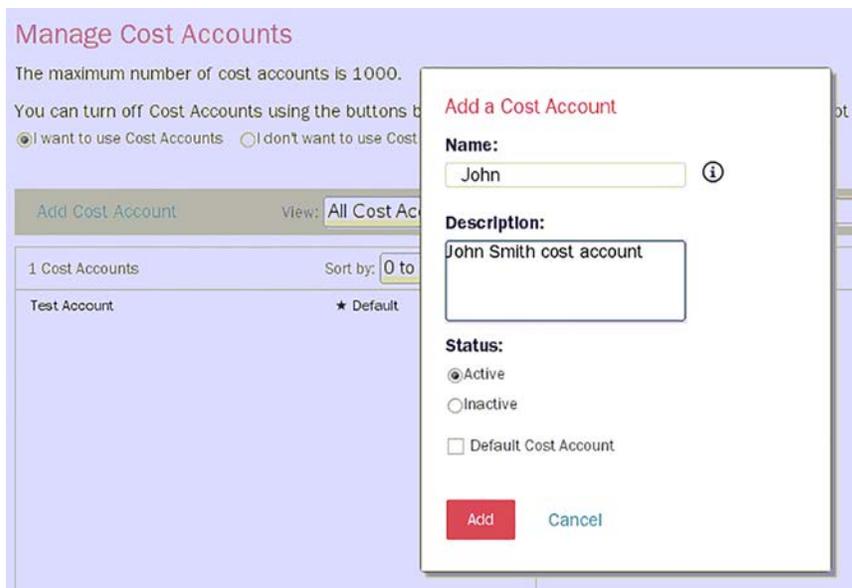


## To Add a Cost Account

1. Touch or click on the **Add Cost Account** link.



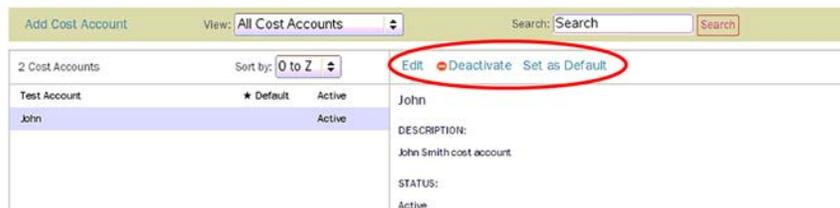
2. Add a name and description in the Add a Cost Account dialog box that opens. Make sure the option button for **Active** is checked.



3. Click the **Add** button at the bottom of the dialog box to finish.

## To Edit a Cost Account

1. Select the account name from the left panel in the Manage Cost Accounts screen. The account details are displayed in the right panel.
2. Select one of the options from the details panel.



- **Edit** - Change the description, make the account active or inactive. You can set this as the default cost account.
- **Deactivate** - Displays when an active account is selected. Click **Yes** in the confirmation dialog box to deactivate the account.
- **Activate** - Displays when an active account is selected. Click **Yes** in the confirmation dialog box to deactivate the account.
- **Set as Default** - Make the selected account the Default for the Enterprise. Click **Yes** in the confirmation dialog box to complete the action. Note that when you deactivate a Default Cost Account, no other account becomes the default. If you want a default account, you must designate an account as Default Cost Account.

## Using a Cost Account

When you add postage, you can assign an amount of postage to a cost account to track your postage purchase transactions. Refer to [Adding Postage](#).

You can also assign a cost account when you create a shipping label. [Refer to Creating and Printing a Shipping Label - Procedure](#).

## Setting up a Funds Account

You may need to set up an account so that you can refill postage to your Ship a Package account. You can do this by setting up one of the following accounts.

- Reserve Account
- Purchase Power Account

## Setting up a Purchase Power Account

Purchase Power is a Pitney Bowes credit line that allows you to pay for equipment, postage and supplies through a single account. With Purchase Power, you can consolidate all your meter and permit postage, equipment and supplies costs on one monthly statement.

To set up a Purchase Power Account:

1. Go to the [www.pitneybowes.com](http://www.pitneybowes.com) and click on the **Support** link at the top of the page.
2. Click on the **Postage** link, and under the "Postage Management" section, select **Paying for Postage**.
3. Under the "Bill-Later Option" section, click on **Purchase Power**. Follow the instructions in this section.

## Setting up a Reserve Account

A Reserve Account (FDIC Insured) is a deposit account used to fund postage on your Pitney Bowes meter. Funds are held in an FDIC-insured account at The Pitney Bowes Bank, Inc., and earn interest in the form of postage credits based on the average daily balance.

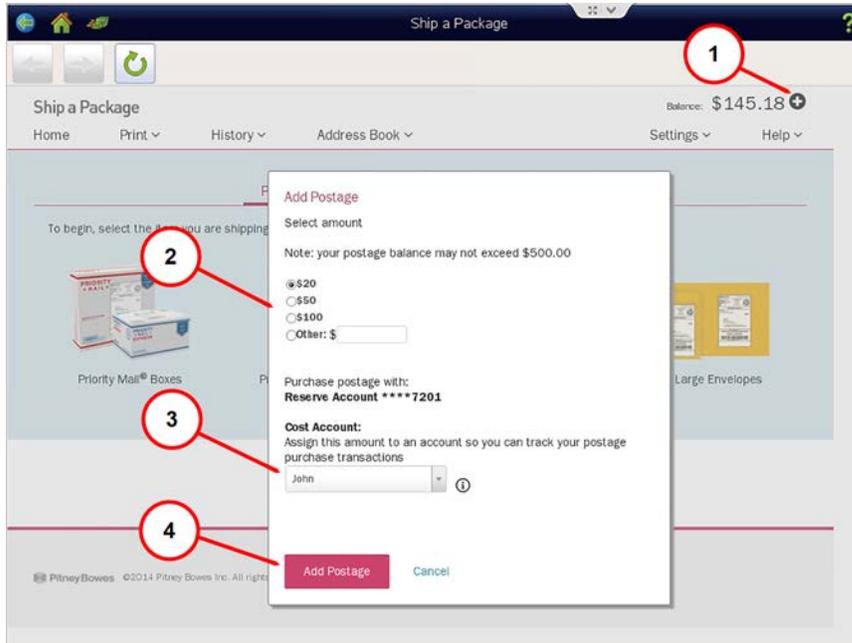
To set up a Reserve Account:

1. Go to the [www.pitneybowes.com](http://www.pitneybowes.com) and click on the **Support** link at the top of the page.
2. Click on the **Postage** link, and under the "Postage Management" section, select **Paying for Postage**.
3. Under the "Pre-Paid" section, click on **Reserve Account**. Follow the instructions in this section.

## Adding postage to your Ship a Package account

Your Ship a Package postage account balance is displayed in the top right corner of the screen.

1. Click the (+) icon next to your balance to add postage. The Add Postage dialog box opens.



Whenever you add postage, the payment method and the last 4 digits of the account number are displayed in the Add Postage dialog box. If this is the first time you are adding postage, you will be prompted to type in the payment method. Refer to [Setting up a Payment Method](#) for more information.

2. Select the amount of postage you want to add. The minimum you can add is \$10.00; the maximum is \$500.00.
3. (OPTIONAL) Select a cost account.
4. Click the **Add Postage** button.

You can also set options for automatically adding postage when you run below a specified amount. Refer to [Setting the Auto Postage Refill Amount](#).

## Setting the Auto Postage Refill Amount

If you want Ship a Package to automatically add postage to your account when the balance falls below a threshold you choose, select **Settings**, then **Set Auto Postage Refill** from the Ship A Package home screen.

## Using the Address Book

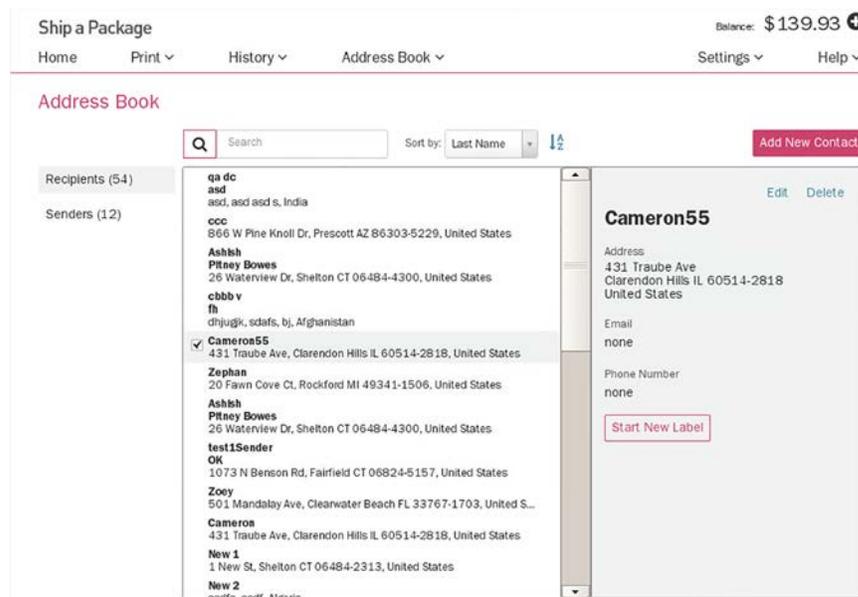
You can use the Address Book screen to add, update, or delete contacts. You can also start creating a shipping label from the address book by selecting an address. This section includes:

- [\*Selecting an Address\*](#)
- [\*Adding an Address\*](#)
- [\*Editing or Deleting an Address\*](#)
- [\*Verifying an Address\*](#)

### Selecting an address

You can access the Address Book directly from the Ship a Package home screen.

1. Select **Address Book**, then **View Address Book** directly from the Ship a Package home screen.
2. Click on the checkbox in front of the address you want. The selected address appears in the right pane.




---

## Note:

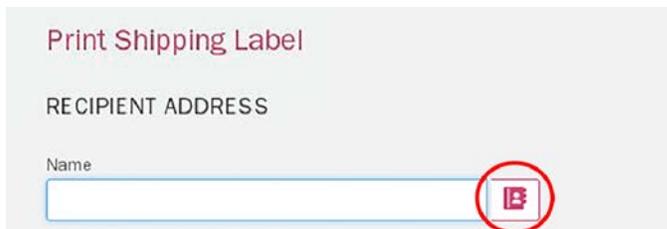
You can select multiple addresses by holding down the CTRL key and clicking in the checkboxes for the addresses.

---

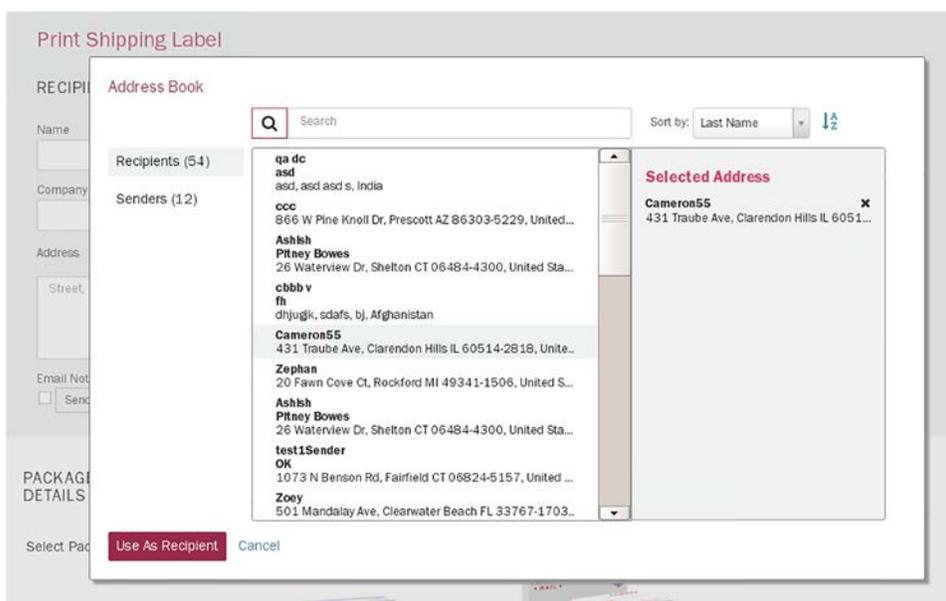
3. To create a shipping label using this address, click on the **Start New Label** button. The Print Shipping Label screen opens and the address information is added to the Recipient Address fields.

In addition, you can access the Address Book from the Print Shipping Label screen.

1. From within the Print Shipping Label screen, select the **Address Book** icon.



2. Click to select and highlight an address from the list of addresses. The selected address appears in the right pane.



3. Select the **Use As Recipient** button. The information is added to the Recipient Address fields.

## Adding an address

1. Select **Address Book**, then **View Address Book** directly from the Ship a Package home screen.
2. Select the **Add New Contact** button.
3. Type in the address information in the fields provided.
4. Select **Save Changes** at the bottom of the screen when done.

5. The Ship a Package application performs address verification. It displays any differences between the USPS matching address and the address you entered and provides an option for you to either accept the USPS address or make any additional changes.
6. Once you accept or modify the address, it is added to the contact list.

If you have a desktop version of PB Smart Postage you can import addresses into that account and they will appear in the Ship a Package application.

## Editing or Deleting an Address

1. *Select the address* from the Address Book.
2. Select the **Edit** or **Delete** link.
  - If you select the **Edit** link:
    - a. The address information fields are displayed. Make any changes necessary.
    - b. Click **Save Changes** at the bottom of the screen when done.
    - c. The Ship a Package application performs address verification. It displays any differences between the USPS matching address and the address you entered and provides an option for you to make any additional changes.
    - d. Once you accept or modify the address, the updated address displays in the contact list.
  - If you select the **Delete** link:
    - a. You are asked to confirm that you want to delete the address(es).
    - b. Click on the **Delete** button to remove the contact(s).

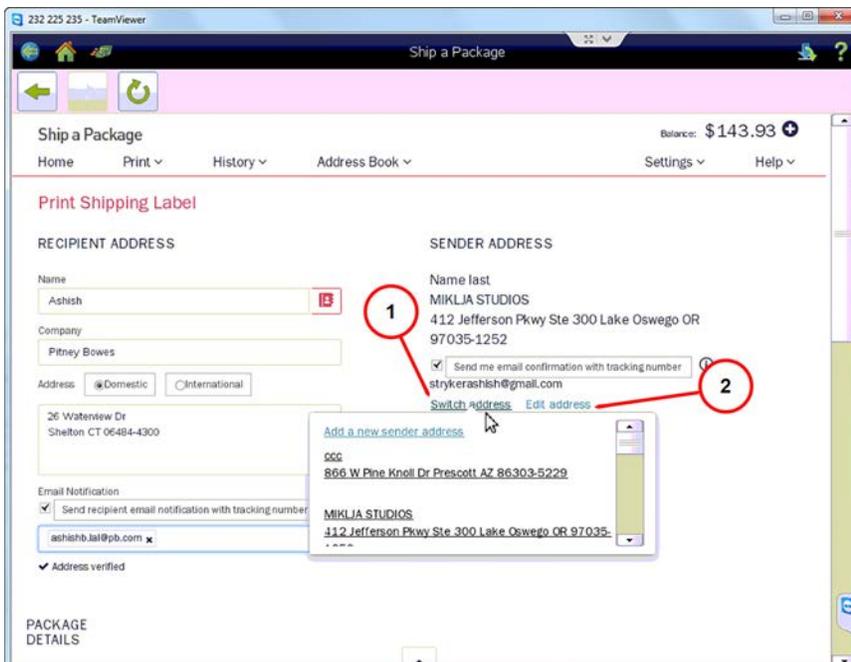
## Verifying an Address

Whenever you enter an address, for example - when entering the recipient address information when creating a shipping label, or when adding an address to the Address Book - you are prompted to click Verify and Accept. You will see the address you entered, and the USPS recommended address. Select one. You have the option of saving the recipient to your Address Book.

You can also verify an address by selecting **Address Book**, then **Verify An Address** directly from the Ship a Package home screen. Simply fill in the address information fields and click on the **Verify Address** button.

## Temporarily change the default sender address

You can temporarily change the default SENDER ADDRESS within the Print Shipping Label screen.



1. To add additional sender addresses or to select a different one from a list of other stored sender addresses, select the **Switch address** link.
2. To edit the current default SENDER ADDRESS, select the **Edit address** link. This opens the address information fields for the current address.
3. Select the **Accept & Verify** button when done.

---

### Note:

This only changes the SENDER ADDRESS for this shipping label. When you create another label, the original default SENDER ADDRESS is restored. To change your SENDER ADDRESS permanently, refer to [Permanently Changing the Default Sender Address](#).

---

## Permanently Change the Default Sender Address

To change the default SENDER ADDRESS in the Print Shipping Label screen:

1. Go to [www.pitneybowes.com](http://www.pitneybowes.com) and sign in to my account.
2. Select the **Edit account info** link in the Account Management category.
3. Make any necessary address changes.
4. Allow 5 business days for the change to take effect.

## Creating and printing a shipping label - Overview

You can create and print shipping labels for four types of envelopes and packages. These are displayed on the Ship a Package home screen when you start the application.



They include:

- a. Priority Mail Boxes: USPS-branded flat-rate boxes.
- b. Priority Mail Envelopes: USPS-branded flat-rate envelopes.
- c. My Boxes: shipping containers you provide.
- d. My Large Envelopes: Flat mailers you provide.

The procedures for creating the four types of shipping labels are very similar. The main differences are in the Mailing and Shipping and Extra Services options available for each type. In addition, if you are creating labels for Priority Mail Boxes or Envelopes, the Package Details are already provided as part of those services.

---

### Note:

When you are creating a shipping label within the Ship a Package application you need to use the scroll bar to proceed from one screen to the next.

---

Refer to:

- *Creating and Printing a Shipping Label - Procedure*
- *Creating a Shipping Label Preset with One Click Shipping*
- *Creating an International Shipping Label*

## Creating and Printing a Shipping Label - Procedure

Follow the steps below to create a shipping label for box containers you provide. Remember, when you are creating a shipping label within the Ship a Package application you need to use the scroll bar to proceed from one screen to the next.

1. Select **My Boxes** from the Ship A Package home screen.
2. Type in the RECIPIENT ADDRESS information manually or by [accessing the Address Book](#) and selecting a contact there.

The screenshot shows the 'Print Shipping Label' form. On the left is the 'RECIPIENT ADDRESS' section with fields for Name (Ashish), Company (Pitney Bowes), Address (27 Waterview Dr, Shelton CT 06484-4300), and Email Notification (checked, with email address ashishb.jal@pb.com). At the bottom left is an 'Accept & Verify' button. On the right is the 'SENDER ADDRESS' section with fields for Name last (MIKLJA STUDIOS), address (412 Jefferson Pkwy Ste 300 Lake Oswego OR 97035-1252), and a 'Send me email confirmation with tracking number' checkbox. Below this are links for 'Switch address' and 'Edit address', and a 'Ship from ZIP' field (97035) with an 'Edit' link. Red circles with letters 'a' through 'd' are placed over the address field, email notification checkbox, 'Accept & Verify' button, and 'SENDER ADDRESS' header respectively, with lines pointing to the corresponding text in the list below.

- a. If you type in the address manually, type in the entire address including street, city, state and ZIP code in the address block.
- b. To request that an email with a tracking number be sent to the recipient, select this option and include an email address.
- c. Select the **Accept & Verify** button to verify the address.
- d. You can also change the SENDER ADDRESS for this shipping label. Refer to [Temporarily Change the Default Sender Address](#).

3. Scroll down to the PACKAGE DETAIL section and for this example, select the **Irregular Package** icon.

PACKAGE DETAILS Change

Irregular Package

Dimensions:  
Length is the longest dimension. Girth is the distance around the thickest part.

14 in 12 in

Weight:  
25 lb 6 oz Get weight from scale

Accept Cancel

- a. Type in the package dimensions.
- b. If you know the weight, type it in now. If not, place the package on the scale and click on the **Get weight** icon. The weight displays in the Weight fields.

---

### Note:

If the scale does not respond, select the **Toggle** icon at the top of the Ship A Package screen. This takes you back to the Run Mail application. [Zero the Scale from within Running Mail](#), then select the **Toggle** icon again to return to Ship A Package. The weight should now display here.

---

- c. Click on the **Accept** button to approve the weight.
4. Scroll down to the USPS MAILING & SHIPPING SERVICES section.

14 in 12 in

Weight:  
25 lb 6 oz Get weight from scale

USPS MAILING & SHIPPING SERVICES

Mail Class ⓘ  
Select a mail class

Ship Date  
6/4/2015 Edit

## Ship a Package

5. Select the drop-down field under **Mail Class** and select the class (Priority Mail Express in this example). Only those classes available with the package specifications you have entered are displayed.

USPS MAILING & SHIPPING SERVICES

Mail Class ⓘ

Select a mail class

Media Mail®	8 Days	\$15.22
Parcel Select®	8 Days	\$53.19
Standard Post®	8 Days	\$53.24
Priority Mail®	2 Days	\$60.47
Priority Mail Express™	1-Day 12:00 PM	\$132.04

Ship Date  
6/4/2015 Edit

6. Scroll down and enter Insurance and Extra Services as needed.

USPS MAILING & SHIPPING SERVICES

Mail Class ⓘ

Priority Mail Express™	1-Day 12:00 PM	\$132.04
------------------------	----------------	----------

Ship Date  
6/4/2015 Edit

Est. Delivery  
1-Day 12:00 PM

\$132.04

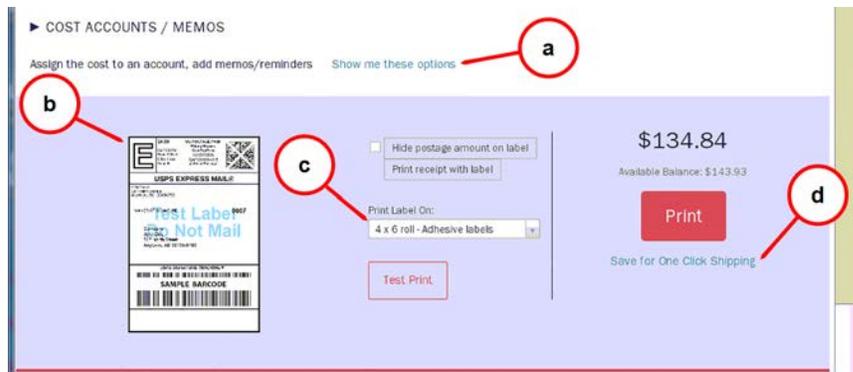
Sender Phone Number  
555-555-5555

Insurance  
USPS Insurance

Extra Services

<input checked="" type="checkbox"/> Return Receipt Required Form 3811	\$2.80
<input type="checkbox"/> Recipient signature required at delivery	
<input type="checkbox"/> Do not deliver on the weekend	

7. Scroll down to display COST ACCOUNTS/MEMOS and Print section.



- a. To assign the cost of this label to a cost account, click on the **Show me these options** link. For more information on cost accounts, refer to [Setting up and Using Cost Accounts](#). This also allows you to enter Memos which are notes for future reference. You can view Memos in [Transaction History](#). You may enter any text up to 50 characters.
  - b. A sample label is displayed.
  - c. To change the type of label (for example, 4 x 6 to 8.5 X 11) select the **Print Label On** drop-down and select the label.
  - d. If you want to save the settings for this label as a preset, select the **Save for One Click Shipping**. For more information, refer to [Creating a Shipping Label Preset - One Click Shipping](#).
8. Click on the **Print** button when ready to print. Remove the label from the printer and apply it to your package.

## Creating a shipping label preset with One Click Shipping

One Click Shipping allows you to save the settings for a shipping label so you can send similar packages in the future. You can also save an open shipping label to One Click Shipping.

---

### Note:

One Click Shipping is not available for International shipping.

---

1. Select **One Click Shipping** from the Ship a Package home screen.
2. Select the **Create** icon.
3. The Create For One Click Shipping screen opens.
4. Follow the same steps as you do for *Creating and Printing a Shipping Label* until you get to the end of the shipping label setup (on the COST ACCOUNTS / MEMOS screen).
5. Select the **Save** button. You are prompted to name the shipment. You have the option of saving the recipient address with the shipment.

**Save For One Click Shipping**

You can save this shipping label information to quickly send similar packages in the future. Saved labels can be found under One Click Shipping.

Name this shipment

Bill

If a shipment with this name exists, overwrite it

Save recipient address for this shipment

Save Cancel

### Using or Editing a One Click Shipping Preset

1. Select **One Click Shipping** from the Ship a Package home screen.
2. Hover over the preset icon (to view the preset details).



3. Select the **Open/Edit** link.
  - a. To use the preset to print a label, scroll to the bottom and select the **Print** button.
  - b. To edit the preset, make changes you want, then scroll to the bottom screen and select **Save**.

## Creating an international shipping label

If you are shipping internationally — to a country other than UNITED STATES — follow these instructions.

The procedure for creating an International shipping label is similar to that for [Creating and Printing a Shipping Label](#). The main differences include adding the recipient address information and entering information required for customs purposes. Only those differences are called out in the images in the example here.

---

### Note:

- You need to use the scroll bar to proceed from one screen to the next in the Ship a Package application.
- For international shipping labels, you must print to the 8.5 x 11 Brother (IE20/EI30) Report Laser Printer.

---

To create a shipping label for box containers you provide:

1. Select **My Boxes** from the Ship A Package home screen.
2. Type in the RECIPIENT ADDRESS information manually or by [Accessing the Address Book](#) and selecting a contact from there. Be sure to select the Address option for International.

3. Scroll down to the PACKAGE DETAIL section and for this example, select the **Large Package** icon. In addition to entering the dimensions and weight, you need to provide details about the package contents.

---

## Note:

Irregular Packages are not available for international shipping. Your options also will vary with the country selected.

---

PACKAGE DETAILS [Change](#)

Large Package

Dimensions:

15 in x 15 in x 20 in

Weight:

20 lb 0 oz  Get weight from scale



Package content details

Shipping internationally requires you provide info about your package content. [Tell me more.](#)

What kind of package are you sending?

Select

**a**

**b**

- a. If you know the weight, enter it now. If not, place the package on the scale and select the **Get weight** icon. The weight displays in the Weight fields.

---

## Note:

If the scale does not respond, click on the **Toggle** icon at the top of the Ship A Package screen. This takes you back to the Run Mail application. *Zero the Scale from within Running Mail*, then click on the **Toggle** icon again to return to Ship a Package. The weight should now display here.

---

- b. Click in the drop-down for **What kind of package are you sending?** and select the appropriate option.

4. Type in the information for each item in the dialog provided. Click on **Add this item** when complete.

Package content details

Shipping internationally requires you provide info about your package content. [Tell me more.](#)

What kind of package are you sending?

Gifts

Item #1 Detail

Item Description

Decorative Clock

Number of pieces

1

Weight Per Piece

20 lb 0 oz  Get weight from scale

Value per piece (USD)

\$ 200.00

Item was made in

UNITED STATES

**Add this item** Cancel

## 5. Select the customs details.

Customs details for

AES Exemption ⓘ **a**

Select

Select

NOEEI 30.37(a) - Value of each class of goods is \$2,500 or less **b**

NOEEI 30.37(h) - Authorized shipment of gift parcels or humanitarian donations

NOEEI 30.36 - Shipments destined to Canada

Other exemptions, please specify

No exemption, specify ITN

I certify that the above details are correct and agree to the  USPS Privacy Act Statement and  Restriction and Prohibition **c**

## a. For AES Exemption, select:

- 30.36 if shipping to Canada
- 30.37(a) or 30.37(h) if shipping to a country other than Canada

b. Be sure to click **USPS Privacy Act Statement** and **Restriction and Prohibition** and read the information contained in each section.c. If you agree with the terms, select the checkbox for **I certify ...** to proceed.

## 6. Select the mail class in the USPS MAILING &amp; SHIPPING SERVICE SECTION.

## 7. Add Email Notifications, Cost Accounts, or Memos (optional) in the COST ACCOUNT / MEMOS section.

8. When you have completed all the required fields, click either **Test Print** or **Print**. For international shipping labels, you must print to an 8.5" x 11" printer; either the Pitney Bowes 1E05/1E08/1E20 models or Brother HL5450DN (1E30) Printer.

## ► COST ACCOUNTS / MEMOS

Assign the cost to an account, add memos/reminders [Show me these options](#)

Hide postage amount on label

Print receipt with label

Print Label On:

8 1/2 x 11 sheet - Plain paper **c**

Test Print

\$78.87

Available Balance: \$191.89

Print

Save for One Click Shipping

9. Regardless of the mail class used (First Class International, or Priority Mail International), a single sheet of paper is printed. The top half of the sheet contains the international shipping label.
  - a. Cut the top half of the sheet and tape it to the parcel.
  - b. Save the bottom half for your records.

# Transactions

You can view the transaction history, track a package and view transaction reports from the **History** selection on the Ship A Package home screen.

Refer to:

- [View the Transaction History](#)
- [Track a Package](#)
- [View Transaction Reports](#)

## View the Transaction History

To view your transaction history, select **History** then **View Transactions** from the Ship a Package home screen.

The Transactions history screen provides a line-item summary of all the transactions. Each line represents a single transaction.

Ship a Package Balance: \$177.180

Home Print History Address Book Settings Help

Transactions

a: All Transactions b

DATE Start: 02/12/2015 End: 05/12/2015 View all Transactions Search GO

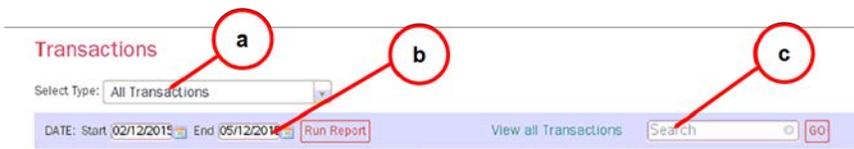
Details	Date	Tracking Number	Recipient	Company	Address
	05/12/2015	9470109699937002123481	Aaron Abbott	Fairfield	1073 N Benson Rd, Fairfield, CT, 06824-5157
	05/12/2015	9470109699937002123474	Cameron		431 Traube Ave, Clarendon Hills, IL, 60514-2818
	05/12/2015	9405509699937002123461	Zoey		501 Mandalay Ave, Clearwater Beach, FL, 33767-1700
	05/12/2015	9461209699937002123459	test1Sender	OK	1073 N Benson Rd, Fairfield, CT, 06824-5157
	05/12/2015	9434609699937002123446	Ashish	Pitney Bowes	26 Waterview Dr, Shelton, CT, 06484-4300
	05/12/2015	9470109699937002123412	test1Sender	OK	1073 N Benson Rd, Fairfield, CT, 06824-5157
	05/12/2015	9405509699937002123409	Ashish	Pitney Bowes	26 Waterview Dr, Shelton, CT, 06484-4300
	05/12/2015	9405509699937002123393	Cameron65		431 Traube Ave, Clarendon Hills, IL, 60514-2818
	05/12/2015	9405509699937002123379	Ashish	Pitney Bowes	26 Waterview Dr, Shelton, CT, 06484-4300
	05/12/2015	9405509699937002123218	test.add def		30 Executive Dr, Danbury, CT, 06810-4147

Displaying items 1 - 10 of 203

- a. The **Date** column corresponds to the transaction date and is the date printed on the shipping label.
- b. The **Tracking Number** is a unique number assigned to each shipping label transaction. It is used to electronically track the package as it moves through the mailstream. For USPS® packages, it is the e-confirmation number associated with the confirmation service selected. Refer to [Track a Package](#) for more information.

Use the scroll bar at the bottom of the screen to scroll to the right to view additional items (Cost, Carrier, Mail Class, Package Weight, Insurance Cost, Cost Account, and Memos). You can also sort by column by clicking on the column.

## Filter the Transaction History screen results

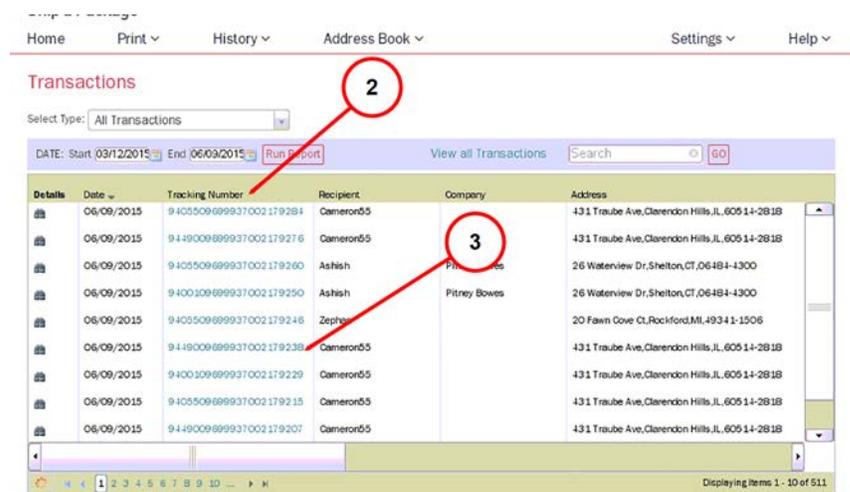


You can filter the transactions displayed according to:

- Type - click in the **Select Type** field and choose from the drop-down list (All Transactions, All Packages, Insured Packages, Postage Purchased, Postage Balance Adjustment). For a summary of the reports generated by type, refer to [View Transaction Reports](#).
- Date range - set the beginning and end dates by clicking on the calendar icons and selecting the dates.
- Search by recipient, class, carrier, tracking number, origin ZIP, destination ZIP, country, or account - This function appears for all reports except Postage Purchased and allows you to display a filtered report based on your search. To perform a search, type your search text in the entry box, select the desired search criteria from the drop-down list, then click the **Go** button to view your results.

## Track a Package

1. Select **History** then **View Transactions** from the Ship A Package home screen.



## Ship a Package

2. Locate the transaction you want to track from the list of transactions. To sort by Tracking Number, click on the column header for **Tracking Number**.
3. Click on the Tracking Number link for the transaction.
4. A pop-up box appears.

**Label Details**

User: DK Tucker  
Package ID: 6596ca811b894bf680d0db80d6565187  
Purchased on: 12-15-2014 06:03:38

Mail class: Priority Mail (0lb 10oz) \$6.51  
Total: \$6.51

Recipient Address: Russel LaBarre  
24 Chapaquoit Way  
East Sandwich, MA 02537-1613

Sender address: DK Tucker  
584 Castro St  
# 672  
San Francisco, CA 94114-2512

Carrier: USPS Tracking number: 9405509699939495433355

Status	Local time	Date	Location
Delivered			
Delivered, In/At Mailbox	14:21:00	2014-12-19	EAST SANDWICH,
Out for Delivery	10:00:00	2014-12-19	EAST SANDWICH,
Sorting Complete	09:50:00	2014-12-19	EAST SANDWICH,
Arrived at Post Office	09:01:00	2014-12-19	EAST SANDWICH,
Departed USPS Facility	05:00:00	2014-12-19	PROVIDENCE,

Close

- a. If the USPS does not have delivery status details, the pop-up box will only contain the Label Details (top portion).
- b. If the USPS has delivery status details, the pop-up box will show the details.

## View Transaction Reports

The following is a summary of the transaction reports available for viewing within the Ship a Package application.

## All Transactions

- This report displays all the transactions printed in the timeframe you defined for the Reports page.
- By default, this report contains the columns for Transaction Details, Tracking Number, Recipient, and Class.
- At the bottom-center of this report is a Show/Hide Columns link that opens a pop-up window that allows you to create a fully customizable report by selecting any number of the columns to be displayed in the report. After you've made your selections and clicked OK, the pop-up is closed and the newly defined report is displayed.

## All Packages

- The summary displays the transaction date and time, tracking number, mail class, account, and recipient country (shipping labels only).
- The Details pop-up window for any line item in the summary displays the user name, package ID, purchase date and time, mail class and related special services, itemized charges, total charges, origin address, recipient Address (shipping labels only), carrier, and carrier tracking number.
- Clicking the tracking number of any line item of the summary displays the Details pop-up window, which includes the tracking number.

## Insured Packages

- This report displays all completed transactions that have had the Insured additional service purchased. It also shows the declared value of the transaction and the insurance provider.
- The summary displays the transaction date and time, tracking number, and recipient (shipping labels only).

## Postage Purchased

- This report displays your postage purchased only for the selected time period.
- The summary displays the transaction date and time, amount, and account (from the Charge To field, if used).

## Postage Balance Adjustment

- This report displays all the transactions submitted for approved postage label refunds.
- The “Original Transaction” date for shipping labels is the date the label was originally printed. For all other entries in the table, the Original Transaction date will be the same as the Credit Applied date.

- Shipping label has status of "In-Process," (the refund for the postage label is pending) "Approved," (refund is made and the funds are returned to the Postage Balance), or "Denied." All other entries have status of "Approved".
- Credit/Debit Applied - If a postage dispute decreases your account, then the "refund" is shown as a negative value.

## Request a refund

You can request a shipping label postage refund within 30 days of printing.

1. Select **History** then **Request a Refund** from the Ship a Package home screen.
2. Locate the transaction for which you want a refund from the list of transactions displayed.
3. In the **Get Refund** column, click the icon for the desired transaction.

Ship a Package Balance: \$317.92

Home Print History Address Book Settings Help

### Request a Refund

Postage balance adjustment

Transaction Date (GMT)	Tracking Number	Details	Get Refund	Recipient	Cost
6/9/2015 8:36:47 AM	9405509699937002179284			Cameron55 431 Traube Ave	\$5.25
6/9/2015 8:35:07 AM	9449009699937002179276			Cameron55 431 Traube Ave	\$2.72
6/9/2015 8:28:26 AM	9405509699937002179260		👉	Ashish Pitney Bowes 26 Waterview Dr	\$5.25
6/9/2015 8:20:16 AM	9400109699937002179250			Ashish Pitney Bowes 26 Waterview Dr	\$2.04
6/9/2015 8:19:31 AM	9405509699937002179246			Zephah 20 Fawn Cove Ct	\$6.51
6/9/2015 8:11:45 AM	9449009699937002179238			Cameron55 431 Traube Ave	\$4.22
6/9/2015 8:04:20 AM	9400109699937002179229			Cameron55 431 Traube Ave	\$2.35
6/9/2015 7:46:37 AM	9405509699937002179215			Cameron55 431 Traube Ave	\$6.02
6/9/2015 7:37:40 AM	9449009699937002179207			Cameron55 431 Traube Ave	\$2.72
6/9/2015 7:32:58 AM	9400109699937002179137			test1Sender OK 1073 N Benson Rd	\$2.04
6/9/2015 7:07:53 AM	9400109699937002179113			Ashish Pitney Bowes 26 Waterview Dr	\$2.04
6/9/2015 6:52:09 AM	9449009699937002179105			test1Sender OK 1073 N Benson Rd	\$7.72

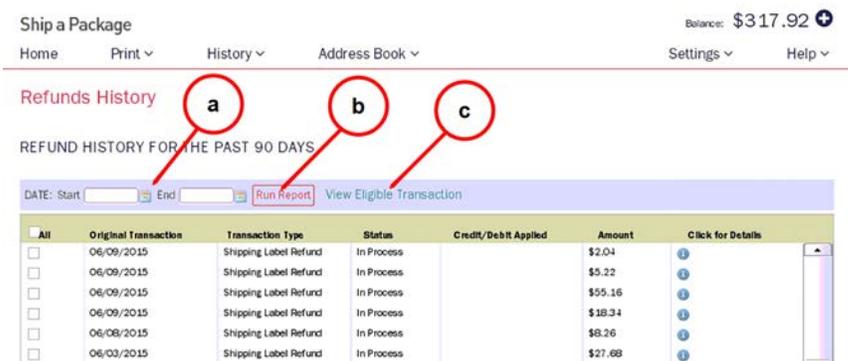
Displaying items 1 - 15 of 324

\* A Shipping label refund may only be requested within 30 days of printing

4. In the Refund Request pop-up window, select **Submit**. The dialog advises you that the refund request has been submitted.
5. Select **OK** to close the pop-up window and return to the eligible transactions displayed in the Request a Refund screen.

## View the Refund History

1. Select **History** then **Request a Refund** from the Ship A Package home screen.
2. Select **Postage balance adjustment** link on the Request a Refund screen to view the refund history for the past 90 days.



3. To view refunds for a specific range of dates, set the beginning and end dates by clicking on the calendar icons and selecting the dates.
4. Select **Run Report**.
5. To view only those transactions that are eligible for refunds, select the **View Eligible Transaction** link.

# 7 - Receive a Package

## In this section

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## All about Receive a Package

---

### NOTE:

This feature may not be available in all markets. For further advice please contact your local Pitney Bowes office.

---

The Receive a Package application is a tracking system that you use to record deliveries of inbound packages. It can be used to:

- Automate and streamline the process of receiving packages.
- Know that a package was received and to help prevent lost or misplaced deliveries.
- Scan 1D and 2D barcodes.
- Maintain record of receipts.
- Access history of received packages.
- Send an email notification to recipients advising them of received packages.

After you have placed an order for the Receive a Package feature, you will receive a welcome email instructing you how to obtain your login and password details. This will enable you to access the Receive a Package feature. These login details should be the same as your Pitney Bowes account. If you do not receive or mislay the welcome email please contact your local Pitney Bowes office for further support.

## Setting up a cable-connected scanner

---

### NOTE:

This feature may not be available in all markets. For further advice please contact your local Pitney Bowes office.

---



Connect the scanner to an open USB port. You will hear a beep when the scanner is recognized.

Your scanner is ready to use.

[Tell me more about scanning barcodes...](#)

Barcode scanners read the barcodes printed on shipping labels. A simple 1D barcode may tell you the tracking number and carrier name. A 2D barcode may contain more information, and can often provide the sender and recipient names.



### Set up your scanner

1. To set up your scanner, connect it to an open USB port.
2. The system will beep when it recognizes the scanner. At that point, your scanner is ready to use.

## Receiving a package

---

### NOTE:

This feature may not be available in all markets. For further advice please contact your local Pitney Bowes office.

---

1. Select the **Receive a Package** button on the Receiving tile on the Home screen.
2. If you have a scanner, scan the carrier's barcode. The system extracts all the information possible from the barcode.  
If you do not have a scanner, enter the tracking number in the Tracking number field.
3. If the carrier does not appear in the Carrier field, select the field and choose the carrier from the list of carriers.  
If the carrier is not listed, select **Other**, and enter the carrier's name in the Comments field.
4. If the recipient and sender names do not appear in the fields, select each field and choose the names from the list.
  - a. If a name does not appear in the list, enter the name and select enter.
  - b. Enter the information in the Add Contact dialog screen.
  - c. Select **Save** when done.
5. If the package is damaged, select the **Arrived damaged** check box.
6. Click **Comments** to enter additional information. If you selected "Other" in the carrier field, enter the carrier's name here.
7. Click **Save**.

## The Packages screen

---

### NOTE:

This feature may not be available in all markets. For further advice please contact your local Pitney Bowes office.

---

You can use the Packages screen to list all of the packages on the system.

1. Select the **Packages** button on the Receiving tile on the Home screen.
  - You can sort the list by date in descending or ascending order by selecting the down arrow for the Receiving column.
  - You can also search for a particular package in the search field (enter carrier, tracking number, recipient or sender).
2. Select the > arrow to the left of the Received column to reveal complete details for a package.
  - Select **View More** to see the complete package history, including time stamps.
  - Select **Edit** to information for the package.
  - Select **Delete** to remove the package record.

## Find a package

---

### NOTE:

This feature may not be available in all markets. For further advice please contact your local Pitney Bowes office.

---

1. Select the **Find a Package** button in the Mailing tile on the Home screen.
2. Enter a **Tracking Number or Name**.
3. Press the **Enter** key. If a package is found, it will be listed.
4. Select the **>** arrow in front of the package to reveal all of the details for the package.
  - a. Select **View More** to see the complete package history, including time stamps.
  - b. Select **Edit** to information for the package.
  - c. Select **Delete** to remove the package record.

## Package Notifications

Receive a Package will inform the recipient that a package has arrived via email. You can turn this feature on or off in the Package Notifications window.

---

### NOTE:

This feature may not be available in all markets. For further advice please contact your local Pitney Bowes office.

---

Recipients must have a valid email address that can be added via the Contacts button in the Mailing tile on the Home screen.

You can also customize the email subject and message, if desired.

1. Select the **Package Notifications** button in the Mailing tile on the Home screen.
2. Select the **ON/OFF** toggle switch.



## Managing Contacts

To view all of your recipient or sender contacts, select the **Contacts** button on the Receiving tile on the Home screen.

- You can display only recipients or senders by selecting either **Sender** or **Recipient** from the All contacts field. You can also search for a particular recipient or sender in the search field.
- You can sort the list alphabetically in descending or ascending order by selecting the down arrow for the Contact column.
- To remove a contact, select the settings icon to the right of the Type column and choose **Remove**.
- To edit a contact, select the settings icon to the right of the Type column and choose **Edit**. Make necessary changes and select **Save**.

To add a new contact:

1. Select the **Receive a Package** button on the Receiving tile on the Home screen.
2. Enter the new name in either the Sender or Recipient field and select enter.
3. Enter the information in the Add Contact dialog screen.
4. Select **Save** when done.

# 8 - Accounting

## In this section

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## All about Accounting

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

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

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

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

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

### Using a multi-level account structure

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

Your accounting structure can vary depending on your requirements. You can structure your accounts in single or multiple levels. For example, you can divide a top level department (account) into two additional sub sections.

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

Example:

Account - **Engineering**

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

Example:

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

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

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

Example:

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

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

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

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

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

---

### Note:

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

---

## Account attributes

When you create accounts, you assign the following attributes to each top level account, sub account, and sub sub account:

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

---

## Note:

Account passwords must be turned on before they can be added to accounts.

---

## Acceptable special characters for account names

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

System	~	`	!	@	#	\$	%
Budget Manager			x	x	x	x	x
Business Manager				x	x	x	
PC Transfer Utility			x		x	x	x
SendPro® P-Series			x	x	x	x	x

System	^	&	*	(	)	_	-
Budget Manager			x	x	x	x	
Business Manager			x	x	x	x	
PC Transfer Utility			x	x	x	x	
SendPro® P-Series			x	x	x	x	

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

System	]	"	'	:	;	?	/
Budget Manager			x	x		x	x
Business Manager				x			x
PC Transfer Utility			x	x		x	x
SendPro® P-Series				x		x	x

System	,	.	<	>	0-9	a-z	A-Z
Budget Manager	x				x	x	x
Business Manager					x	x	x

System	,	.	<	>	0 - 9	a - z	A - Z
PC Transfer Utility	x	x			x	x	x
SendPro® P-Series	x	x			x	x	x

## Uploading postal and transactional information for Business Manager

If your SendPro® P-Series system uses Business Manager accounting, you will need to upload your postal and transactional information to Pitney Bowes. You can do this by selecting the **Manage Accounts** button in the Mailing tile on the Home screen.

---

### Important:

Upload this information prior to synchronization to ensure that Business Manager can obtain the most current data from your mailing and shipping system. If you upload postal and transactional data periodically throughout the day it will reduce the overall upload time.

---

Refer to your *Business Manager User Guide* for more information about synchronization.

## Uploading postal and transactional information for Business Manager

If your SendPro® P-Series system uses Business Manager accounting, you will need to upload your postal and transactional information to Pitney Bowes. You can do this by selecting the **Manage Accounts** button in the Mailing tile on the Home screen.

---

### Important:

Upload this information prior to synchronization to ensure that Business Manager can obtain the most current data from your mailing and shipping system. If you upload postal and transactional data periodically throughout the day it will reduce the overall upload time.

---

Refer to your *Business Manager User Guide* for more information about synchronization.

## Creating, editing or deleting an account

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

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

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

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

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

---

### Note:

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

---

## Creating an account

---

### Note:

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

---

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

3. If there are existing accounts on the system, you will be prompted to create a new account or add a sub account. Select **Create new account**.
4. Select the **Account name** field. Type in the account name and then select **OK**.
5. Select the **Code** field. Type in the code for the account and select **OK**.
6. If necessary, select the **Description** field. Type in the description for the account and then select **OK**.
7. Ensure the status is set to **Active**.
8. If you want to password protect this account, select the Password field.

---

### Note:

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

---

- a. Type in the password and select **OK**.
  - b. Re-type the password to confirm and select **OK**.
9. Select **OK**.
  10. A dialog box appears indicating the account as been created.
    - Select **Create another new account** if you want to create another account.
    - Select **Add a sub account to this account** if you want to create a sub account for this account.

---

### Note:

Sub accounts are an optional feature.

---

- Select **Done** twice to return to the Home screen.

## Creating a Sub Account or Sub Sub Account

Sub accounts and sub sub accounts are an optional feature.

---

## Note:

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

---

1. You can create an account in two ways:
  - by selecting the **Manage Accounts** button in the Mailing tile on the Home screen, or
  - by selecting **Account** on the Run Mail screen, selecting **Options** and then **Add sub account to existing account**.
2. Select **Create new account**.
  - a. When prompted, select **Add sub account to existing account**.
  - b. Select the appropriate account and then select **OK**.
3. Select the **Sub** or **Sub sub account name** field. Type in the name and then select **OK**.
4. Select the **Code** field. Type in the code for the account and select **OK**.
5. If necessary, select the **Description** field. Type in the description for the account and select **OK**.
6. Ensure the status is set to **Active**.
7. If you want to password protect this sub or sub account, select the **Password** field.

---

## Note:

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

---

- a. Type in the password and select **OK**.
  - b. Re-type the password to confirm and select **OK**.
8. Select **OK**.

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

## Changing the account status to inactive

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

---

### Note:

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

---

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

## Editing an account

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

---

### Note:

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

---

1. You can edit an account in two ways:
  - by selecting the **Manage Accounts** button in the Mailing tile on the Home screen, or
  - by selecting **Account** on the Run Mail screen, selecting **Options** and then **Edit selected account**.
2. Select **Edit account**.
3. Select the account you want to edit and then select **OK**.

4. Select the account attribute you want to edit.
  - Account, Sub account or Sub sub account name: Select this option to make changes to the name of the account you have selected.
  - Code: Select this option to change the code you have assigned to the account.
  - Description: Select this option to edit the account description.
  - Status: Select the appropriate option to change the status (active or inactive) of the account.

---

### Note:

When you change the status of an account the status change applies to all sub accounts and/or sub sub accounts. If prompted to apply the change of status of multiple accounts, select **Yes, apply to all**.

---

- Password: Select this option to password protect an account, or to edit the existing password.

---

### Note:

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

---

Type in the appropriate information and select **OK**.

5. Once you have finished editing the account information, select **OK**.
6. Select **Done** to return to the Home screen.

## Deleting an account

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

If you have already charged transactions to an existing account you cannot delete the account. If you want to prevent users from charging transactions against this account, you can set the account status to inactive. Refer to Changing the Account Status to Inactive for more information.

---

## Note:

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

---

1. You can delete an account in two ways:
  - by selecting the **Manage Accounts** button in the Mailing tile on the Home screen, or
  - by selecting **Account** on the Run Mail screen, selecting **Options** and then **Delete selected account**.
2. Select **Delete account**.
3. Select the account, sub account or sub sub account you want to delete, and select **OK**.
4. A dialog box appears indicating the account(s) will be deleted.
  - If there are lower level sub accounts or sub sub accounts related to your selection, Select **Yes, delete accounts** to delete all account levels.
  - If this is a single level account, or the lowest account level, select **Yes, delete account**.
5. A dialog box appears indicating the account has been deleted. Select **OK**.
6. Select **Cancel** to return to the main Manage Accounts screen.
7. Select **Done** to return to the Home screen.

## Turning account passwords on and off

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

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

---

## Note:

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

---

To turn account passwords on or off:

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

## Accounting options when running mail

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

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

---

### Note:

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

---

## Selecting an account while running mail

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

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

3. Select the appropriate account and then select **OK**.

---

### Note:

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

---

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

## Changing account search criteria

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

1. On the Run Mail screen, select the **Accounts** in the Mail Information list box. The Select Account screen displays.
2. Select the **Options** button.
3. Select **Manage account search criteria....** The Account search criteria dialog displays.
4. Select the appropriate search options in the Search by: list.
  - Account Name
  - Account Code
  - Account description
5. Select **OK** when you are done making your changes.

## Choosing the columns that appear when viewing accounts

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

---

## Note:

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

---

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

## Searching for an account

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

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

1. Select the **Search** field.
2. If necessary, change the account search criteria.

3. Type in the search term. As you type, the best match is displayed in the Search Results tab.

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

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

---

### Note:

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

---

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

## Sorting the account list

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

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

## Viewing unlocked accounts only

If a password is assigned to an account, a padlock icon will appear next to the account name in the account list. You can set your system to show only unlocked accounts (accounts that do not require a password) when viewing the account list.

1. On the Run Mail screen, select the **Accounts** button in the Mail Information list box. The Select Account screen displays.
2. Select the **Options** button.
3. Select the **Show unlocked account only** check box.
  - A check mark indicates that only unlocked accounts will appear in the account list.
  - An empty check box indicates that all accounts will appear in the account list.
4. The system updates the account list to correspond with the option you selected.
5. Select an account and then select **OK** to return to the Run Mail screen.

## Clearing an account while running mail

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

---

### Note:

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

---

## Ending a batch

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

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

# All about transactions

## What is a transaction?

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

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

---

### Note:

A transaction is often referred to as a batch.

---

Other reasons a transaction can close automatically:

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

If your system has the WEIGH-ON-THE-WAY® (W-O-W®) feature, the weight break for each piece of mail is tracked as part of the transaction. If the class changes due to auto class switching within a mail run then the system will automatically open a new transaction. As mail pieces are processed it is possible that the class will change back and forth (i.e. 1st Class and Priority). The system will record the mail pieces to the correct transaction if this happens. When the transaction ends then the system will store two separate transactions as part of the batch.

## Managing transactions

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

## Viewing transactions

---

### Note:

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

---

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. The Filter Transaction List screen displays.
4. You can select a new filter from the Saved Filters list, or you can add or edit criterion to create a new filter.

To select a saved filter:

- a. Select **Saved Filters**.
- b. Select a filter from the list and then select **OK**.
5. Select **View Transactions**. The Transaction List screen displays with a list of transactions that match the criterion of the filter you selected.
6. If you want to add or remove the columns of information that appear on the Select Accounts screen, or to modify the order in which they appear, select **Columns...**
7. To add a column to the Transaction List screen:
  - a. Select a column in the Available columns: list.
  - b. Select the **Add** button.
8. To remove a column from the Transaction List screen:
  - a. Select a column in the Show these columns in this order: list.
  - b. Select the **Remove** button.
9. To change the order of the columns on the Select Accounts screen:
  - a. Select a column in the **Show these columns in this order:** list.
  - b. Use the **Move** buttons to move the column up or down in the list.

10. Select **OK** when you are done making your changes. The Transaction List screen displays with the new column order.
11. If you want to view transactions using a different filter, select **Filter list...**
12. Select **Done** to return to the Transactions screen.

## Editing transactions

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

---

### Note:

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

---

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. By default, the Filter Transaction List screen displays with the criterion from the previously selected filter. You can select a new filter from the Saved Filters list, or you can add or edit criterion to create a new filter.

To select a saved filter:

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

6. Select the **Actions** button on the bottom of the screen and then select **Edit transactions**. The Edit Transaction screen displays.

---

### Note:

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

---

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

## Filtering the transaction list

A filter is a set of criterion used to select a group of transactions on your system for viewing and editing.

There are many examples of why you might want to use a filter. For example, you might want to view all transactions that were entered during a specific date range (e.g., between April 1 and April 15) that does not exactly match a standard week, month or other period. Or you might want to view all the transactions that were entered for a group of accounts during the current month.

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

### Filter criterion

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

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

## Creating a transaction filter

Follow the steps below to create a new filter for transactions. For more information about transaction filters, refer to [Filtering the Transaction List](#).

---

### Note:

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

---

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. By default, the Filter Transaction List screen displays with the criterion from the previously selected filter.

4. Select the **Add criterion** button to add or remove criterion contained in the filter.

---

### Note:

The button name will vary depending upon the criteria present in the filter.

---

#### **Add or edit the date criterion**

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

#### **Add criterion**

- a. Select the **Account** option.
- b. Select **Next**.
- c. Select the **Add Accounts** button.
- d. Select the accounts you want to search for transactions. A check mark indicates that an account has been selected.

- e. Select **OK**. A list of the accounts you selected will appear.
    - If you do not want to view transactions for a particular account, select **Remove**.
    - If you want to clear the account list and start again, select **Remove all accounts**.
    - Select **Add accounts** to add additional accounts to the list.
  - f. Select **OK**.
5. Select **Save as** to save the filter. Type in the filter name and select **OK**.
  6. Select **View transactions** to view the transaction list with the filters applied.

## Editing transactions

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

---

### Note:

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

---

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. By default, the Filter Transaction List screen displays with the criterion from the previously selected filter. You can select a new filter from the Saved Filters list, or you can add or edit criterion to create a new filter.

To select a saved filter:

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

6. Select the **Actions** button on the bottom of the screen and then select **Edit transactions**. The Edit Transaction screen displays.

---

### Note:

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

---

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

## Deleting a transaction filter

---

### Note:

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

---

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

## All about surcharges

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

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

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

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

---

### Note:

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

---

## Setting Up and Editing Global Surcharges

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

---

## Note:

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

---

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

## Selecting Job IDs while running mail

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

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

- If you know the Job ID 2, type in the ID number and select **OK**.
- If you want to see a list of recently used Job ID 2's, select **View all recent Job ID 2's**. Select the appropriate Job ID 2 and then select **OK**. If necessary, you can use the arrow keys to scroll through the list.
- If you want to remove the Job ID 2 from the job, select **Clear Job ID 2**.

## Selecting a surcharge while running mail

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

---

### Note:

All three global surcharges must be selected in order for the surcharge options to appear on the Run Mail screen. Refer to Setting Up and Editing Global Surcharge Options for more information.

---

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

If you want to edit a specific surcharge:

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

If you want to add or remove a surcharge:

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

## All about Job IDs

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

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

### Requiring and autoclearing Job IDs

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

---

#### Note:

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

---

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

- Selecting this option for Job ID 2 means the system will clear the Job ID 2 at the end of each batch.
  - Job ID 1 and Job ID 2 options must be set individually. Autoclearing Job ID 1 does not automatically do the same for Job ID 2.
5. Select **Done** to return to the Home screen.

## Selecting Job IDs while running mail

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

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

## All about accounting reports

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

### **Account Detail report**

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

### **Account Summary report**

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

### **Quick Profile report**

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

### **Transaction Log report**

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

### **Account List report**

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

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

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

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

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

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

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

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

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

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

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

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

### **Daily Snapshot report**

The daily snapshot report lists the meter name, last piece print time, class of mail, pieces, postage amount, total pieces and total postage run on your system during the current day. Since this is a daily report, the counts are reset at midnight (system time) each day.

---

## A note about Business Manager:

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

---

## Printing accounting reports

An attached printer is required to print an accounting report.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **View & print reports**.
4. Select the report you want to print.
5. Select the **Next** button.

6. If necessary, you can modify the report settings. Select a setting, and then make the appropriate changes. The settings vary, depending upon the report selected.
7. If necessary, select the **Actions** button and save the report for future use.
  - If you want to save the report with the existing name, select **Save**. When prompted, select **Yes, save**.
  - If you want to save the report with a new name, select **Save as**. When prompted, select **Yes, save as**. Type in the report name and select **OK**.

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

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

## Exporting accounting reports

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

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

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

9. Select the **Actions** button.

10. Select **Export report**. The report export screen displays.
11. Select the **File name** field.
  1. Type in the file name.
  2. Select **OK**.
12. Select the **Export to:** field.
  - a. Select the location where you want to export the file.
    - If you want to export the file to the root of the USB drive, select the drive in the Export to: field.
    - If you want to export the file to specific folder on the USB drive, select a folder and then select the **Open** button. Repeat this process until you have drilled down to the folder you want to use, then select the folder in the Export to: field.
  - b. Select **Select this folder**.
13. Select the export file type.
14. Select **OK**.
15. The system will alert you when the export is complete. Select **OK**.
16. Select **Cancel** to return to the report list.

## Viewing accounting reports

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **View & print reports**.
4. Select the report you want to view.
5. Select the **Next** button.
6. If necessary, you can modify the report settings. Select a setting, and then make the appropriate changes. The settings vary, depending upon the report selected.
7. Select the **View report** button.
8. If necessary, select the **Actions** menu to save, delete, export or print the report. Select the appropriate option and follow the prompts.
9. Select **Done** then **Continue** to return to the Home screen.

## Viewing and printing the daily snapshot report

The Daily Snapshot report provides a quick view (summary) of a day's accounting. It requires minimal processing so it is ready for viewing within around two minutes of the transactions being uploaded. It's a great tool to use for completing end-of-day reports when you do not have time to wait for the standard reports to process.

Follow the steps below to view and/or print the daily snapshot report.

---

### Note:

You cannot export this report.

---

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **Daily Snapshot Report**. The report appears onscreen for viewing.
4. Select **Refresh** to ensure you are viewing the most up-to-date information.
5. Select **Print Report**. The report will print to the attached printer.

## Setting up the default reporting period for accounting reports

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

- The default fiscal year runs from January 1st to December 31st.
  - The default reporting period is calendar month.
1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
  2. Select **Reports**.
  3. Select **Report Period**.

4. Select the calendar icon next to the Start date of fiscal year field.
  - a. Select a date on the calendar that appears.
  - b. Select **OK**.

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

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

## Default report period types

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

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

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

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

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

## Setting account report preferences

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

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

## Deleting accounting reports

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **View & print reports**.
4. Select the report you want to delete.

5. Select **Delete report...**
6. Select **Yes, delete**. The report is removed from the list.

## Saving a copy of an accounting report

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

# 9 - Reports

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## All about mailing reports

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

### Available mailing reports

The following mailing reports are available on your system.

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

---

### Note

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

---

## Printing a mailing report

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

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

## All about funds and refill reports

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

### Refill Receipt report

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

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

### Refill Summary report

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

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

### Funds report

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

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

## Confirmation services receipt

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

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

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

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

## Confirmation services summary report

The Confirmation Services Summary report provides a list for the Confirmation Services pieces you have processed.

- Barcode: the barcode or package identification code.
- Postage: the amount of postage used.
- ZIP: destination ZIP® Code of the package.
- Uploaded: the date and time record was uploaded to the Pitney Bowes data center.
- Printed/Created: the date and time the report was printed.

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

- Customer mailer ID: the customer identifier uploaded to the USPS.
- PBP account number: your postage account number.
- Meter number: the number assigned to the meter.
- Meter name: the name assigned to the meter (optional).
- Customer reference: the recipient name, invoice number, customer ID number, document number, etc. you used to identify the piece of mail.
- Class and Service: the class of mail and type of Special Service used.

# 10 - Refilling your Meter

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## All about postage

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

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

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

## Pitney Bowes postage account

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

If you need assistance with the postage account, have your postage account number ready and call the Postage By Phone® System number.

## Your postage meter

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

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

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

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

## Refilling your meter

1. You can access the Funds application by selecting the **Funds** button in the Mailing tile on the Home screen, selecting the **Postage in meter** button on the bottom of the Run Mail screen, or selecting **Add Postage to Meter** when you receive a low funds warning or an insufficient funds error.
2. If necessary, select the **Meter Funds** tab.
3. If necessary, select the **Refill my Meter** button.

---

### Note:

The maximum and minimum postage refill amounts for your system are listed on the Meter information tab.

---

4. When prompted, select **Confirm**. The system connects to the Data Center and begins to refill your meter.
5. The system will notify you when it finishes refilling your meter. If you want to print a receipt select the **Print receipt** button.
  - To print the receipt on an envelope, place an envelope of the feed deck and select the **Start** button.
  - To print the receipt on a piece of tape, select the **Tape** button.
  - If you have an optional attached printer, select the **Print on document** button.
6. Select **Done** to return to the Home screen.

## Checking your balance at Pitney Bowes

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

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. If necessary, select the **Meter Funds** tab.
3. Select **Get Balance** to obtain your current postage account balance. The system will notify you once the account balance has been updated. If you are using a LAN connection, and are constantly connected to your postage account, the balance updates automatically.
4. Select **OK**.
5. Select **Done** to return to the Home screen.

## Postage remaining

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

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

## Postage refill settings

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

- The low funds warning value is the value at which the mailing system warns you that the funds remaining in the meter are getting low. When the available postage reaches the low funds warning value, an alert will display.
- The default refill amount is the suggested value that appears when manually refilling your meter.

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

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

## Viewing the refill history

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

---

### Note:

The user name displays if users are enabled on your system.

---

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

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

## Viewing the meter information

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

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

## Finding the minimum and maximum postage values

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

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

## Finding your postage account number

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

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

## Uploading postal information

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

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

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

## Withdrawing the meter

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

---

### Note:

Pitney Bowes must authorize a meter withdrawal.

---

When instructed, follow the procedure here.

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Meter information** tab.
3. Select **Withdraw meter**.
  - If Pitney Bowes has authorized the withdrawal, a dialog box appears indicating that funds are being transferred and the meter is being withdrawn. Select **OK** once the process is complete.
  - If Pitney Bowes has not authorized the withdrawal, a dialog box appears indicating that the meter cannot be withdrawn.
4. Select **Done** to return to the Home screen.

# 11 - Rates and updates

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## Checking for rates and updates automatically

If you have enabled the rates and updates scheduler to automatically check for and download updates, the system will check for any available updates at the time you have set.

---

### Important:

You must install the rates and software updates once they are downloaded.

---

1. Select the **Rates and Updates** button when an update is available for download. The system then downloads any new updates that are available.
2. Once the download is complete the Install updates dialog screen displays. You are prompted to install updates.
3. A countdown message appears on the Install updates dialog screen beginning at 5:00 minutes. The system will automatically install the update when the countdown reaches 0:00 minutes unless you select *Install now* or *Install later*.
  - Select **Install now** if you want to install the updates at this time. Follow the prompts to complete the update installation.
  - Select **Install later** if you want to install the updates at another time. The system opens the Rates and Updates Scheduler. You can use the scheduler to postpone the installation up to 4 times.

---

### Note:

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

## Using the rates and updates scheduler

Your SendPro® P-Series system can be set up to check for and download rates and software updates automatically at a specific time each day. The Rates and Updates button in the Mailing tile on the Home screen will show an exclamation mark when updates become available.

---

### Note:

You must install the rates and software updates once they are downloaded.

---

## Turning the scheduler on for the first time

To turn the scheduler on:

---

### Note:

Once you turn the update scheduler on it cannot be turned off.

---

1. Select **Set up Scheduler** when prompted, or select **Rates and Updates** on the Home screen and then select **Updates Scheduler**.
2. Type in the time of day you want the system to check for rates and updates.
3. Select **Done** to return to the Home screen.

## Changing the scheduler settings

1. Select **Rates and Updates** on the Home screen and then select **Updates Scheduler**.
2. Follow steps 2-3, above, to change the scheduler settings.

## Checking for rates and software updates

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

1. Select the **Rates and Updates** button in the Mailing tile on the Home screen. The system checks for updates and additional features. If updates are available, the system begins the download and displays the amount of time required to complete it.
2. Once the download is complete the Install updates dialog screen displays. You are prompted to install updates.
3. A countdown message appears on the Install updates dialog screen beginning at 5:00 minutes. The system will automatically install the update when the countdown reaches 0:00 minutes unless you select *Install now* or *Install later*.
  - Select **Install now** if you want to install the updates at this time. Follow the prompts to complete the update installation.
  - Select **Install later** if you want to install the updates at another time. The system opens the Rates and Updates Scheduler. You can use the scheduler to postpone the installation up to 4 times.

---

### Notes:

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

## Viewing the update history

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

# 12 - System Setup

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## Personal settings

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

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

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

### Changing your password or password hint

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

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

## Adjusting the touchscreen brightness and contrast

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Personal** from the list on the left side of the screen.
3. Select **Display properties**.
4. Select and drag the control button to adjust the brightness or contrast. Use the + and - buttons for a more precise selection.

## Calibrating the touchscreen

You may need to calibrate the touchscreen if you find it is not responding to touch commands.

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Personal** from the list on the left side of the screen.
3. Select **Touchscreen**.
4. Select the **Calibrate...** button. Follow the onscreen prompts to complete the calibration process.
5. Select the **Home** button to return to the Home screen.

## Application settings

The Application settings allow you to enable tracking services prompts while running mail and to enter or edit the USPS® Mailer ID.

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

### Enabling tracking services prompts

Use this option to enable tracking service prompts while running mail. You can enable the following prompts: Apply label, Enter customer reference, Enter BPOD for Signature Confirmation, Print receipt, Upload records, and Print postal manifest.

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Applications** from the list on the left side of the screen.
3. Select **Tracking Services**.
4. Select the tracking services prompts you want to appear while running mail. A check mark indicates that a prompt is selected.
5. Select **Done** to return to the Home screen.

### Entering the USPS® Mailer ID

Follow the steps below to enter and store the Mailer ID on your system.

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Applications** from the list on the left side of the screen.
3. Select **Tracking Services**.
4. Select the **Mailer ID** field. If you have already entered a Mailer ID while running mail, the ID is saved in this field. If necessary, you can change the Mailer ID here.
  - a. Type in the Mailer ID.
  - b. Select **OK**.

5. If you want to include the Mailer ID for bulk proof of delivery, select the **Include Mailer ID for Bulk Proof of Delivery** check box.
6. Select **Done** to return to the Home screen.

## Internet and network settings

The Internet and Network settings allow you to:

- View the IntelliLink® connection parameters for your postage account.
- Reset the factory settings (if necessary).
- View and export the communications settings. Once exported, the communication setting information is used to set up the SendSuite Xpress™ or Ascent™ interface.
- View the inserter communications settings.
- Initiate Remote Assistance when instructed by a Pitney Bowes service representative.

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

### Viewing and exporting communication settings

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

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

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

The communication settings are typically exported to set up the SendSuite Xpress™ and Ascent™ interface with the SendPro® P-Series system.

1. Select **Export settings to USB drive....**
2. Select the **File name** field.
  - a. Type in the file name.
  - b. Select **OK**.

3. Select the **Export to** field.
  - a. Select the folder on the USB drive where you want to export the file.
  - b. Select **Open**.
4. Select **OK** to export the communication settings.
5. The system will alert you when the export is complete. Select **OK**.
6. Select **Done** to return to the Home screen.

## Viewing the IntelliLink® settings

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

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

---

### Note:

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

---

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

## Viewing DI900™/DI950™ inserter communication settings

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

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

## System settings

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

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

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

### Advancing the date automatically

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

---

#### Note:

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

---

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

Follow the steps below to advance the date automatically.

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

## Postal information upload warning

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

To upload postal information now:

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

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

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

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

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

- If you have a slow network connection and uploads are taking too long, lower the threshold. The upload warning will appear more frequently.
  - If you have a fast network connection and uploads are going quickly, you can raise the threshold if you feel the warnings are appearing too frequently. This will allow the system to create more files before the warning appears.
1. Select the **Settings** button in the Mailing tile on the Home screen.
  2. Select **System** from the list on the left side of the screen.
  3. Select **Postal Information Upload**.
  4. Select the **Enable Postal Upload Warning** check box.
    - A check mark indicates that the warning is enabled.
    - If the check box is empty the warning is disabled.
  5. Select and drag the control button along the slide bar to adjust the threshold. Use the + and - buttons for a more precise selection.
  6. Select **OK** to save your changes.

## Setting the system clock

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Clock**.

4. Select **Synchronize clock** to synchronize the clock.
5. To turn daylight saving time on or off select **On** or **Off**.

---

### Note:

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

---

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

## Setting system timeouts

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

- **Default Job Timeout:** The default job timeout option allows you to specify how much time you want to allow the system to remain idle before it the default job is reloaded on the Run Mail screen. The default timeout is 20 minutes. If necessary, this timeout can be disabled.
  - If the ENERGY STAR® shutdown timeout is not feature enabled on your system, the default job timeout can be set anywhere from one minute to four hours.
  - If the ENERGY STAR® shutdown timeout is feature enabled on your system, the default job timeout must be less than or equal to it in duration.
- **ENERGY STAR® Shutdown:** The ENERGY STAR® shutdown timeout will save money, and help protect the environment. Use this option to specify how long the system remains inactive before it goes into "sleep". The default timeout is 40 minutes. Use the power button to turn the system back on. The ENERGY STAR® shutdown timeout is an optional feature.
- **Postage hold** - If you run mail using the Attached Scale method and you remove the mail piece from the scale, a timer begins and when the timer expires, the Run Mail screen displays the minimum postage amount for the class you selected and the weight returns to zero. You can use the Postage hold option to set the length of the timer from 10 to 60 seconds. If this option is selected, you can only adjust the time. You cannot deselect or turn this option off.
- **Screen Saver Timeout:** The screen saver timeout option allows you to specify how much time you want to allow the system to remain idle before the screen saver appears. The timeout range is 5 minutes to 4 hours.

- **Account Search Timeout:** The Account Search timeout option allows you to search for a particular account and is useful if you have many accounts created in your machine. The timeout can be set to allow you to specify how much time you want the system to wait while you search for the account. The timeout range is 0 milliseconds to 5 seconds.

System timeouts are set within the Settings application.

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

## ENERGY STAR®

### What you should know about ENERGY STAR®

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

### What is ENERGY STAR®

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

## How ENERGY STAR® works on your system

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

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

## Pitney Bowes Commitment

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

## How is the ENERGY STAR® Mode enabled?

The ENERGY STAR® Mode is an OPTION, and is not standard with your base configurations for the SendPro® P-Series. If this option is not part of your sales configuration, the SendPro® P-Series system will not allow the automatic SHUT DOWN to occur.

## Is the system energy efficient without ENERGY STAR® enabled?

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

## Setting up the scanner

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

### Setting the default scan type

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

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

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

### Setting the accounting prefixes

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

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

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

- t<example>

To define the prefixes:

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

4. Select the **Accounting Prefixes** tab. The screen displays the default prefixes assigned to the account fields.
  - Account Name - A\$
  - Account Code - C\$
  - Job Name - P\$
  - Job ID 1 - J\$
  - Job ID 2 - K\$
5. Select the field or fields and type in the appropriate prefix. For example, if you are scanning barcodes that contain account codes beginning with the prefix C\$, you can use the default value. If the account code contain a different prefix enter that value.

### Combining multiple barcodes into a single scan

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

To select the join character for combining multiple barcode scans:

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

## Turning barcode auto-enter on/off

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

To enable or disable auto-enter:

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

## Using scanner diagnostics

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

To determine what the scanner reads in the barcode:

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

## User roles and access rights

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

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

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

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

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

### Enabling user logins

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

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

### Creating, editing and deleting users

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

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## Note:

Supervisor access rights are required to manage users.

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## Creating a user

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## Note:

Supervisor access rights are required to manage users.

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1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.
4. Select **Add new**. The Create Users screen displays.
5. Select the **Username:** field to add the new user name. Type in the user name and select **OK**.
6. If passwords are required on your system, or if the user will have supervisor access, select the **Password** field. Type in the password and select **OK**.
7. Select the appropriate user role: operator or supervisor.
8. If necessary, select the **Password hint** field to add a password hint. Type in the hint and select **OK**.
9. Select **OK** to return to the user settings screen.
10. Select the **Home** button to return to the Home screen.

## User role setup

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

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

## What system functions can I manage?

You can manage operator access the following functions:

- Change data center backup URL
  - Change default refill settings
  - Change distributor URL
  - Perform a balance inquiry
  - Postage Refill
  - Print funds report on machine
  - Print refill receipts
  - Print refill summary
  - Reset batch counter
  - Reset IntelliLink Factory Settings
  - Withdraw a meter
1. Select the **Settings** button in the Mailing tile on the Home screen.
  2. Select **System** from the list on the left side of the screen.
  3. Select **Users**.
  4. Select the **Roles setup** tab.
  5. Select the **Operator** user role.
  6. Select the functions in the **Allow access to:** list that you want users to be able to perform.
    - A check box with a check mark indicates that all operators will have access to the function.
    - An empty check box indicates that all operators will not have access to the function.
  7. Select the **Home** button to return to the Home screen.

### Editing a user

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#### Note:

Supervisor access rights are required to manage users.

---

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

## Deleting a user

---

### Note:

Supervisor access rights are required to manage users.

---

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.
4. Select the user you want to delete. If necessary, use the up and down arrow buttons to navigate through the list.
5. Select **Delete**. If you are deleting the only user on your system, a warning message will appear indicating that user logins will be turned off and all system security will be disabled. If account passwords are being used, they will be disabled as well.
6. Select **Yes, delete user**.
7. Select the **Home** button to return to the Home screen.

## Turning off user logins

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### Note:

Supervisor access rights are required to manage users.

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

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

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

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

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

## Hardware settings

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

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

### Viewing your model and serial number

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

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Hardware** from the list on the left side of the screen.
3. Select **General**. Your system name, model number, PSD PCN, PSD serial number, printer PCN and printer serial number display on the screen.
4. Select the **Home** button to return to the Home screen.

### Setting the waiting for envelope timeout

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

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

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

## Changing the scale vibration setting

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

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

## Zeroing the scale

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

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### Note:

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

---

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

## Resetting the localization value

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

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

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

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Weighing** icon.
3. Select **WEIGH-ON-THE-WAY (W-O-W)**.

4. Select the **lbs** field.
  - a. Use the numeric keypad to type in the weight in lbs.
  - b. Select the oz. field and type in the appropriate weight.
  - c. Select **OK**.
5. Select the **Home** button to return to the Home screen.

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

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

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

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

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

# 13 - Maintenance

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## Installing a new tape roll

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

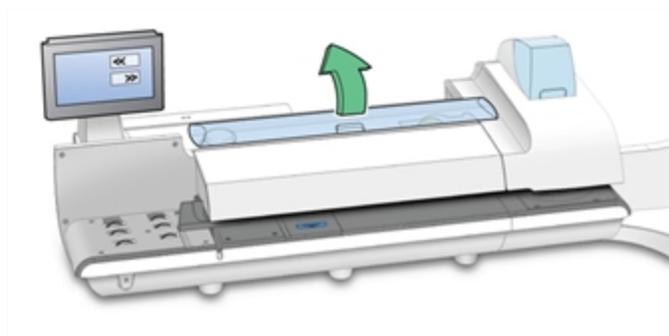


### Caution:

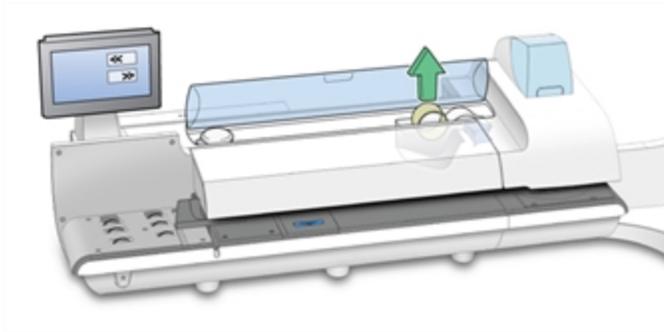
If you do not use Pitney Bowes supplied tape, you will not be able to determine when the tape is running out and this may cause a jam. The red stripe on the tape notifies you that you are running low on tape. There is also a black stripe that tells the machine when it is out of tape. When the system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

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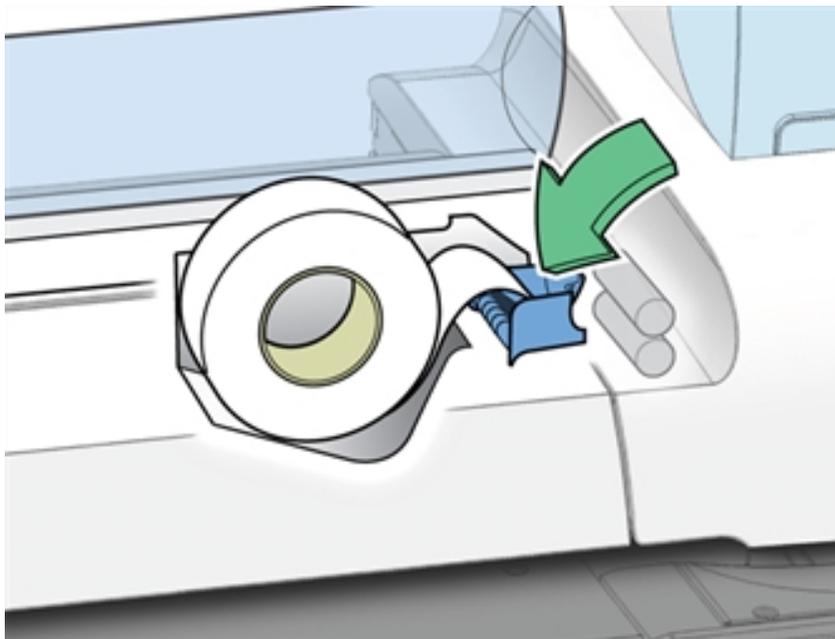
1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Hardware**.
3. Select **Tape**.
4. Select << **Rewind** to bring the tape back for removal.
5. Open the supplies cover.



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



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



11. Close the cover.

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

## Refilling the envelope and tape sealant bottle

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

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

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

## Printing a test pattern

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

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

## Cleaning the print heads

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

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

## Low ink warning

---



### WARNING!

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

---

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

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

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### Note:

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

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## Spot black (#2) low ink warning

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

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

## Out of ink warning

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

---



### Warning!

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

---

## Spot black (#2) out of ink warning

If the spot black (#2) ink cartridge is out of ink, a special Out of Ink warning will appear indicating that printing mail has been disabled to avoid damage to the system.

In order to resume printing you can:

- Replace the ink cartridge
- Turn off spot black (#2) printing

---

### Note:

If spot black (#2) printing is turned off, you can continue to print mail for 14 days. When the period expires you will need to reactivate spot black (#2) printing by installing a new ink cartridge. If you do not install a new ink cartridge spot black (#2) printing will be disabled permanently.

---

## Replacing the ink cartridges

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

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### Warning:

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

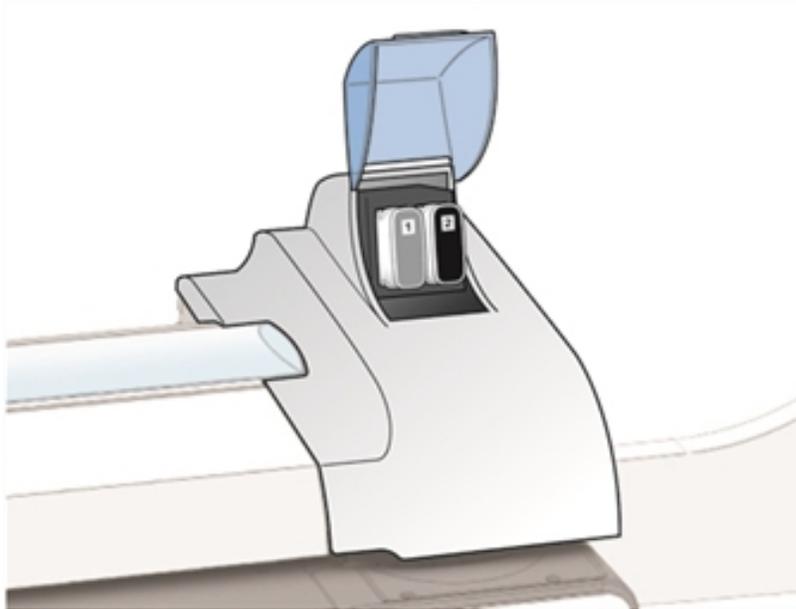
The ink in the cartridge may be harmful if swallowed. Keep new and used cartridges out of reach of children. Discard empty cartridges immediately.

Do not remove the ink cartridge if the print head is not installed. If the ink cartridge and print head are removed at the same time, ink from the print supply line will flow down the tube and squirt from the needle in the ink cartridge holder out into the printer and system interior.

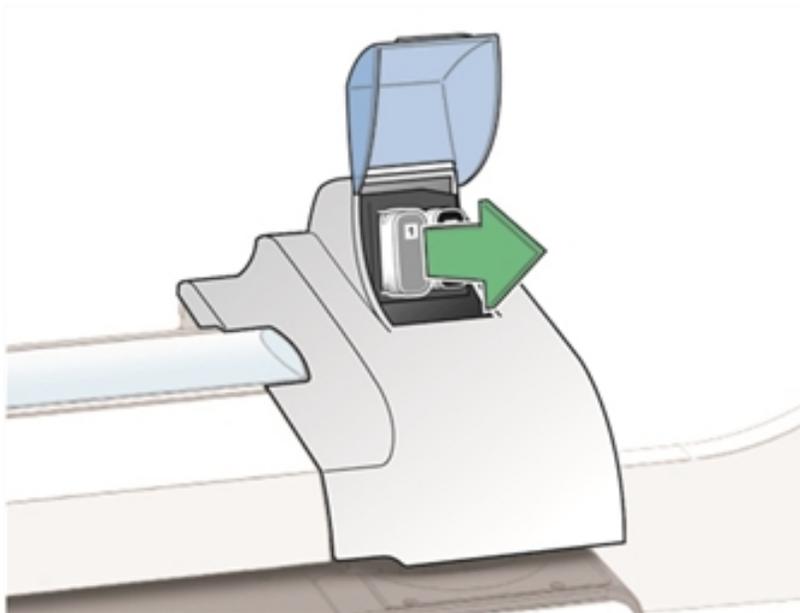
---

1. You can replace the ink cartridges by selecting **Replace ink cartridge** when the low ink or out of ink warning appears. You can also replace the ink cartridges at any time by:
  - a. Selecting the **Settings** button in the Mailing tile on the Home screen.
  - b. Select **Hardware**, then select **Printer**.
  - c. Select the **Ink cartridges** tab.
  - d. Select **Replace ink cartridge**.

2. Open the ink cartridge cover.

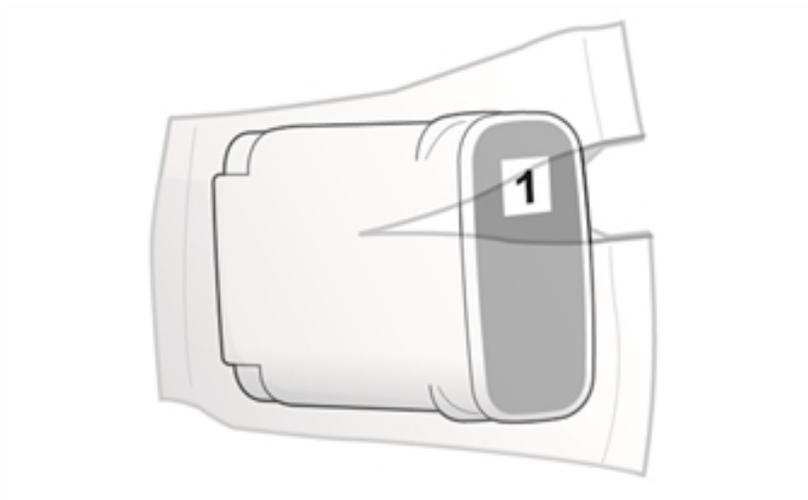


3. Pull the ink cartridge straight out.

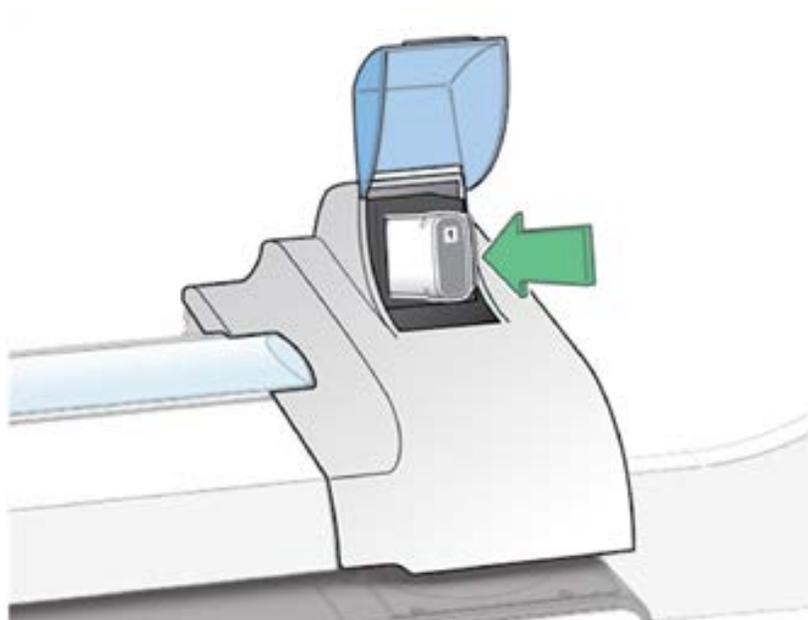


4. The system warns you that the ink cartridge is not installed. Select **Clear message**.

5. Remove the new ink cartridge from its packaging.



6. Hold the ink cartridge with the label facing upright and push into place.



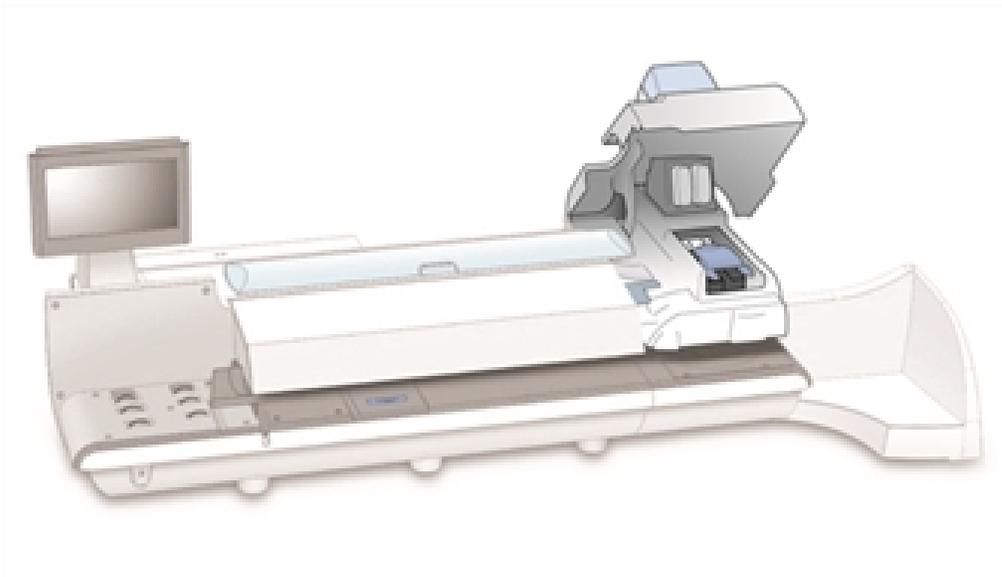
7. Close the ink cartridge cover.
8. Select **Print test pattern** to verify that you have installed the ink cartridge correctly.

9. Check the test sample. If the lines are solid and unbroken, the sample is acceptable. Select **Image is OK - Done**.

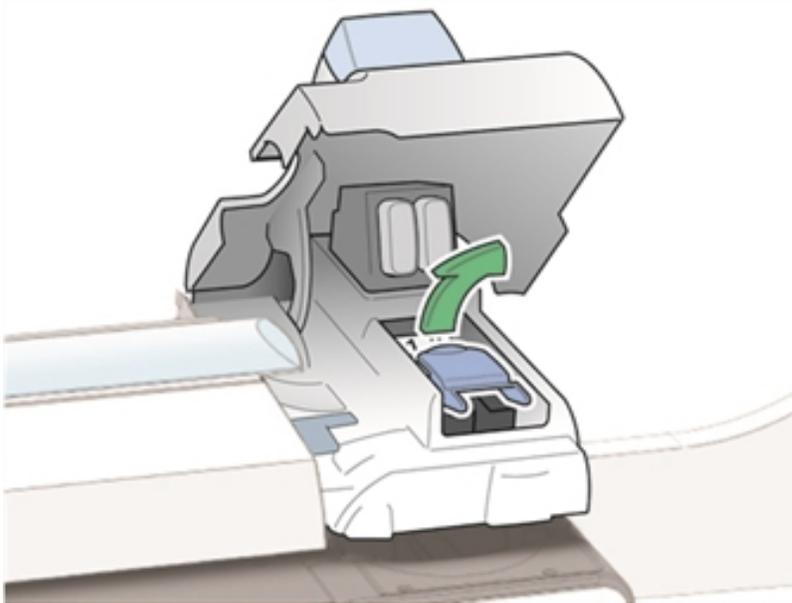
## Replacing the print heads

If you have cleaned the print head and changed the ink cartridge and the print quality of the test sample is still not satisfactory, replace the print head.

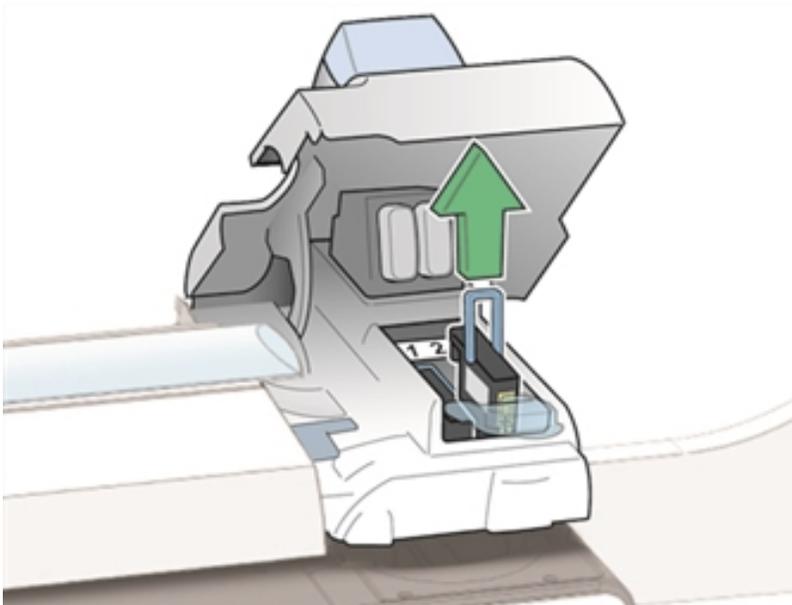
1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Hardware**.
3. Select **Printer**.
4. Select the **Print head** tab.
5. Select the **Install new...** button.
6. Open the printer cover.



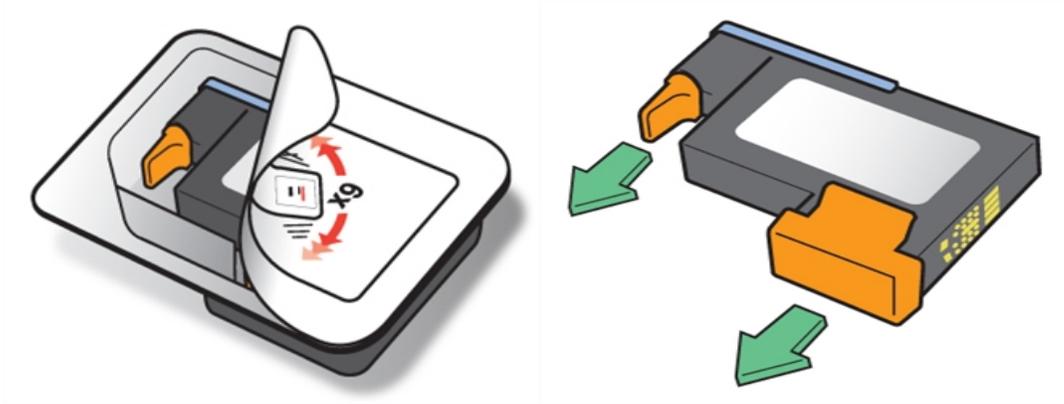
7. Pull the blue latch all the way forward until it stops.



8. Lift the blue print head handle up to a vertical position and then lift the print head straight up and out.

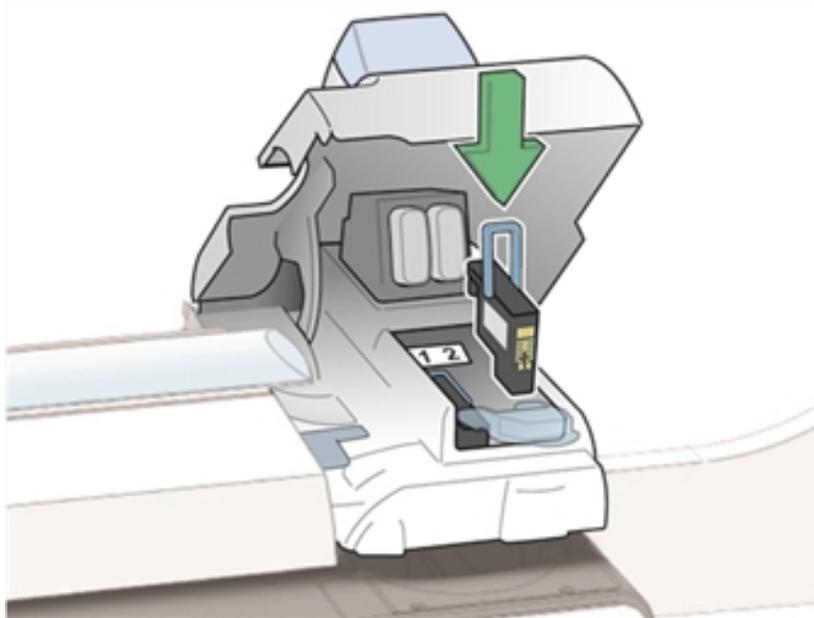


9. Remove the new print head from its packaging. Shake the print head three times.

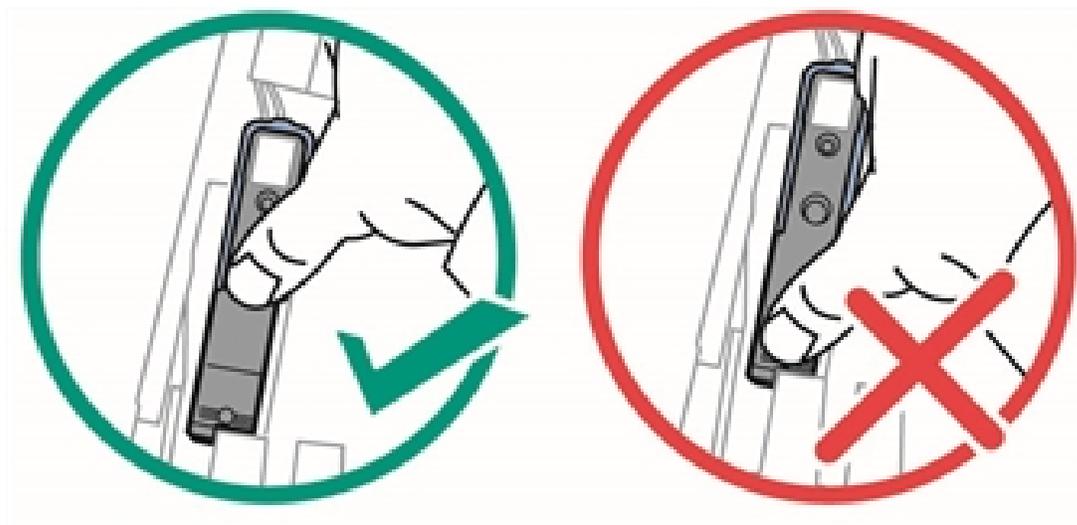


10. Insert the new print head.

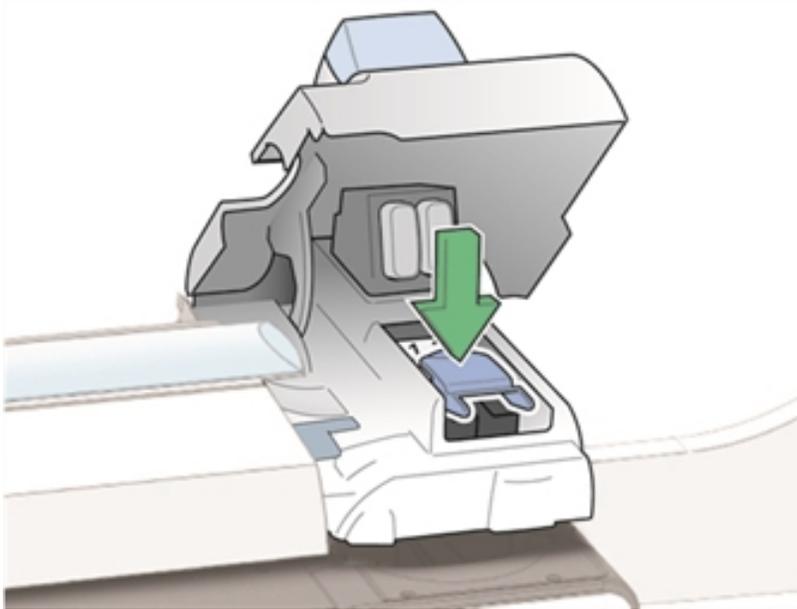
- The print head contact must be facing toward the front of the mailing system.
- Make sure the blue handle is down.



- During installation, only apply pressure to the center of the print head.



11. Push the blue latch back until it stops.



12. Close the printer cover. The system will begin to prepare the print head. This process may take several minutes.
13. Once the print head preparation is complete, you will be prompted to print a test pattern on an envelope. Place an envelope on the feed deck and select **Start**.
14. Check the test pattern. If the lines are solid and unbroken, the pattern is acceptable. Select **Image is OK - Done**.

## Aligning the print heads

If your system has a color printing module, you should perform a print head alignment after you replace the print heads. The print head alignment can be done for both envelope and tape, envelope only or tape only.

You will need four or more envelopes of the same size to perform an envelope alignment.

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **Hardware**.
3. Select **Printer**.
4. Select the **Print head** tab.
5. Select the **Align** button. The Align Print Head screen appears.
6. Select the media type to align: **Envelope and tape**, **Envelope only**, or **Tape only**.

The alignment process varies, depending upon the media type you select. Follow the steps in the appropriate section to continue with the alignment process.

### Envelope and tape alignment

1. Type in the length of your envelope.
  - a. Use the **+** and **-** buttons to adjust the length measurement. The minimum and maximum lengths allowed are displayed on the screen.
  - b. Select **Next** to continue.
2. Select the location on the envelope where most full color graphics are printed.

*Do not change this setting unless instructed to do so.*

- Select **Left** if most full color graphics are printed as part of the return address.
- Select **Center (recommended)** if most full color graphics are printed as part of a graphic or text message.
- Select **Right** if most full color graphics are printed as part of a permit.

Select **Next** to continue.

3. Place an envelope on the feed deck and select **Start** to print the vertical test pattern.

4. Select the **Pattern number:** field.
  - a. Type in the number of the best aligned pattern.
  - b. Select **OK**.
  - c. Select **Next** to continue.
5. Repeat steps 3 and 4 to print the second vertical test pattern.
6. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on envelopes. Select **Next** to continue to the horizontal alignment.
7. Place an envelope on the feed deck and select **Start** to print the first horizontal test pattern.
8. Select the **Pattern number:** field.
  - a. Type in the number of the best aligned pattern.
  - b. Select **OK**.
  - c. Select **Next** to continue.
9. Repeat steps 7 and 8 to print the second horizontal test pattern.
10. If the alignment was successful, a message appears indicating that the print heads have been horizontally aligned to print on envelopes. Select **Next** to continue to the tape alignment.
11. Select **Tape** to print the first vertical test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
12. Repeat step 11 to print the second vertical test pattern.
13. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on tape. Select **Next** to continue to the horizontal alignment.
14. Select **Tape** to print the first horizontal test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
15. Repeat step 14 to print the second horizontal test pattern.

16. If the alignment was successful, a message appears indicating that the print heads have been aligned to print on envelopes and tape. Select **Done**.

### Envelope alignment only

1. Type in the length of your envelope.
  - a. Use the **+** and **-** buttons to adjust the length measurement. The minimum and maximum lengths allowed are displayed on the screen.
  - b. Select **Next** to continue.

2. Select the location on the envelope where most full color graphics are printed.

*Do not change this setting unless instructed to do so.*

- Select **Left** if most full color graphics are printed as part of the return address.
- Select **Center (recommended)** if most full color graphics are printed as part of a graphic or text message.
- Select **Right** if most full color graphics are printed as part of a permit.

Select **Next** to continue.

3. Place an envelope on the feed deck and select **Start** to print the vertical test pattern.
4. Select the **Pattern number:** field.
  1. Type in the number of the best aligned pattern.
  2. Select **OK**.
  3. Select **Next** to continue.
5. Repeat steps 3 and 4 to print the second vertical test pattern.
6. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on envelopes. Select **Next** to continue to the horizontal alignment.
7. Place an envelope on the feed deck and select **Start** to print the first horizontal test pattern.
8. Select the **Pattern number:** field.
  - a. Type in the number of the best aligned pattern.
  - b. Select **OK**.
  - c. Select **Next** to continue.
9. Repeat steps 7 and 8 to print the second horizontal test pattern.

10. If the alignment was successful, a message appears indicating that the print heads have been aligned to print on envelopes. Select **Done**.

### **Tape alignment only**

1. Select **Tape** to print the first vertical test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
2. Repeat step 1 to print the second vertical test pattern.
3. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on tape. Select **Next** to continue to the horizontal alignment.
4. Select **Tape** to print the first horizontal test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
5. Repeat step 4 to print the second horizontal test pattern.
6. If the alignment was successful, a message appears indicating that the print heads have been aligned to print on tape. Select **Done**.

## Turning off spot black (#2) printing

If the spot black (#2) ink cartridge is out of ink, a special Out of Ink warning will appear indicating that printing mail has been disabled to avoid damage to the system.

You can turn spot black (#2) printing off, and can continue to print mail for 14 days. When the period expires you will need to reactivate spot black (#2) printing by installing a new ink cartridge.

---

### Note:

If you do not install a new ink cartridge spot black (#2) printing will be disabled permanently. If you choose to permanently disable spot black (#2) printing, you can continue to print your mail. However, a customer care representative will need to install a new printing system at a cost to you if you wish to use spot black (#2) printing in the future.

---

To turn off spot black (#2) printing:

1. Select **Turn off spot black (#2) ink printing** when the Out of Ink warning appears. If the "out of spot (#2) ink" warning error appears on the Run Mail screen, select **Turn off spot printing** to view the Out of Ink warning.
2. Review the terms and conditions.
  - a. Select **I have read and agree with these conditions**.
  - b. Select **Yes, turn black ink printing off**.
3. A warning appears indicating that your system needs to be reconfigured to turn off spot black (#2) printing. Select **Yes, proceed**.
4. Follow the prompts to remove the ink cartridge and reconfigure the system.
5. Once the system has been reconfigured, you will be prompted to print test patterns on tape. Select **Ready**.
6. Select **Tape**.

7. Check the test pattern.

- If the solid lines of the test sample are unbroken, select **Image is OK - Done**.
- If the test sample has missing or incomplete lines, select **Not OK - Clean print head**. Once the cleaning operation completes, you will be prompted to print another test sample. If the pattern still has broken or missing lines, you may need to replace the ink cartridge or print head.

Once the test pattern has been approved, an alert message will appear on the Run Mail screen indicating that you have 14 days to reactivate spot black (#2) ink. In addition, a similar warning will appear on the Home screen each time you power up the system.

## Reactivating spot black (#2) printing

While the spot black (#2) grace period is active, the status bar on the Run Mail screen will display an alert with the option to reactivate spot black (#2) printing.

Spot black (#2) printing can only be reactivated from the Run Mail screen.

1. Select **Reactivate Spot K**.
2. Select **Yes, proceed**.
3. Follow the prompts to install the ink cartridge and reconfigure the system.



### Warning!

Do not open any covers unless prompted to do so. Opening covers out of turn or otherwise interfering with the system will result in a series of error messages that may require the system to be restarted.

---

4. Once the system has been reconfigured, you will be prompted to print test patterns on tape. Select **Ready**.
5. Select **Tape**.
6. Check the test pattern.
  - If the solid lines of the test sample are unbroken, select **Image is OK - Done**.
  - If the test pattern has missing or incomplete lines, select **Not OK - Clean print head**. Once the cleaning operation completes, you will be prompted to print another test pattern. If the pattern still has broken or missing lines, you may need to replace the ink cartridge or print head.

# 14 - Troubleshooting

## In this section

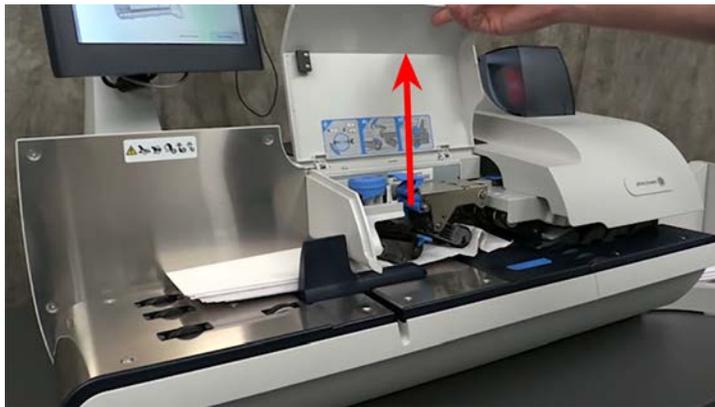
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## Clearing the mail piece path on your SendPro® P1000

This procedure describes the correct method for clearing a stoppage or envelope jam on your SendPro® P1000 system.

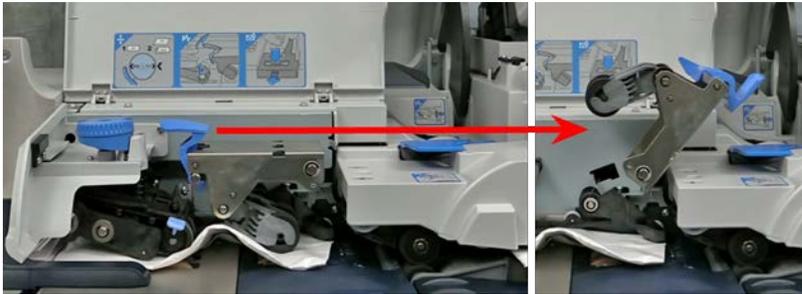
1. Lift the feed cover.



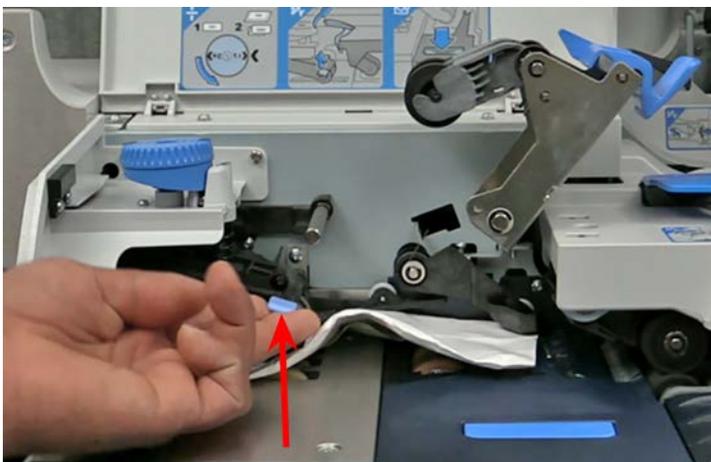
2. Lift the print cover.



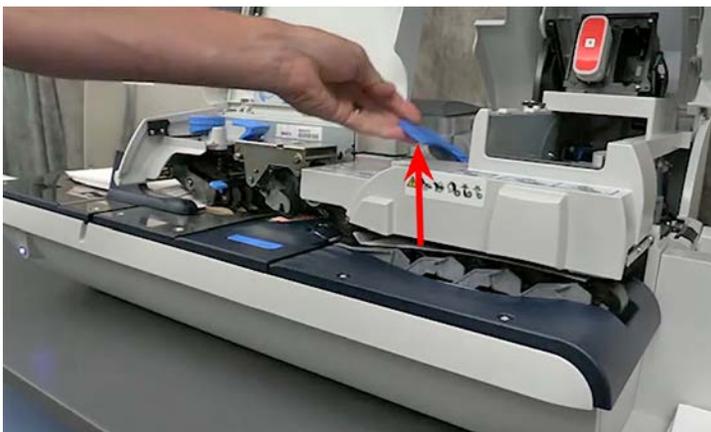
3. Pull up on the top release lever.



4. Lift up the lower release lever and remove the mailpiece.



5. Close the top release lever.
6. Lift up the printer transport release lever.



7. Make sure the printer deck is clear.



8. Push the printer transport release lever down.
9. Make sure all release levers are down and snapped back into place.

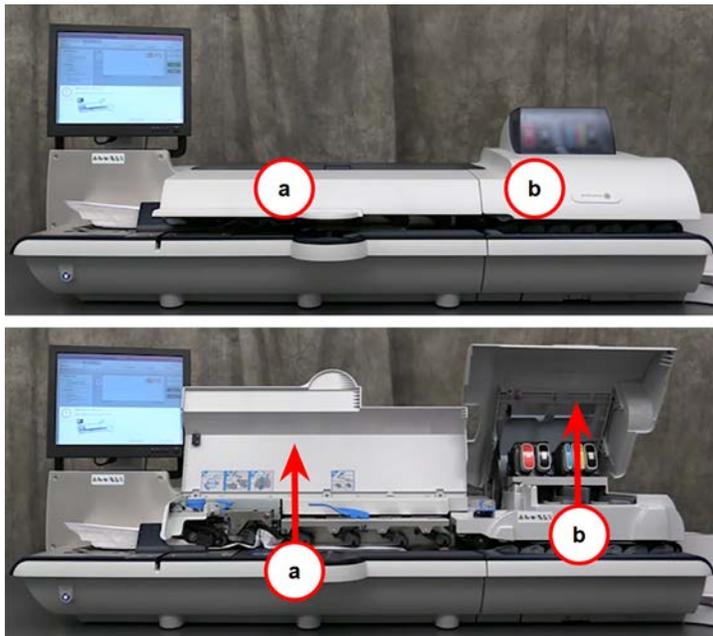


10. Close all covers and resume printing.

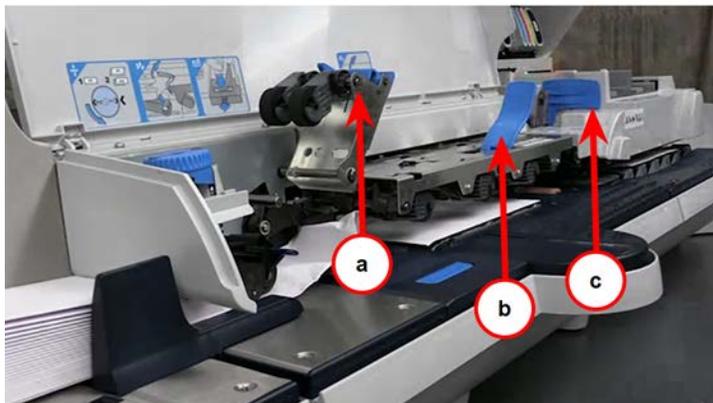
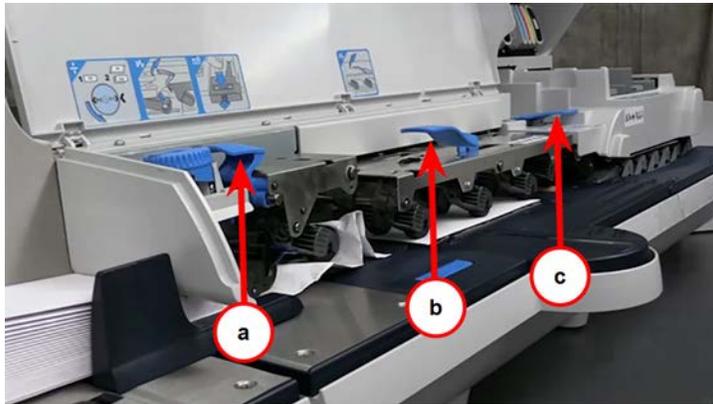
## Clearing the mail piece path on your SendPro® P1500 / SendPro® P2000

This procedure describes the correct method for clearing a stoppage or envelope jam on your SendPro® P2000 but is very similar to the SendPro® P1500 system.

1. Lift the (a) feeder W-O-W transport cover and the (b) printer cover.



2. Pull up on the (a) top release lever, the (b) W-O-W transport release lever, and the (c) printer transport release lever.



3. Remove any mail pieces from the W-O-W transport and printer transport area.
4. Lift up the lower release lever and remove the mail piece.



5. Push all release levers down and make sure they snap into place.

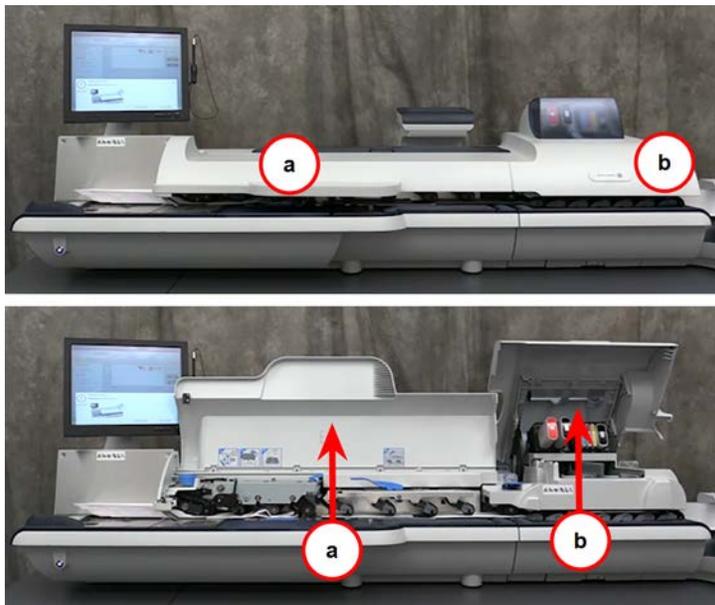


6. Close all covers and resume printing.

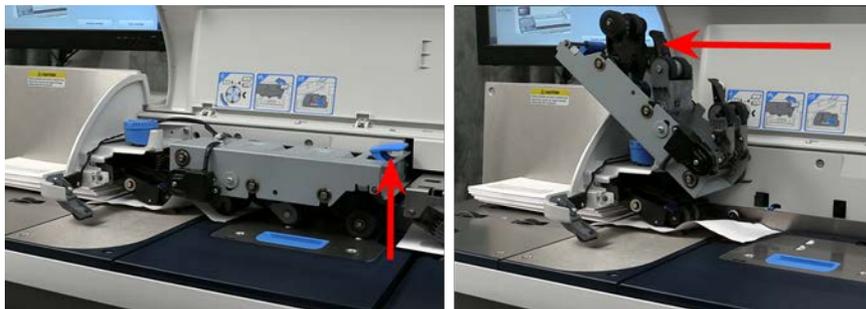
## Clearing the mail piece path on your SendPro® P3000

This procedure describes the correct method for clearing a stoppage or envelope jam on your SendPro® P3000 system.

1. Lift the (a) feeder W-O-W transport cover and the (b) printer cover.



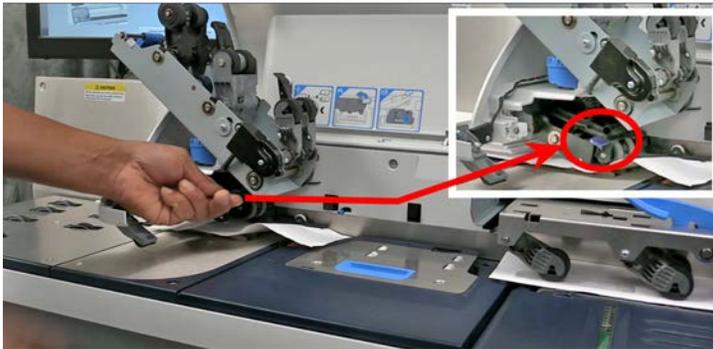
2. Pull up and to the left on the top release lever.



3. Lift up on the (a) W-O-W transport release lever and the (b) printer transport release lever.



4. Remove any mail pieces from the W-O-W transport and printer transport area.
5. Lift up the lower release lever and remove the mail piece.



6. Push all release levers down and make sure they snap into place.

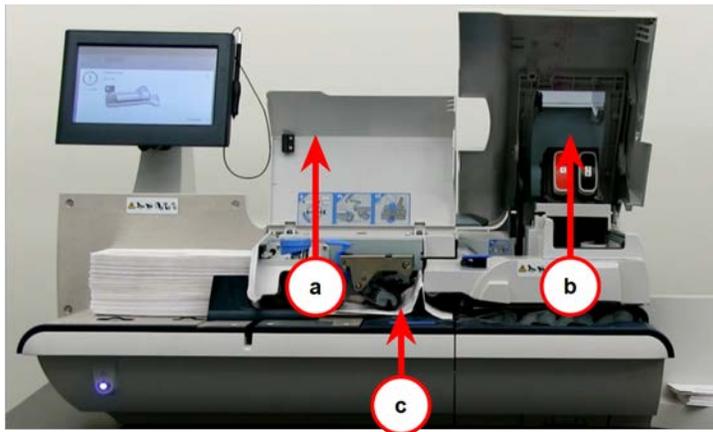


7. Close all covers and resume printing.

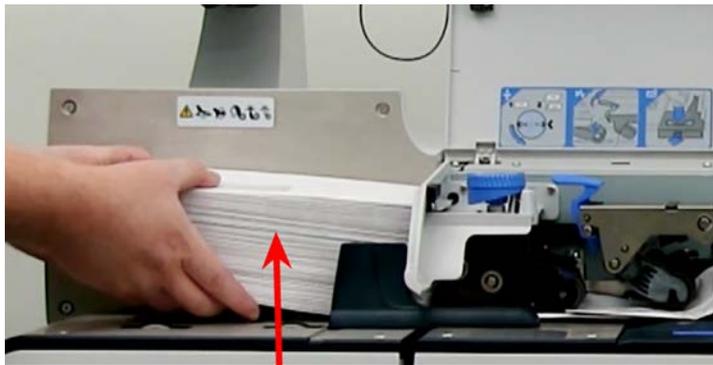
## Paper Path Maintenance on your SendPro® P1000

If you experience envelope stoppage on your SendPro® P1000 system, follow the steps here to clear the stoppage and perform the recommended maintenance operations to prevent further stoppages.

1. Lift the (a) feed cover and the (b) printer cover and locate the stoppage (c).



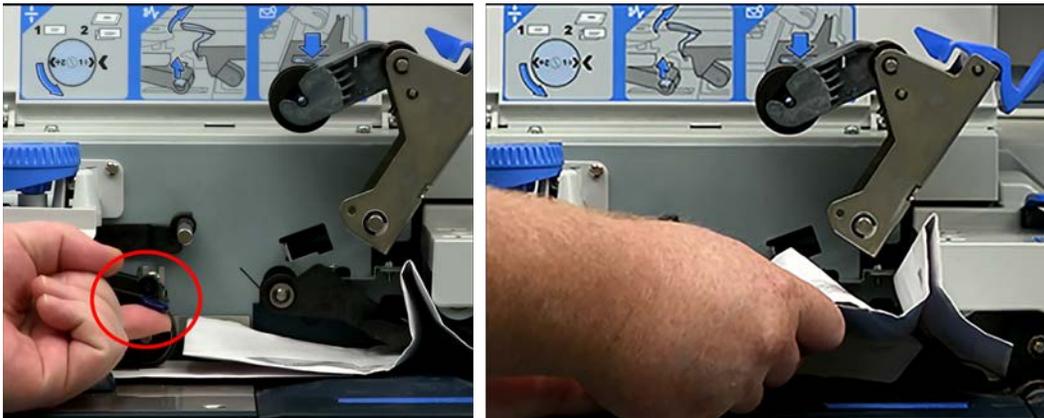
2. Remove the envelopes from the feed deck.



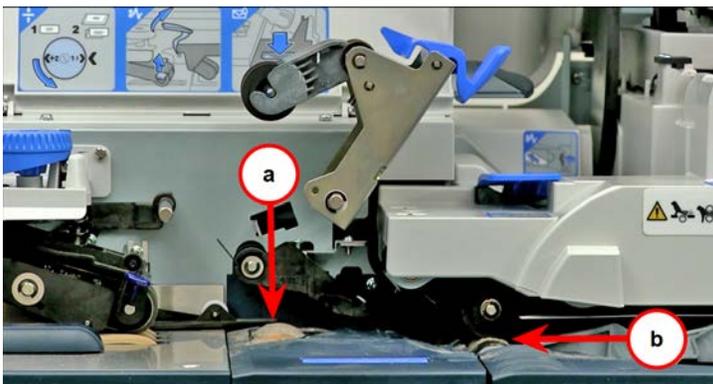
3. Pull the top release lever up and to the right.



4. Lift up on the lower release lever with one hand and remove the envelope with the other.



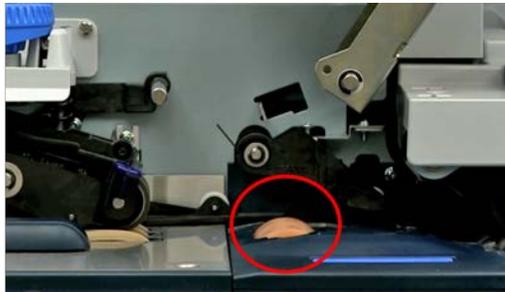
5. Examine the (a) sealer roller and (b) printer entrance roller for dirt and gunk.



6. Fill a water-spray bottle and spray water on a lint free cloth.



7. Wipe any dirt or gunk off the sealer roller.



8. Close the top release lever and lock in place.



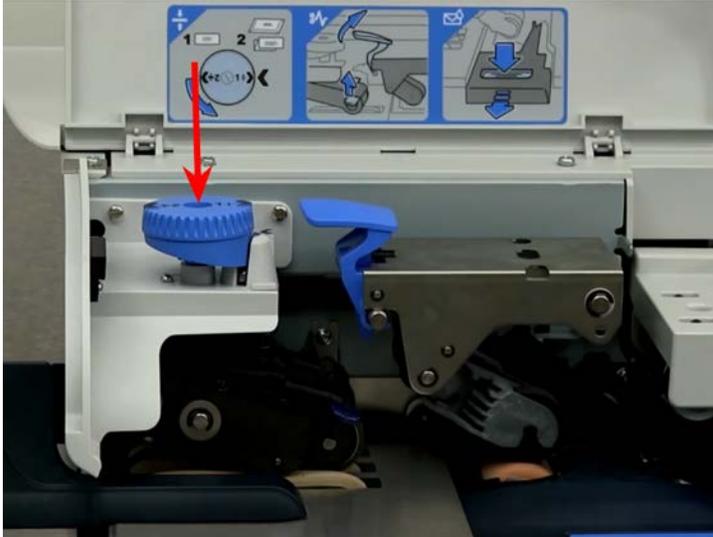
9. Lift up the printer transport release lever and push to the right.



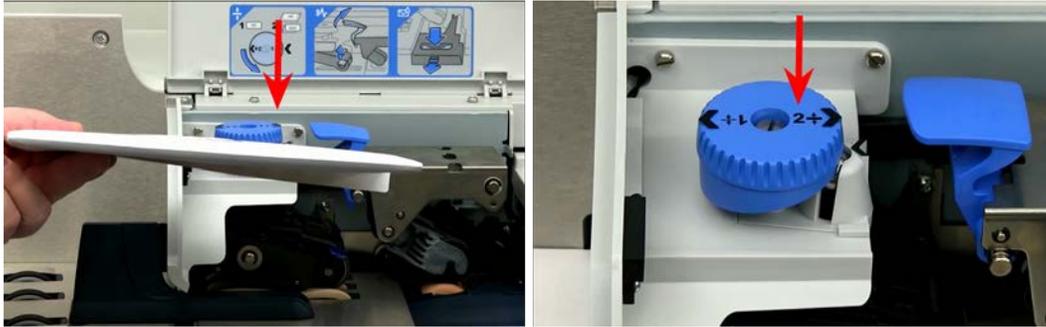
10. Remove any envelopes from the printer deck and wipe the printer entrance roller and printer deck clean using another damp lint-free cloth.



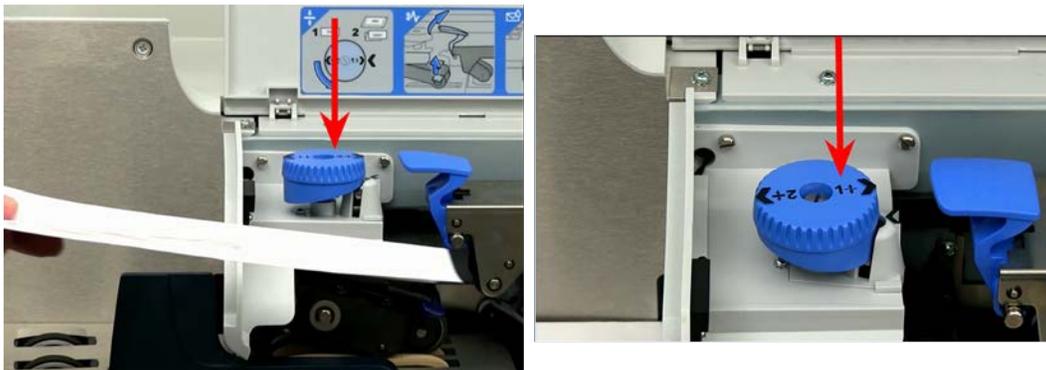
11. Set the thickness adjustment knob.



- a. For thicker mail pieces that are greater than .375 inches (9.52 mm) to the maximum of 0.625 inches (15.9 mm) thick, use a setting of **2**.

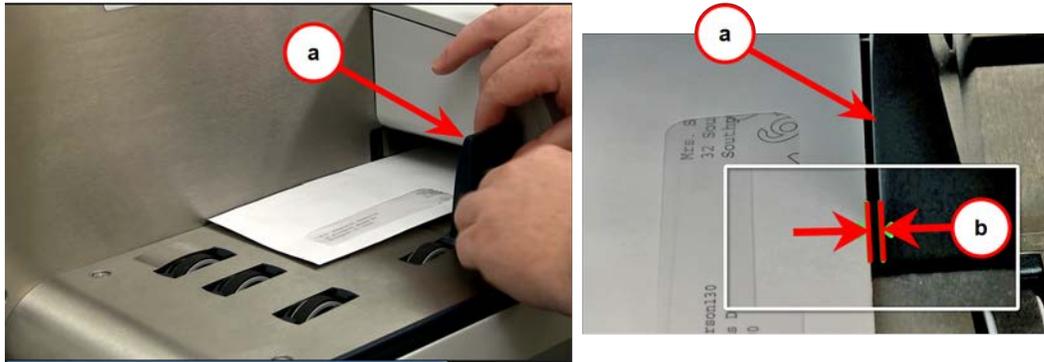


- b. For postcards and mail pieces that are 0.007 inches (0.18 mm) to 0.375 inches (9.52 mm) thick, use a setting of **1**.

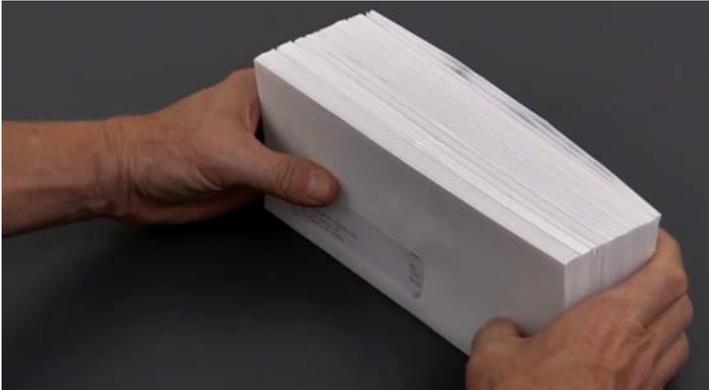


12. Close the feed and printer covers.

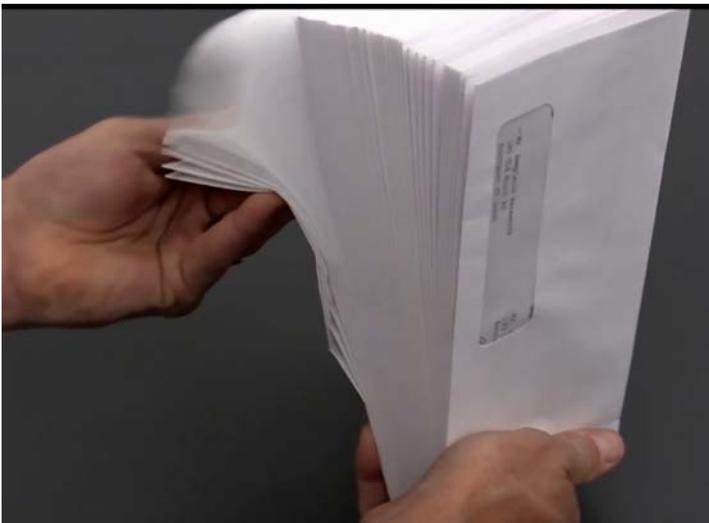
13. Adjust the (a) side guide on the feeder deck to accommodate the width of the envelope. The space between the envelope and side guide should be approximately (b) 1/16 inch (1.59 mm).



14. Prepare the envelopes for the feed deck.
  - a. Make sure all the envelopes are the same size for a mail run.
  - b. Align the stack of envelopes by tapping the stack on a flat surface.



- c. Fan the envelope stack.



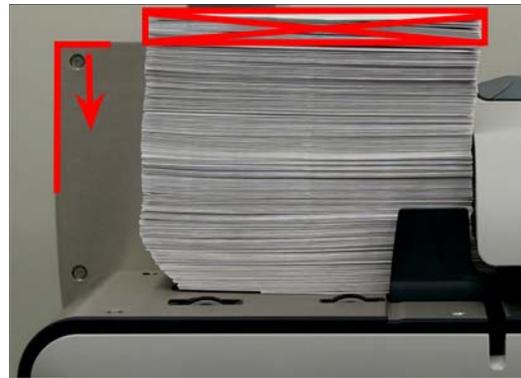
- d. Shingle the stack (slant as shown).



- e. Place the stack on the feed deck with the envelope flaps down and against the rear wall. Make sure the stack is not too high.



**Correct**

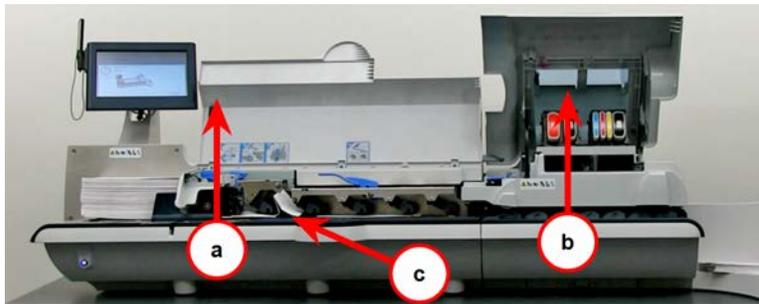


**Incorrect**

## Paper Path Maintenance on your SendPro® P1500 / SendPro® P2000

If you experience envelope stoppage on your SendPro® P2000 SendPro® P1500system, follow the steps here to clear the stoppage and perform the recommended maintenance operations to prevent further stoppages.

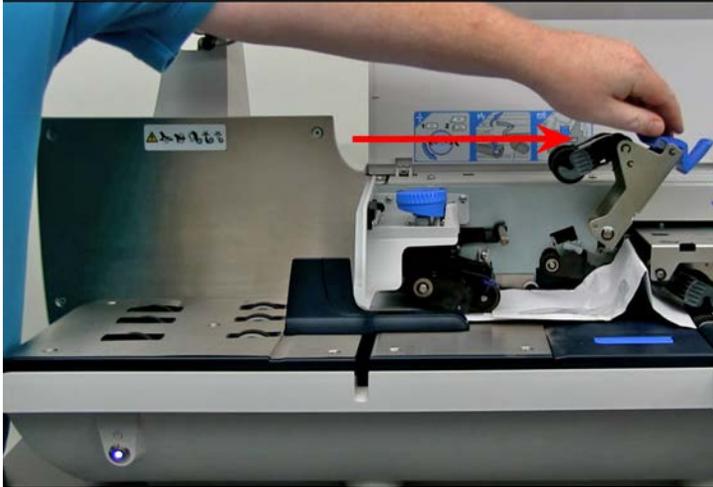
1. Lift the (a) feed cover and the (b) printer cover and locate the stoppage (c).



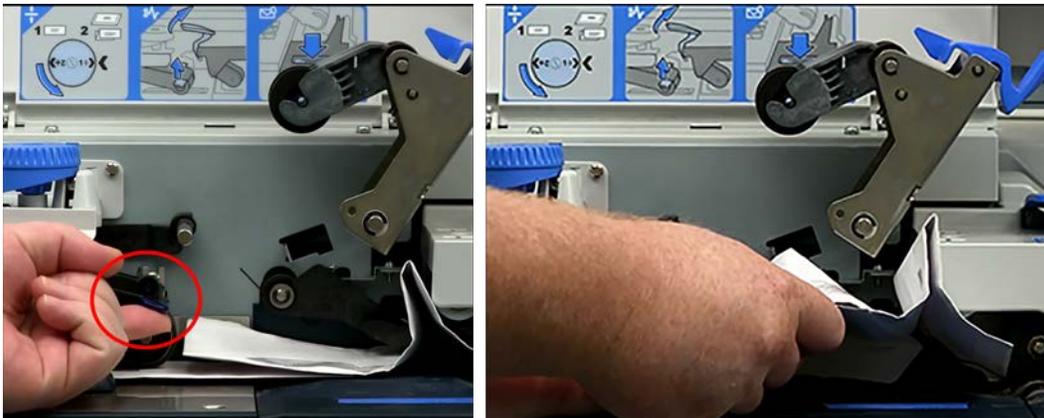
2. Prepare the envelopes for the feed deck.



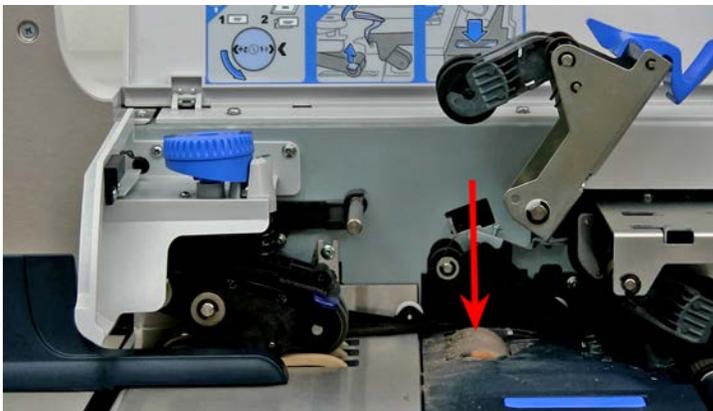
3. Pull the top release lever up and to the right.



4. Lift up on the lower release lever with one hand and remove the envelope with the other.



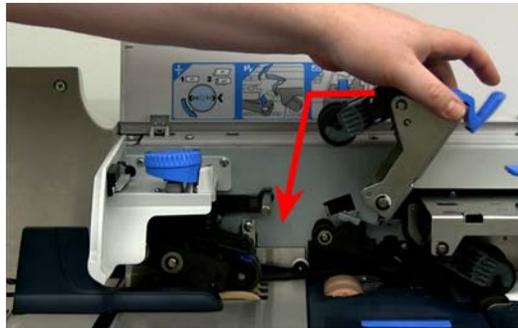
5. Examine the sealer roller for dirt and gunk.



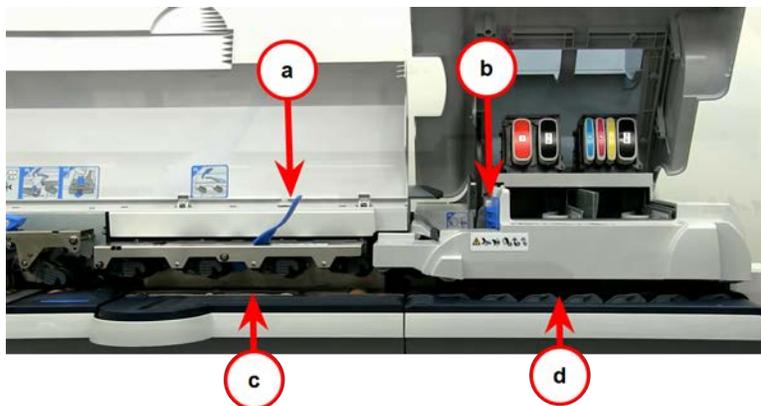
6. Fill a water-spray bottle and spray water on a lint free cloth.



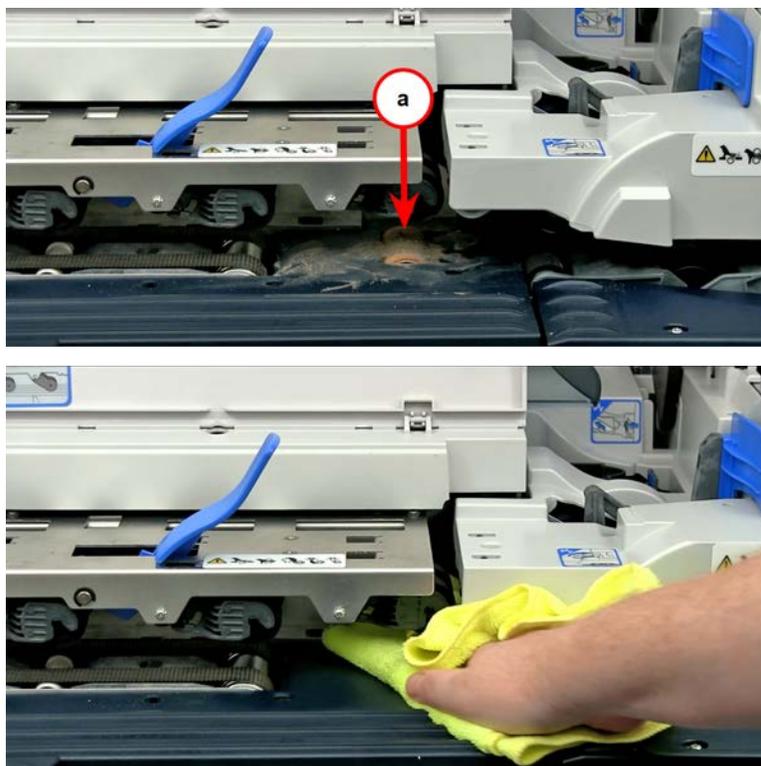
7. Wipe any dirt or gunk off the sealer roller and then close the top release lever and lock it in place.



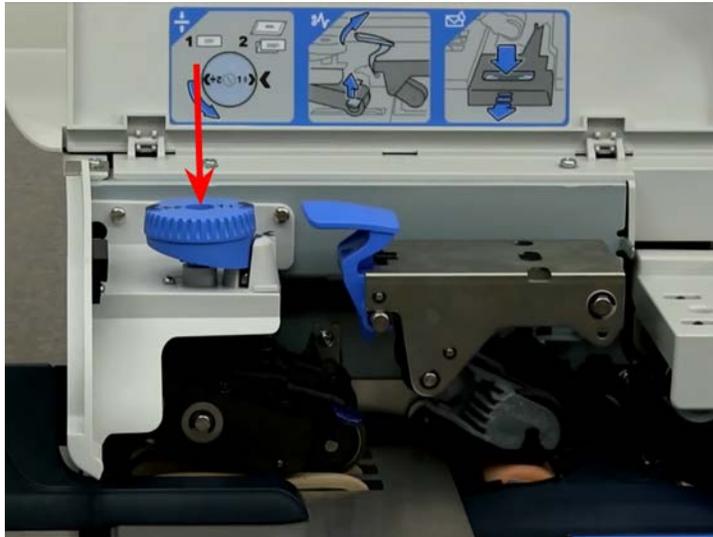
- Lift up on the (a) W-O-W transport release lever and the (b) printer transport release lever and remove any envelopes from the (c) W-O-W and (d) printer decks.



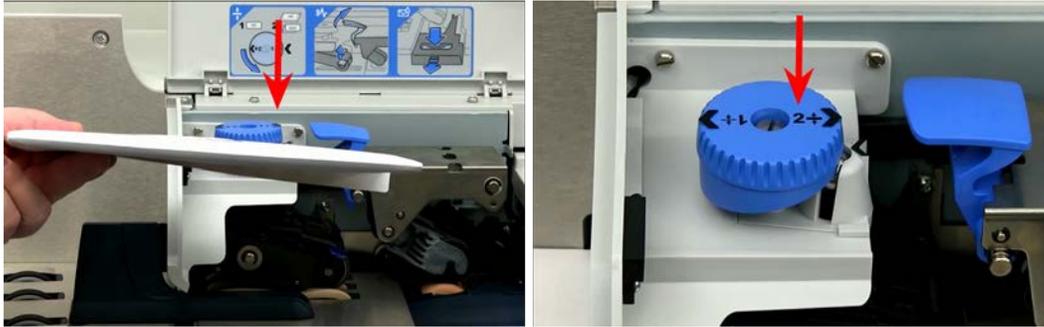
- Using another damp lint-free cloth clean the (a) printer entrance roller. Use the cloth to wipe down the W-O-W and printer decks.



10. Set the thickness adjustment knob.



- a. For thicker mail pieces that are greater than 0.375 inches (9.52 mm) to the maximum of 0.625 inches (15.9 mm) thick, use a setting of **2**.

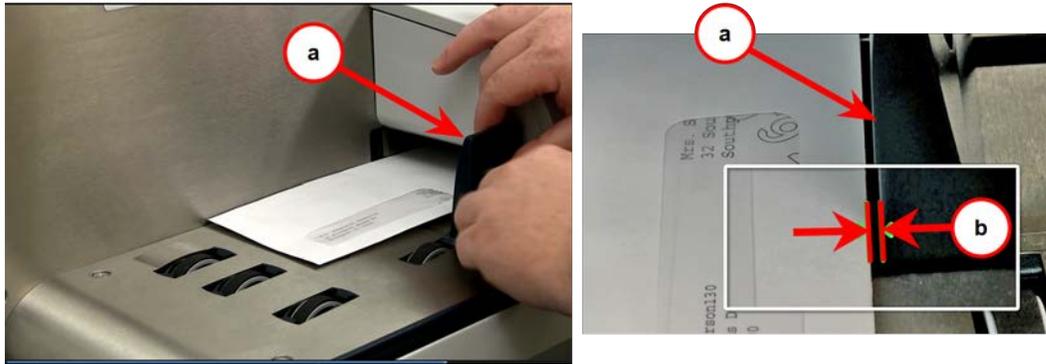


- b. For postcards and mail pieces that are 0.007 inches (0.18 mm) to 0.375 inches (9.52 mm) thick, use a setting of **1**.

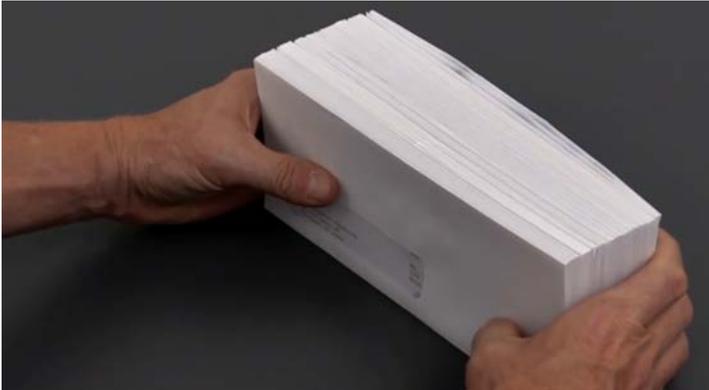


11. Close the feed and printer covers.

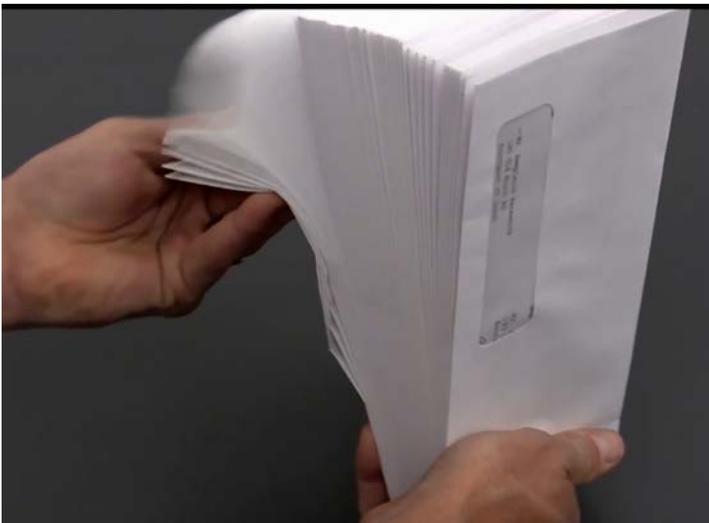
- Adjust the (a) side guide on the feeder deck to accommodate the width of the envelope. The space between the envelope and side guide should be approximately (b) 1/16 inch (1.59 mm) .



13. Prepare the envelopes for the feed deck.
  - a. Make sure all the envelopes are the same size for a mail run.
  - b. Align the stack of envelopes by tapping the stack on a flat surface.



- c. Fan the envelope stack.



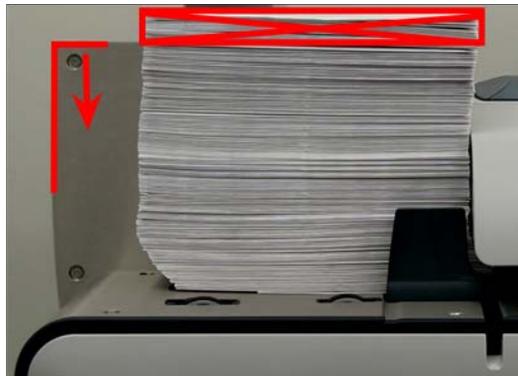
- d. Shingle the stack (slant as shown).



- e. Place the stack on the feed deck with the envelope flaps down and against the rear wall. Make sure the stack is not too high.



**Correct**

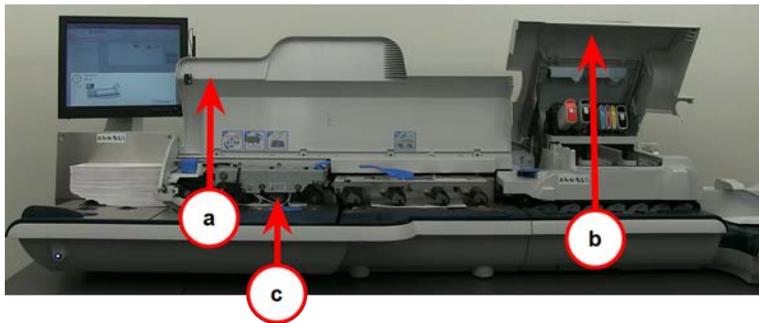


**Incorrect**

## Paper Path Maintenance on your SendPro® P3000

If you experience envelope stoppage on your SendPro® P3000 system, follow the steps here to clear the stoppage and perform the recommended maintenance operations to prevent further stoppages.

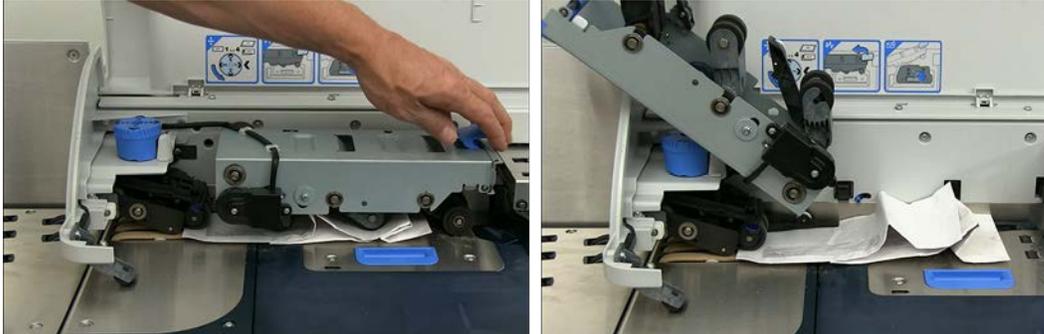
1. Lift the (a) feed cover and the (b) printer cover and locate the stoppage (c).



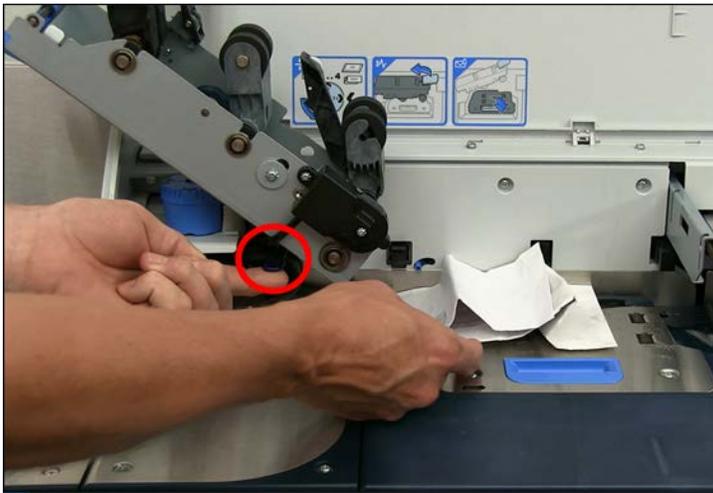
2. Prepare the envelopes for the feed deck.



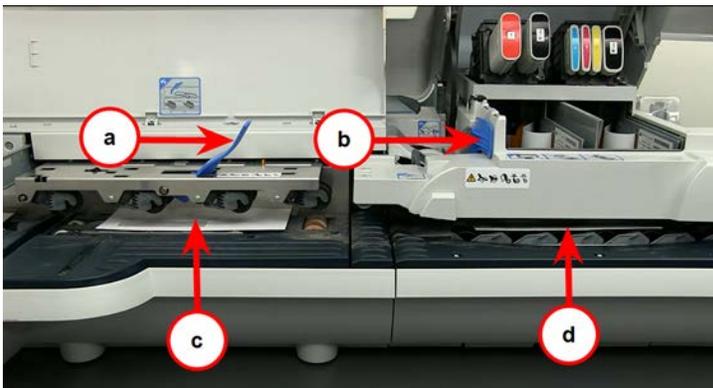
3. Pull the top release lever up and to the left.



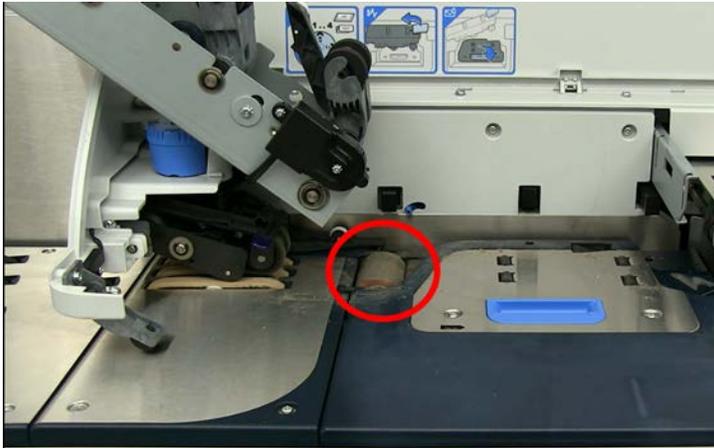
4. Lift up on the lower release lever with one hand and remove the envelope with the other.



5. Lift up the (a) W-O-W transport release lever and the (b) printer transport release lever and remove any envelopes from the (c) W-O-W and (d) printer decks.



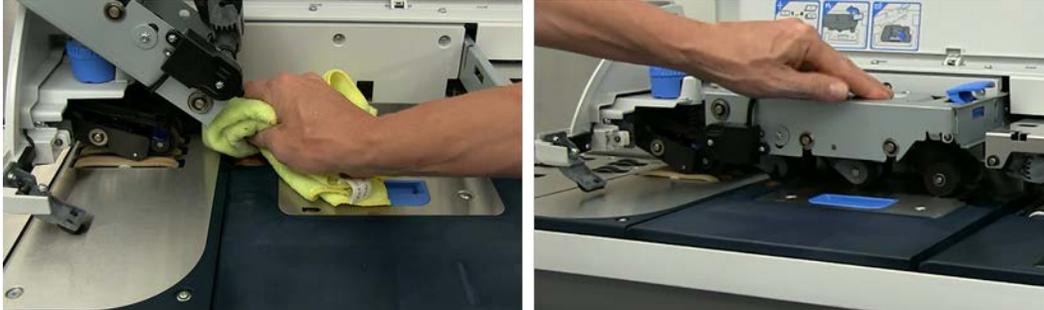
6. Examine the sealer roller for dirt and gunk.



7. Fill a water-spray bottle and spray water on a lint free cloth.



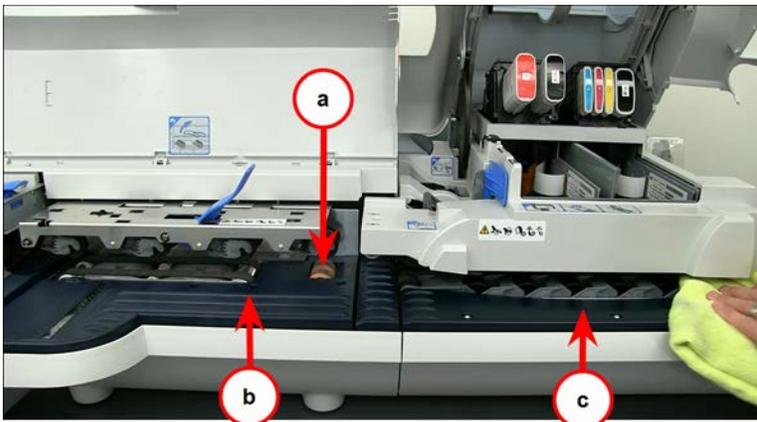
8. Wipe any dirt or gunk off the sealer roller and feed deck. Close the top release lever and lock it in place.



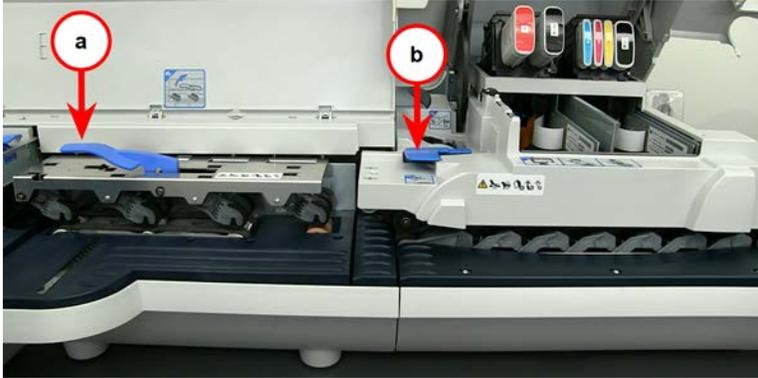
9. Spray water on a fresh lint-free cloth.



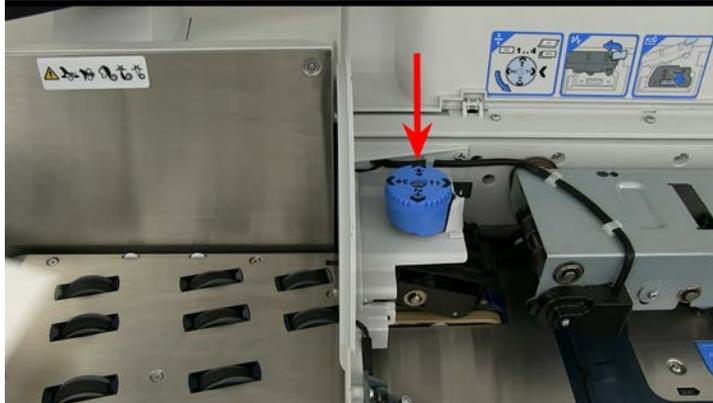
10. Clean the (a) printer entrance roller and the (b) W-O-W and (c) printer decks.



11. Close the (a) W-O-W transport release lever and the (b) printer transport lever.



12. Set the thickness adjustment knob.



- a. For mail pieces that are greater than or equal to 0.50 inches (12.7 mm) thick, but less than 0.748 inches (18.9 mm) thick, use a setting of **3**.



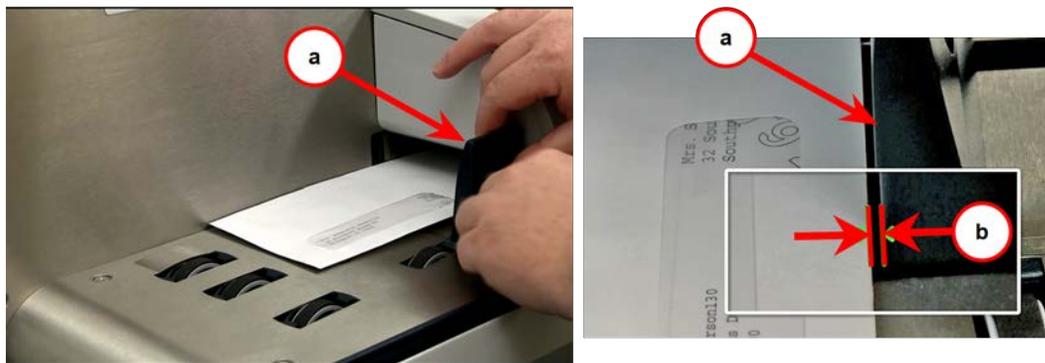
- b. For postcards and mail pieces that are 0.007 inches (0.18 mm) to 0.375 inches (9.52 mm) thick, use a setting of **1**.



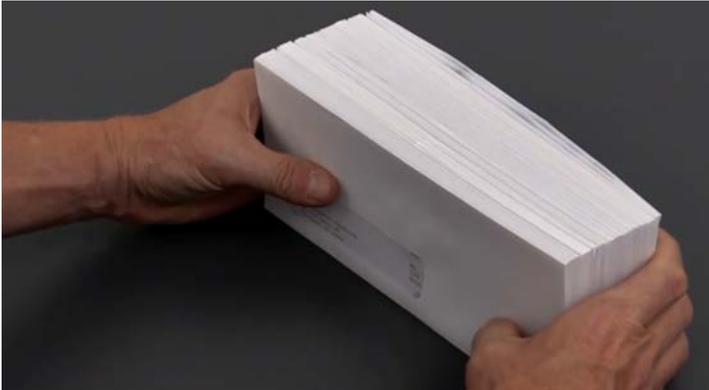
- c. For mail pieces that are greater than or equal 0.25 inches (6.35 mm) thick, but less than 0.50 inches (12.7 mm) thick, use a setting of **2** (not shown).
- d. For mail pieces that are greater than or equal to 0.50 inches (12.7 mm) thick, but less than 0.748 inches (18.9 mm) thick, use a setting of **4** (not shown).

13. Close the feed and printer covers.

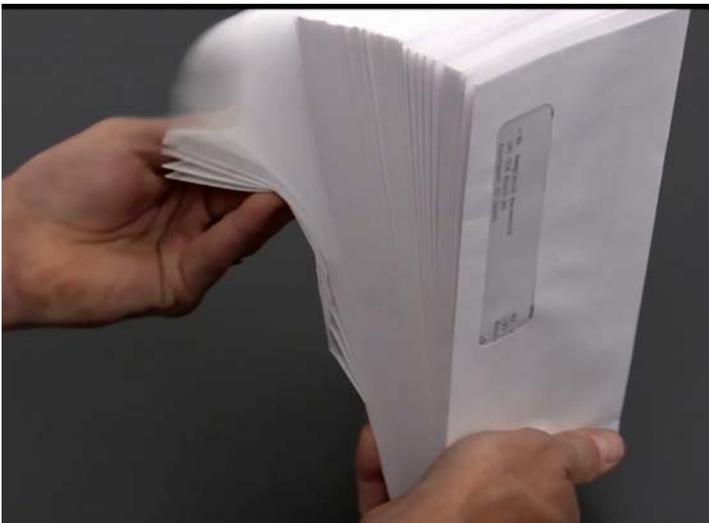
14. Adjust the (a) side guide on the feeder deck to accommodate the width of the envelope. The space between the envelope and side guide should be approximately (b) 1/16 inch (1.59 mm).



15. Prepare the envelopes for the feed deck.
  - a. Make sure all the envelopes are the same size for a mail run.
  - b. Align the stack of envelopes by tapping the stack on a flat surface.



- c. Fan the envelope stack.



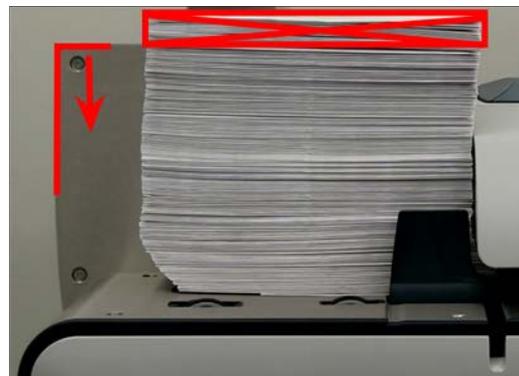
- d. Shingle the stack (slant as shown).



- e. Place the stack on the feed deck with the envelope flaps down and against the rear wall. Make sure the stack is not too high.



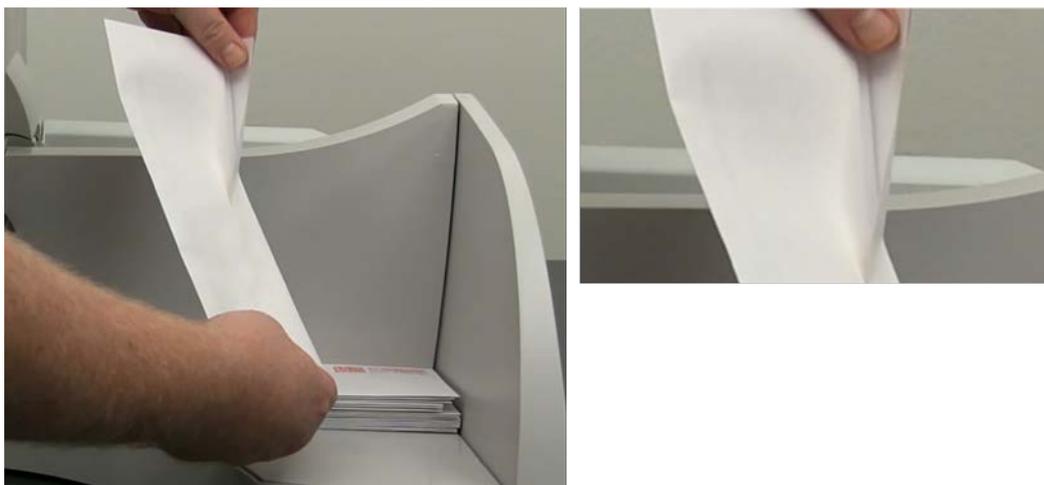
**Correct**



**Incorrect**

## Sealer Maintenance on your SendPro® P1000

If your envelope(s) are not sealing or not sealing properly, perform the recommended maintenance operations here. In order to complete these operations you will need the Moistener Replacement Kit, 2F3-E.



### Improperly sealed envelope

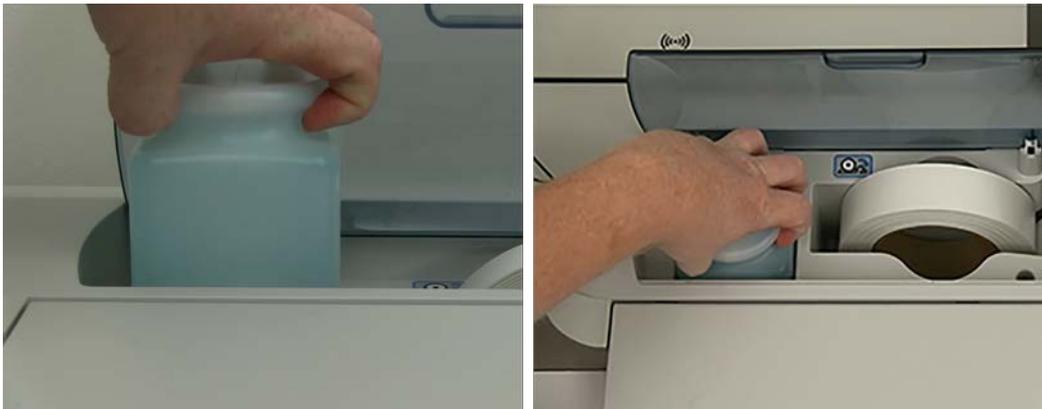
1. Open the supplies cover.



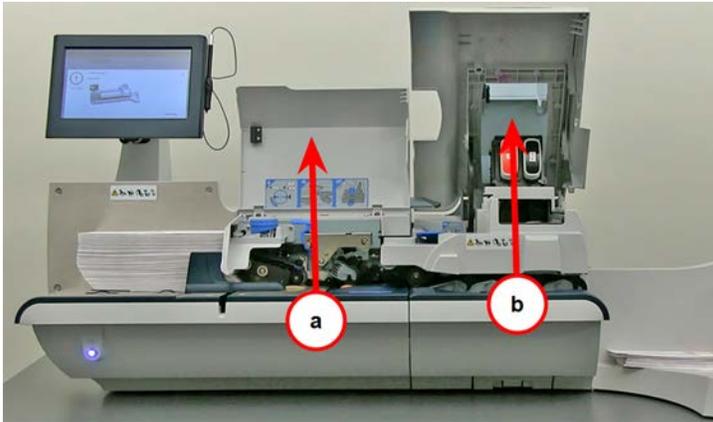
2. The envelope sealant bottle is located to the far left of the tape roll. Check to see if the sealant bottle is seated correctly. The following picture is an example of an improperly seated bottle.



3. To re-seat the sealant bottle, lift it straight up and lower it again as shown in the following picture.



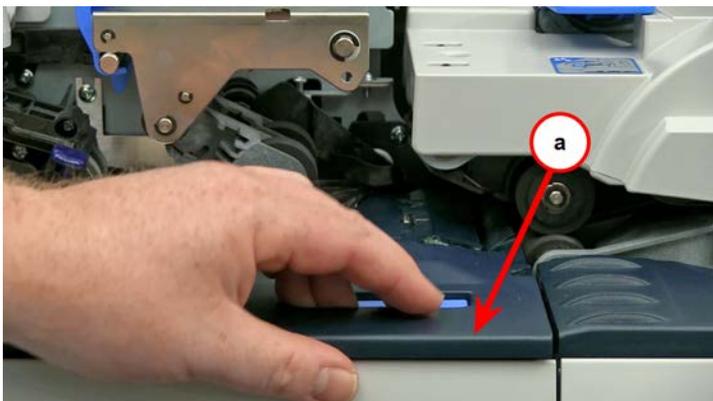
4. Close the supplies cover, then open the (a) feed and (b) print covers.



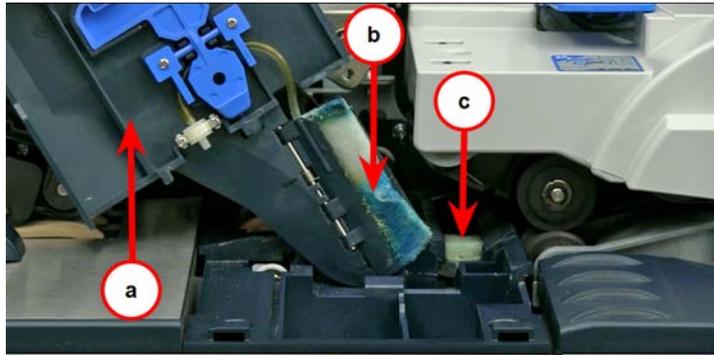
5. Push down on the moistener pad assembly button located on the feed deck.



6. Grasp the (a) moistener pad assembly and pull it out straight toward you.



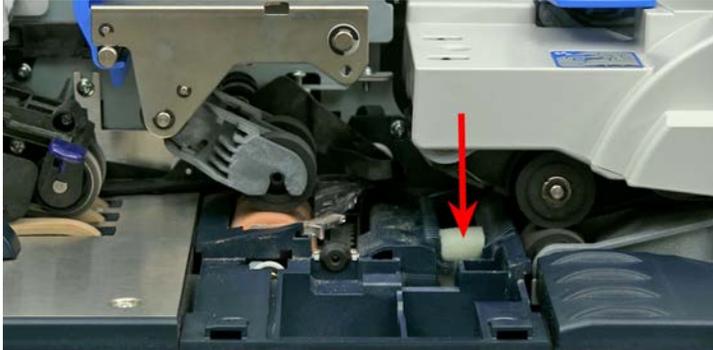
7. Turn the (a) moistener pad assembly over and examine the (b) moisture pad. Note the location of the (c) wick. If the pad contains dirt and gunk and looks like the image shown here, you need to replace the assembly.



8. Using two fingers, grasp and remove the wick.
9. Locate the Moistener Replacement Kit, 2F3-E.



10. Insert the new wick. Gently push it all the way down into the wick holder until it is seated properly.



11. Push the new moistener pad assembly back on its track until it snaps into position.

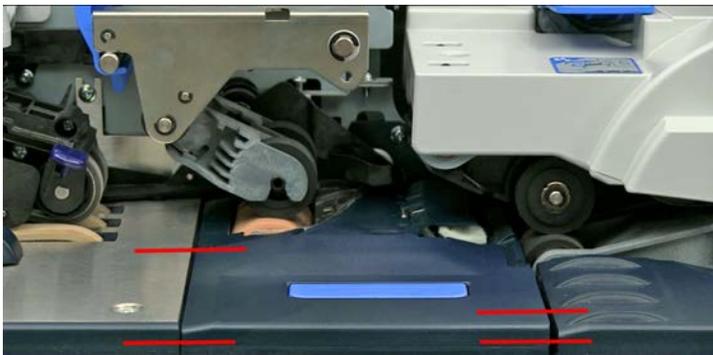


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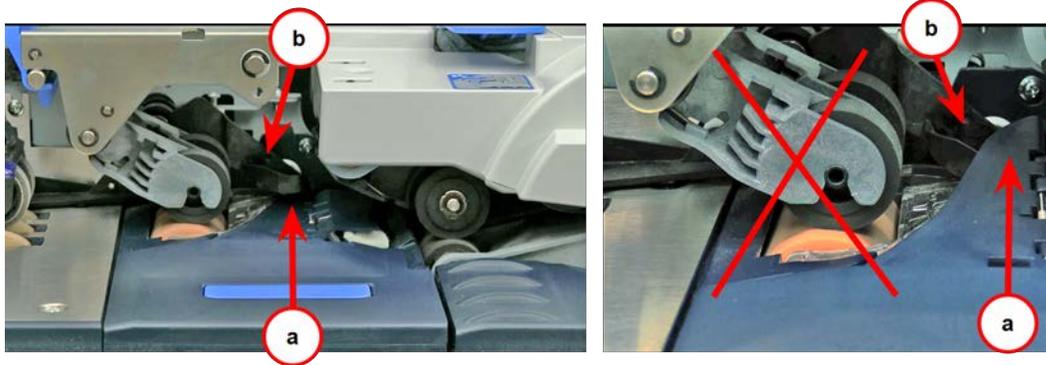
## IMPORTANT !

Make sure that the moistener pad assembly is perfectly level with the feed deck and that the stripper portion of the assembly is under the mail hold down finger.

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**Correct alignment with feed deck**



(a) Stripper on moistener pad assembly is under the (b) mail hold down assembly

The following are examples of improper alignment:



**Incorrect alignment with feed deck**

12. Close the feed and print covers.
13. Run some envelopes and verify they are sealing correctly.

## Sealer Maintenance on your SendPro® P1500 / SendPro® P2000

If your envelope(s) are not sealing or not sealing properly, perform the recommended maintenance operations here. In order to complete these operations you will need the Moistener Replacement Kit, 2F3-E.



### Improperly sealed envelope

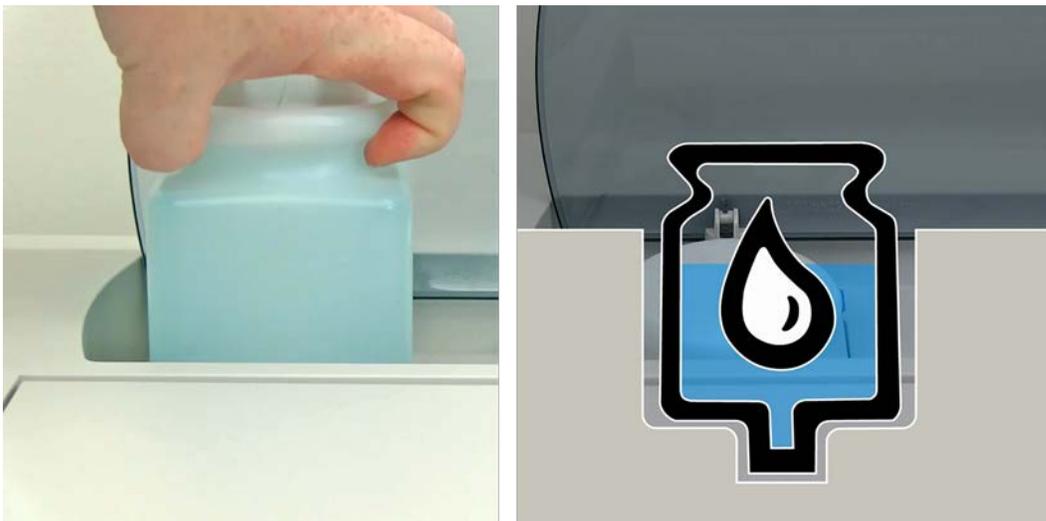
1. Open the supplies cover.



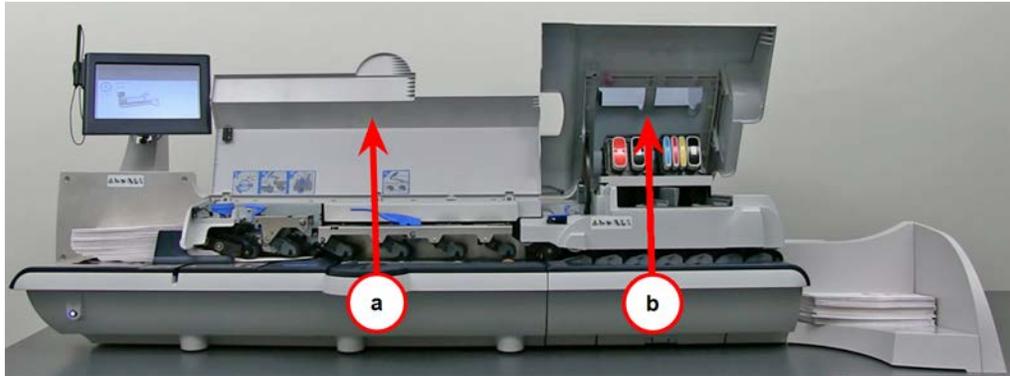
2. The envelope sealant bottle is located to the far left of the tape roll. Check to see if the sealant bottle is seated correctly. The following picture is an example of an improperly seated bottle.



3. To re-seat the sealant bottle, lift it straight up and lower it again so that it is seated properly as shown in the following image.



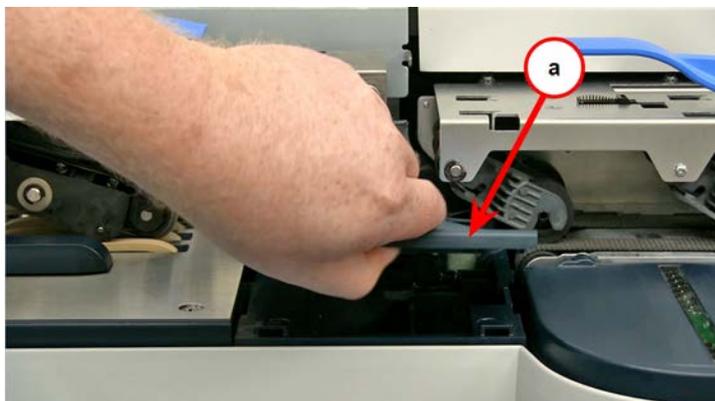
4. Close the supplies cover, then open the (a) feed and (b) print covers.



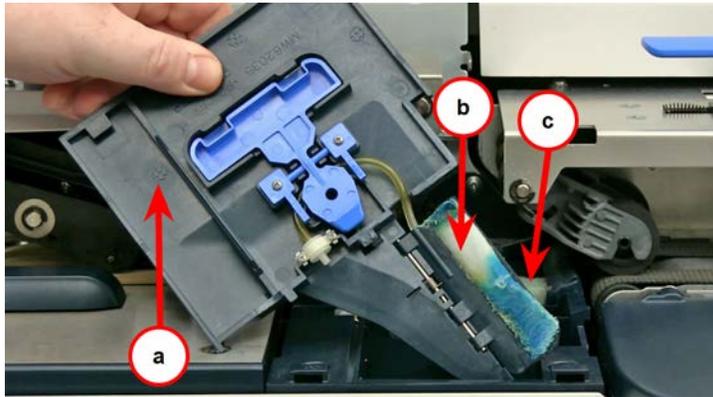
5. Push down on the moistener pad assembly button located on the feed deck.



6. Grasp the (a) moistener pad assembly and pull it out straight toward you.



- Turn the (a) moistener pad assembly over and examine the (b) moisture pad. Note the location of the (c) wick. If the pad contains dirt and gunk and looks like the image shown here, you need to replace the assembly.



- Using two fingers, grasp and remove the wick.



9. Locate the Moistener Replacement Kit, 2F3-E.



10. Insert the new wick. Gently push it all the way down into the wick holder until it is seated properly.



11. Push the new moistener pad assembly back on its track until it snaps into position.




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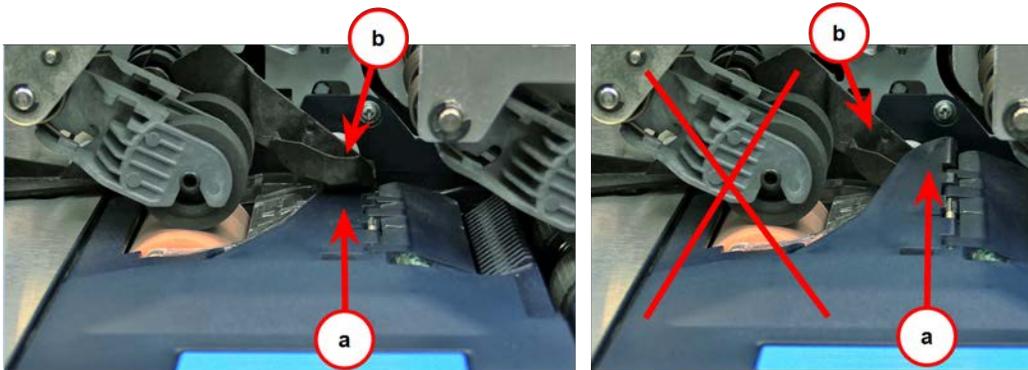
## IMPORTANT !

Make sure that the moistener pad assembly is perfectly level with the feed deck and that the stripper portion of the assembly is under the mail hold down finger.

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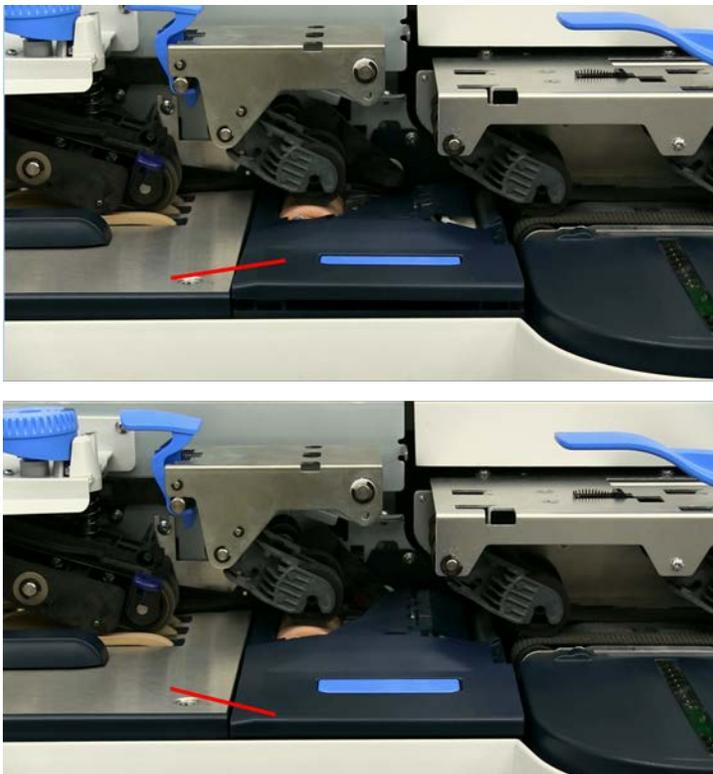


**Correct alignment with feed deck**



(a) Stripper on moistener pad assembly must be under the (b) mail hold down assembly

The following are examples of improper alignment:



Incorrect alignment with feed deck

12. Close the feed and print covers.

13. Run some envelopes and verify they are sealing correctly.

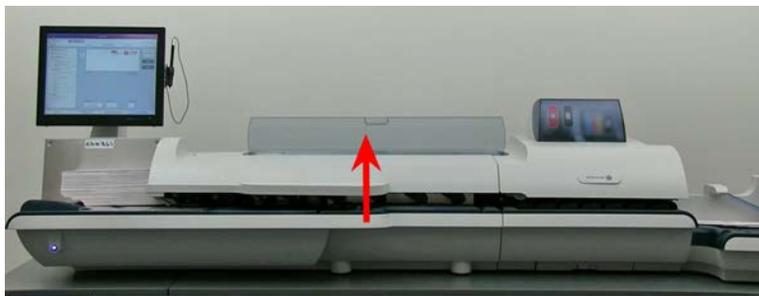
## Sealer Maintenance on your SendPro® P3000

If your envelope(s) are not sealing or not sealing properly, perform the recommended maintenance operations here. In order to complete these operations you will need the Moistener Replacement Kit, 2F3-F .

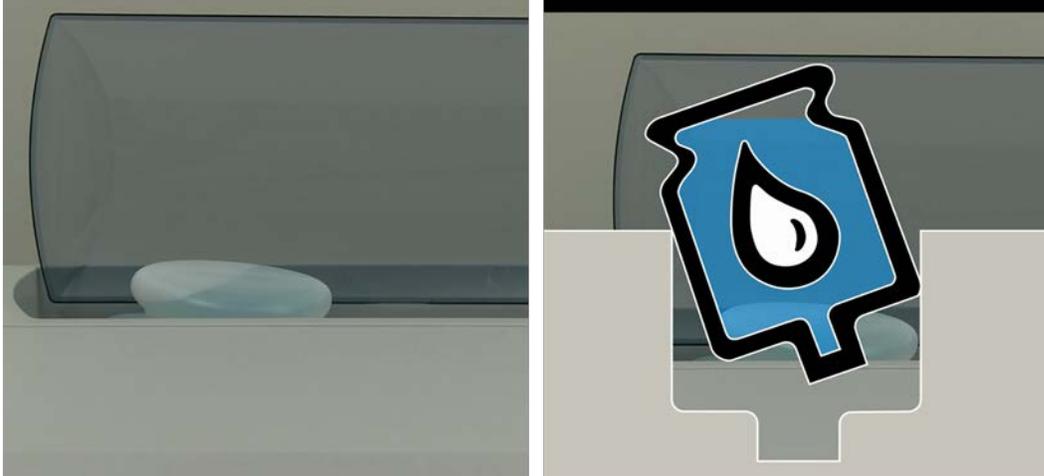


### Improperly sealed envelope

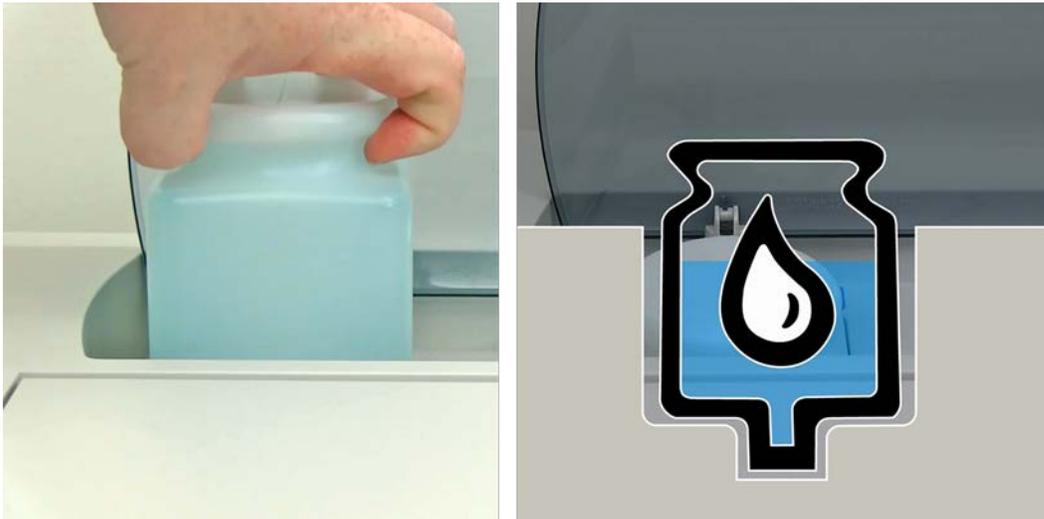
1. Open the supplies cover located on top of the feed cover.



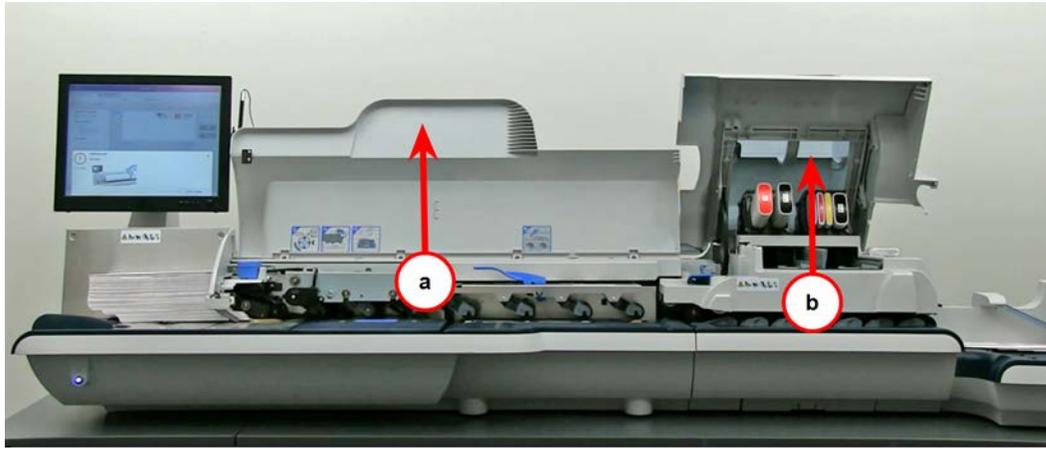
2. The envelope sealant bottle is located to the far left of the tape roll. Check to see if the sealant bottle is seated correctly. The following picture is an example of an improperly seated bottle.



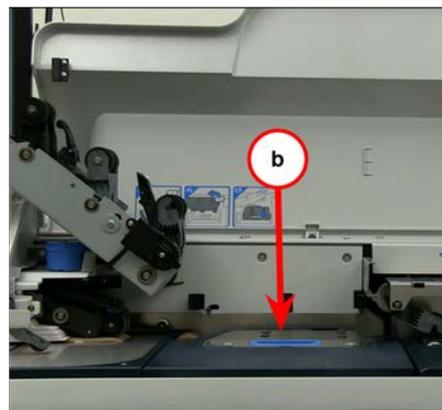
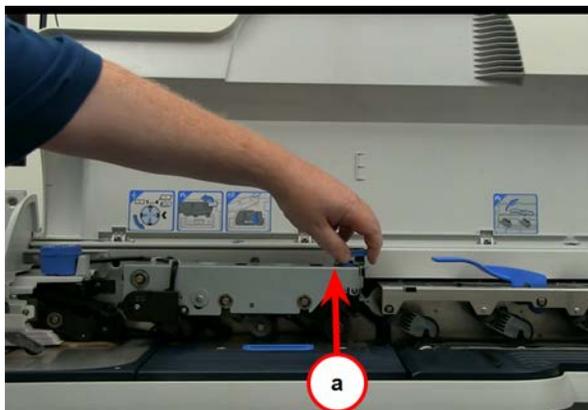
3. To re-seat the sealant bottle, lift it straight up and lower it again so that it is seated properly as shown in the following image.



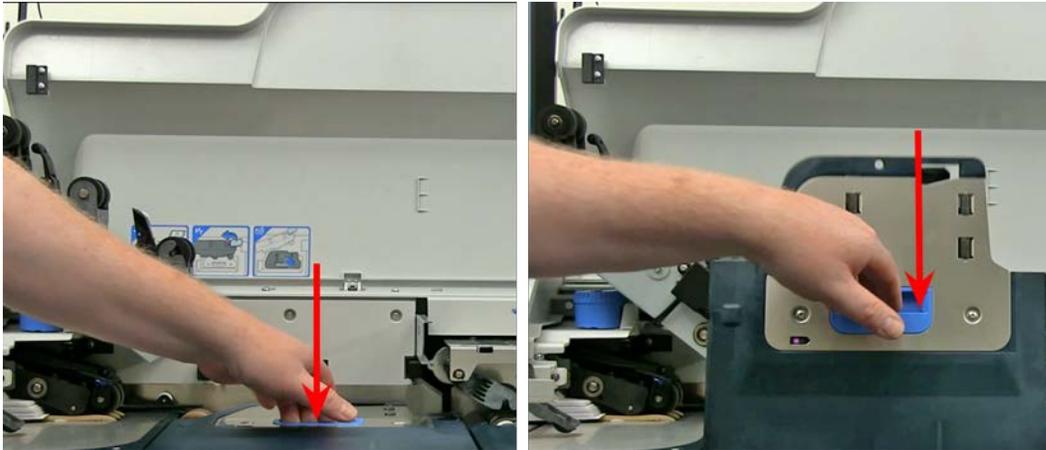
4. Close the supplies cover, then open the (a) feed and (b) print covers.



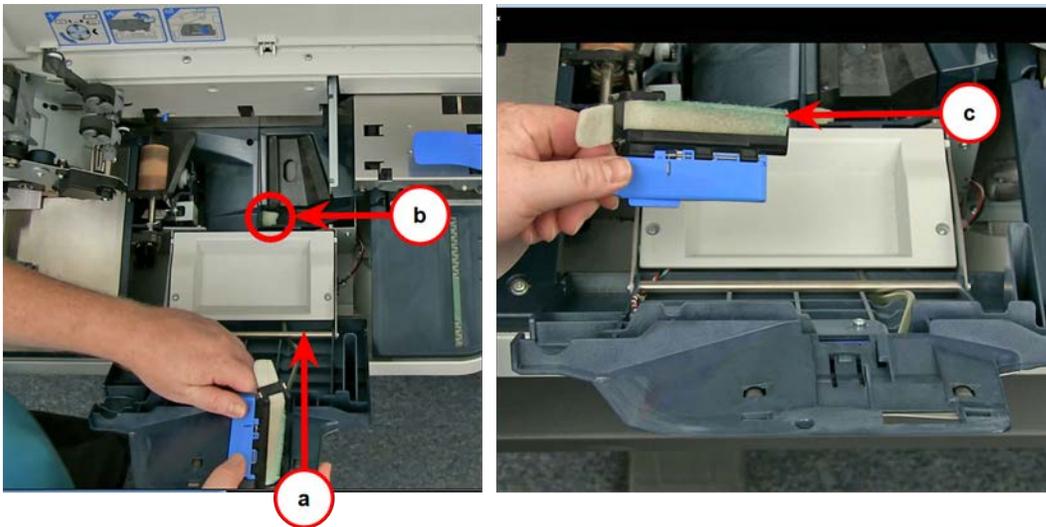
5. Pull up and to the left on the (a) top release lever to expose the (b) moistener deck.



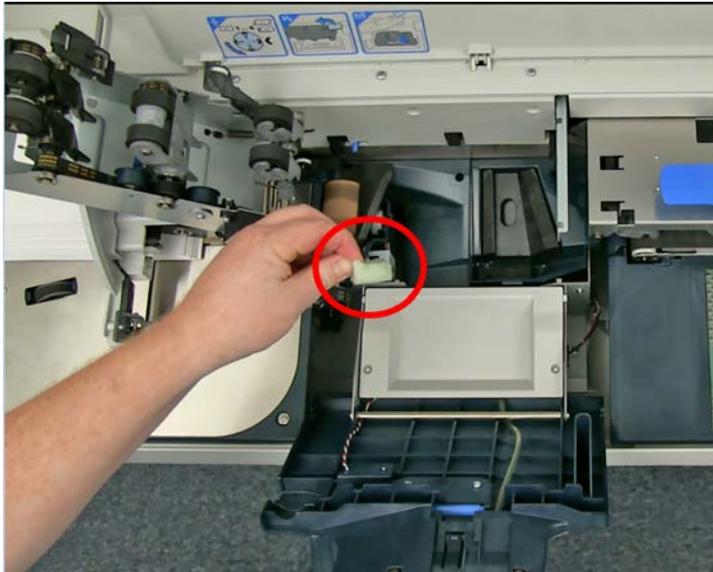
- Use the blue notch in the top of the moistener deck to pull the assembly up and toward you.



- Grasp the (a) moistener pad and pull it out of the assembly. Note the location of the (b) wick. If the (c) pad contains dirt and gunk and looks like the image shown here, you need to replace the moistener pad assembly.



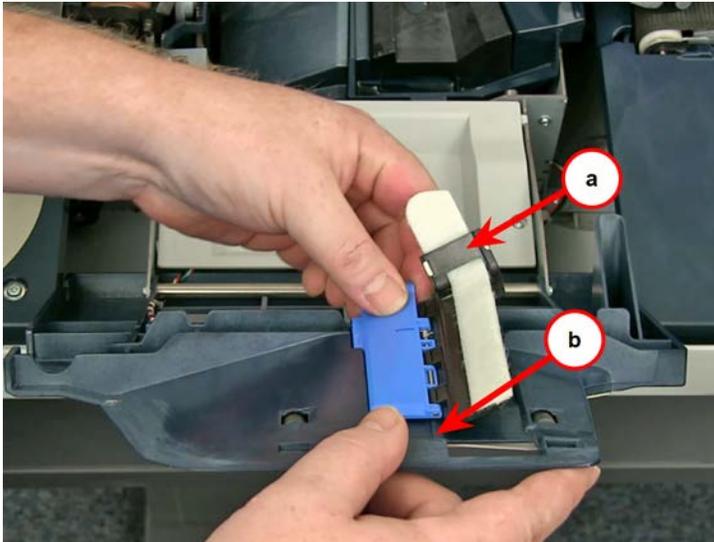
- Using two fingers, grasp and remove the wick.



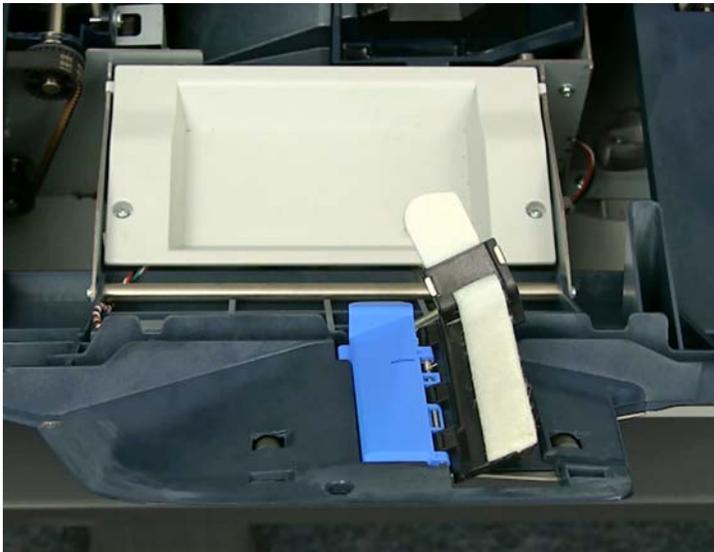
- Locate the Moistener Replacement Kit, 2F3-F.



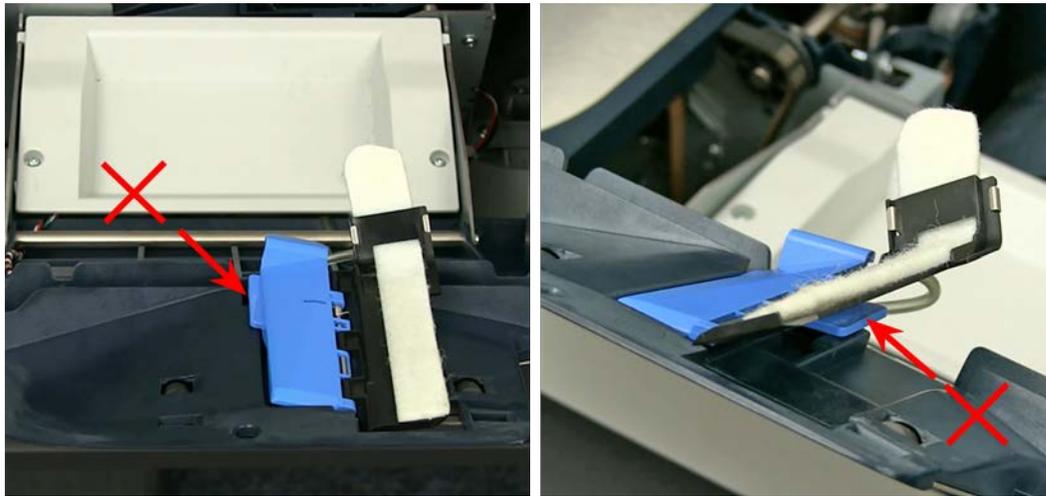
- Slide the new (a) moistener pad assembly back on its (b) track until it snaps into place.



Make sure the moistener pad assembly is inserted correctly within the moistener deck. The following images show the proper and incorrect alignments.

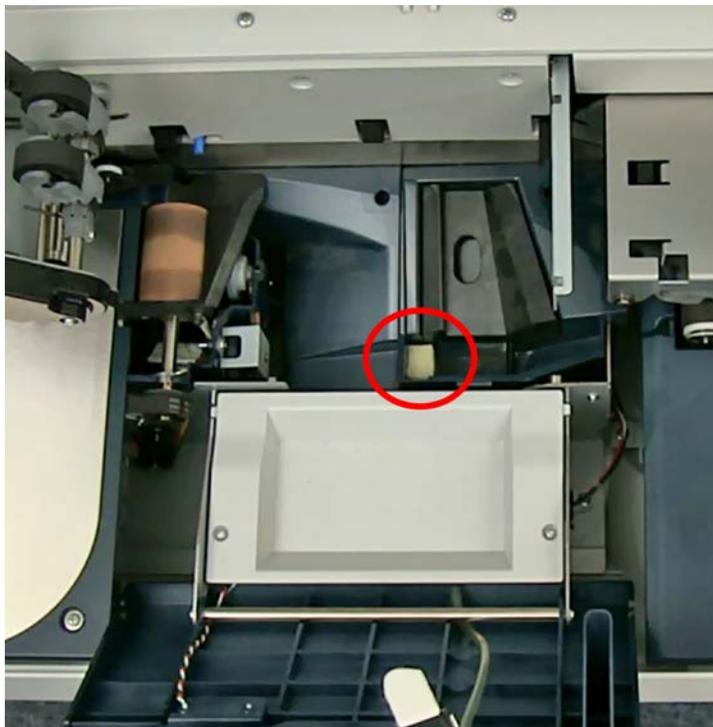


**Correct alignment with the moistener deck**

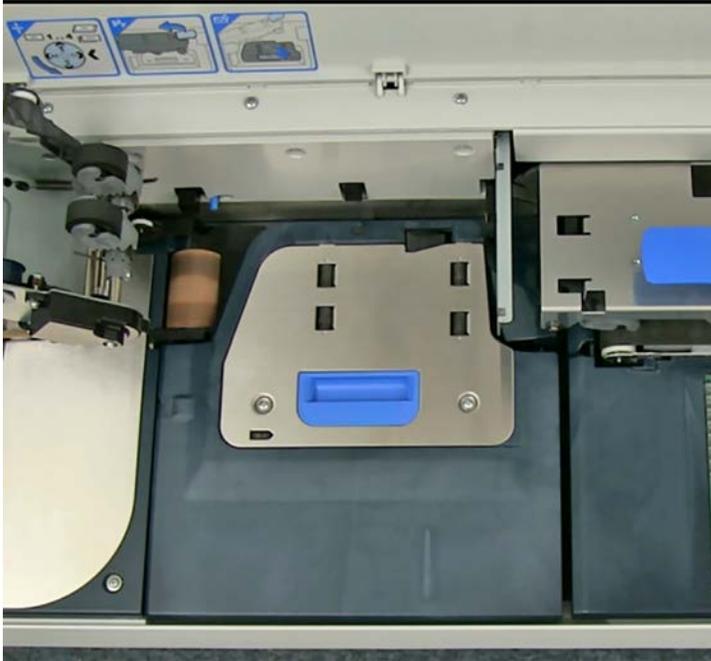


**Incorrect alignment with moistener deck.**

11. Insert the new wick. Gently push it all the way down into the wick holder until it is seated properly.



12. Push the moistener deck assembly back into place.

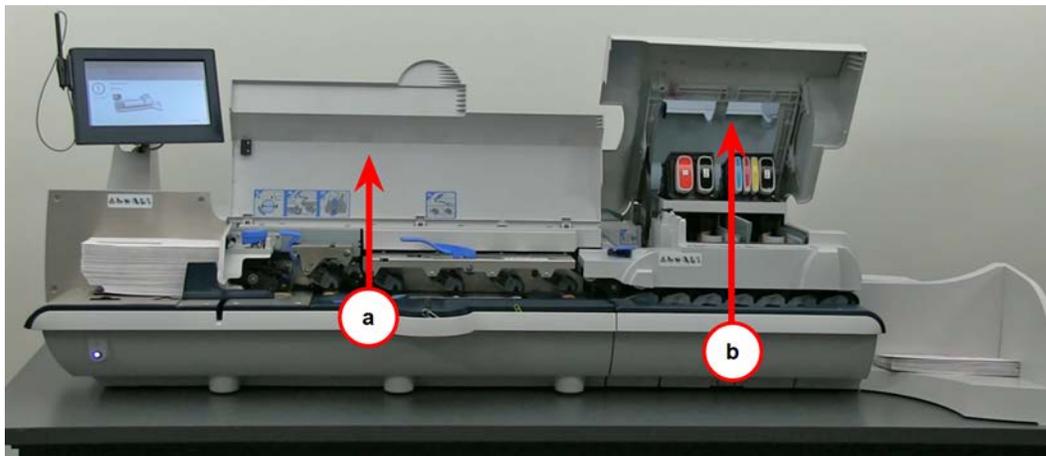


13. Close the top release lever. Make sure it snaps into place.
14. Close the feed and print covers.
15. Run some envelopes and verify they are sealing correctly.

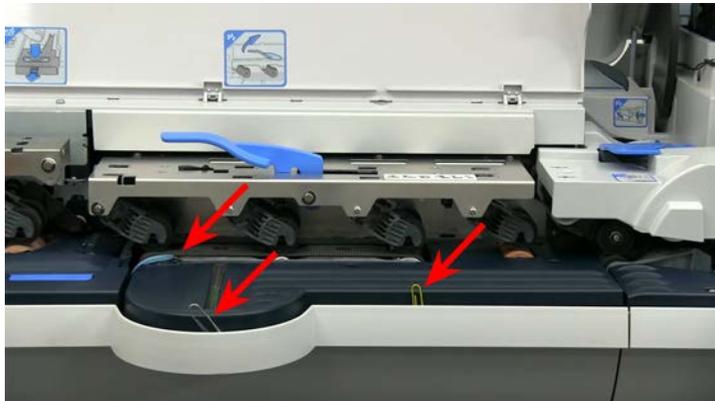
## How to fix W-O-W related errors on your SendPro® P1500 / SendPro® P2000 and SendPro® P3000

This procedure describes how to prevent and fix most WEIGH-ON-THE-WAY® (W-O-W®) issues on your SendPro® P1500, SendPro® P2000 and SendPro® P3000.

1. Lift the (a) feeder W-O-W transport cover and the (b) printer cover.



2. Remove any debris (like paper clips or rubber bands) from the W-O-W deck.



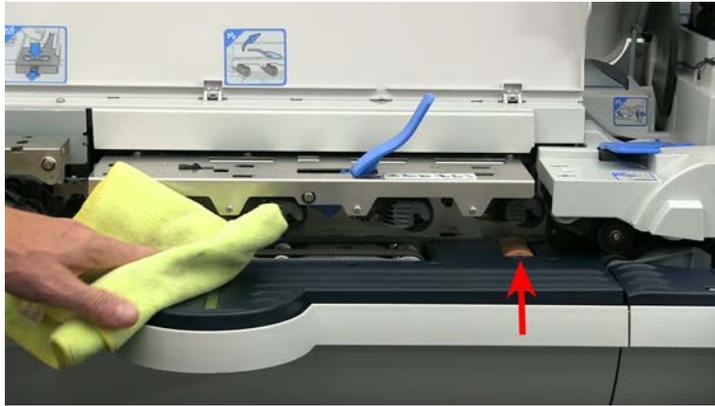
3. Lift up on the W-O-W transport release lever.



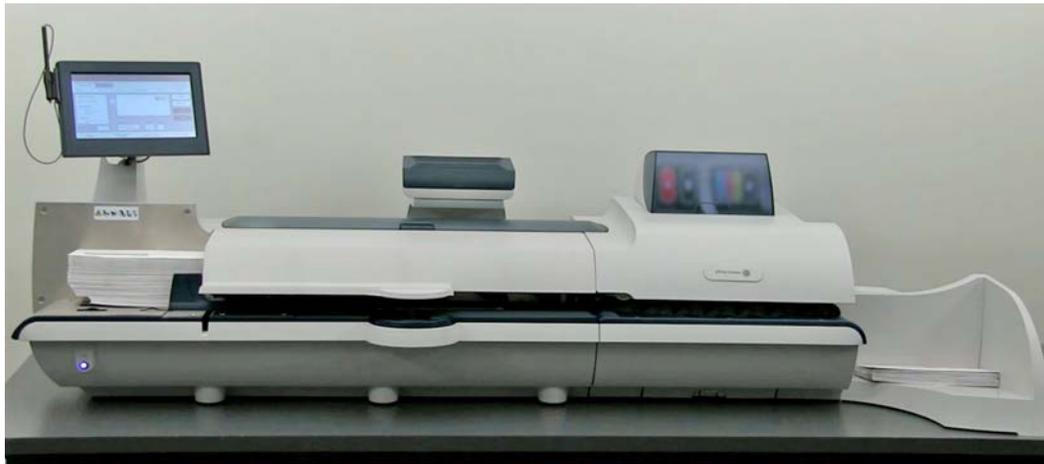
4. Fill a water-spray bottle and spray water on a lint free cloth.



5. Wipe any dirt or gunk off the W-O-W deck, including the printer entrance roller



6. Close the W-O-W transport release lever.
7. Close the feeder W-O-W transport cover and the printer cover.

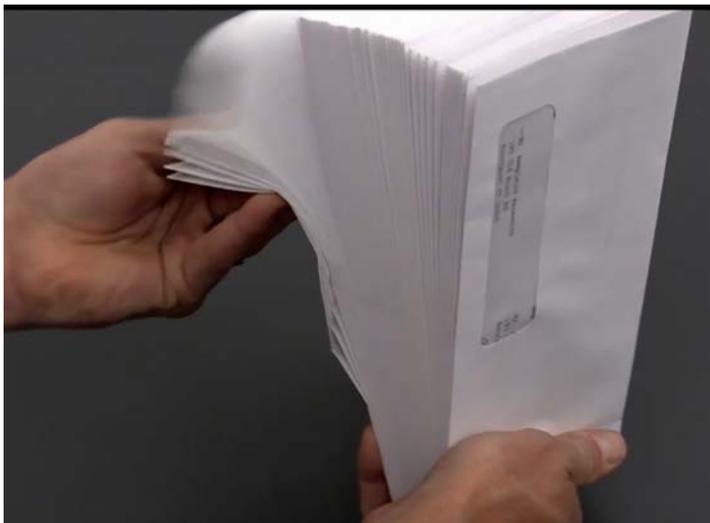


8. Prepare the envelopes for the feed deck.

- a. Align the stack of envelopes by tapping on a flat surface. DO not use the W-O-W cover as the surface.



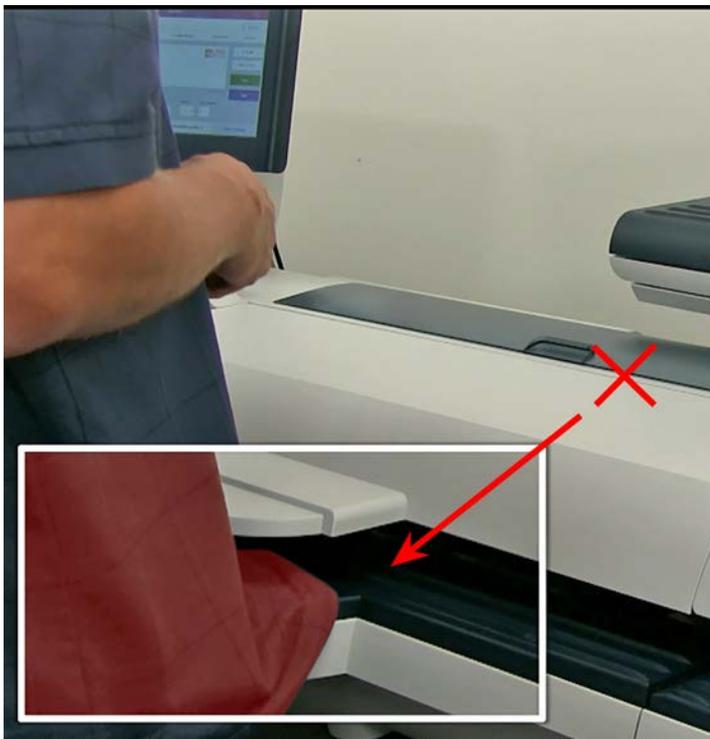
- b. Fan the envelopes.



- c. Shingle the stack of envelopes (slant as shown).



- d. When loading the envelopes onto the feed deck, make sure you do not lean up against the machine or have anything touching the W-O-W section.



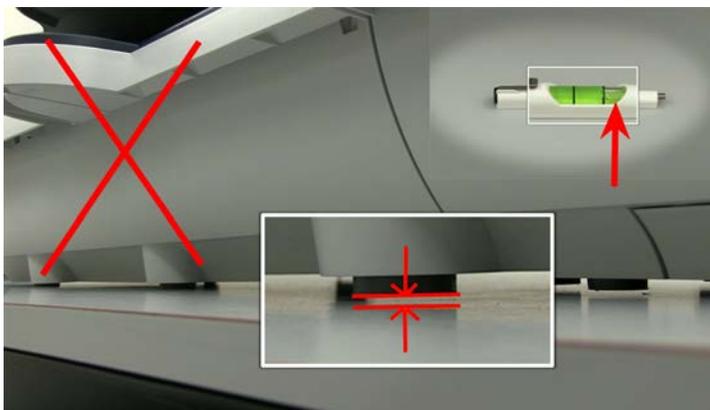
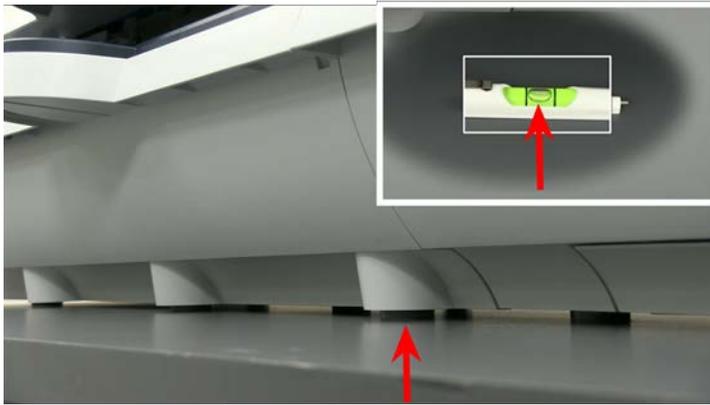
9. When running mail, be sure to follow these guidelines.

- Do not place any items on the machine.

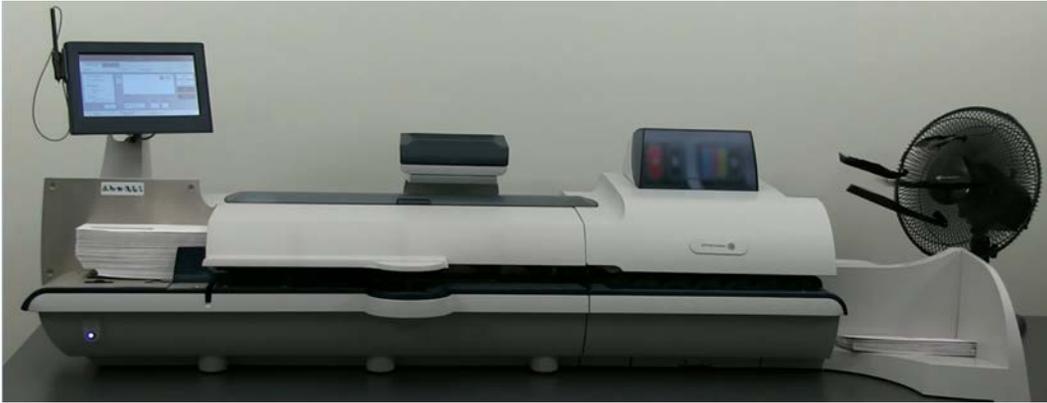


- Make sure the machine is on a stable surface. If the machine is on a table, it should not move either forward or backward or side to side when you press against the table or machine.

- All of the feet on the machine must be flat against the surface and the machine must be level.

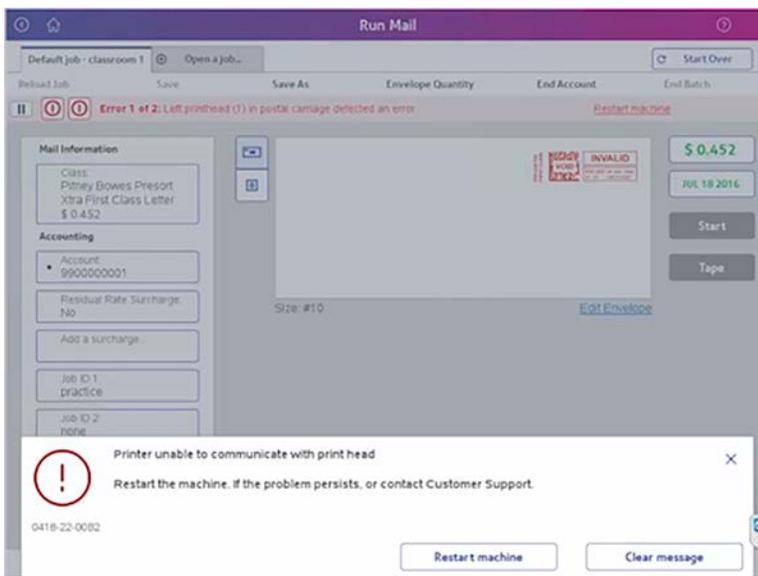


- Make sure machine is not located nears any fans or any sources of vibration.

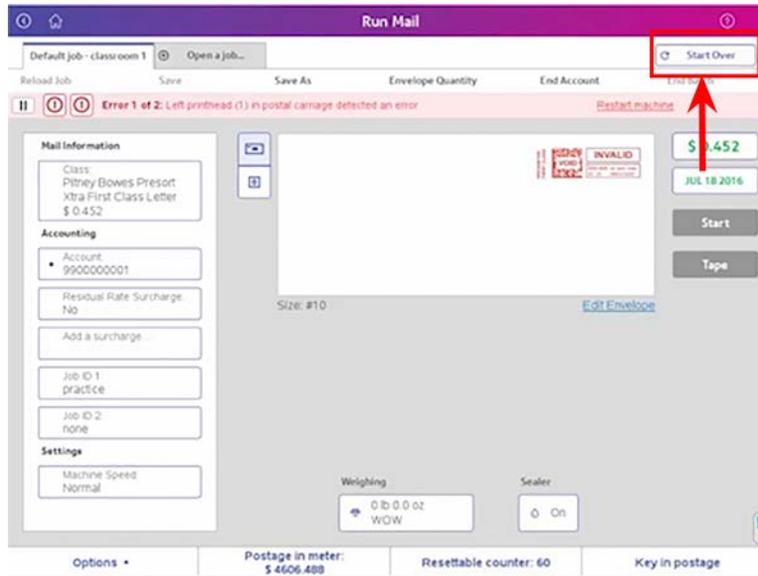


# Printer Error on your SendPro® P-Series

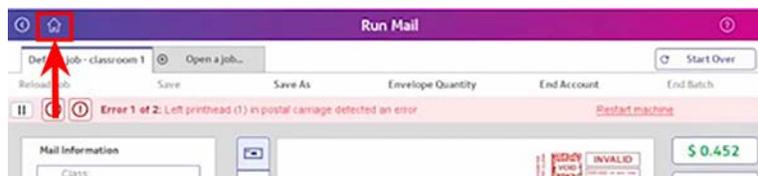
If you receive the following error message while attempting to print postage, follow the procedure here to correct the problem and resume printing.



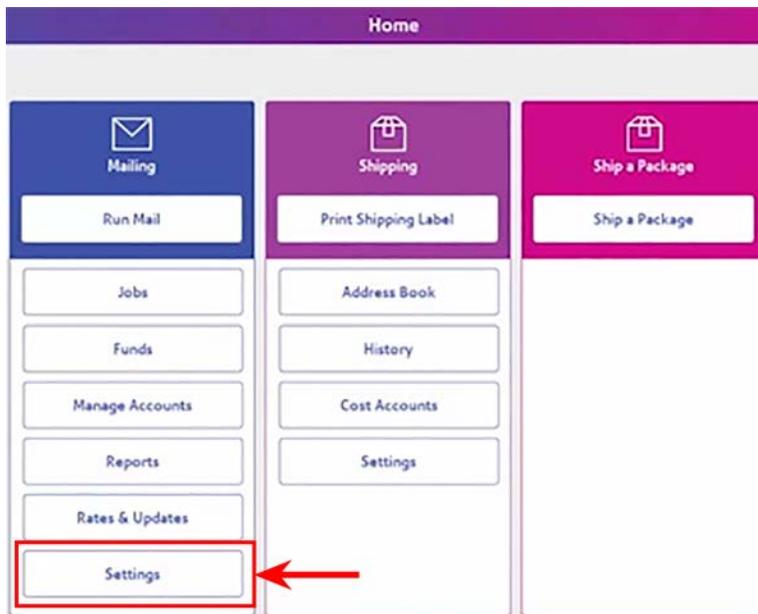
1. Select the **Clear message** button at the bottom of the Run Mail screen.
2. Select **Start Over** at the top right corner of the Run Mail screen.



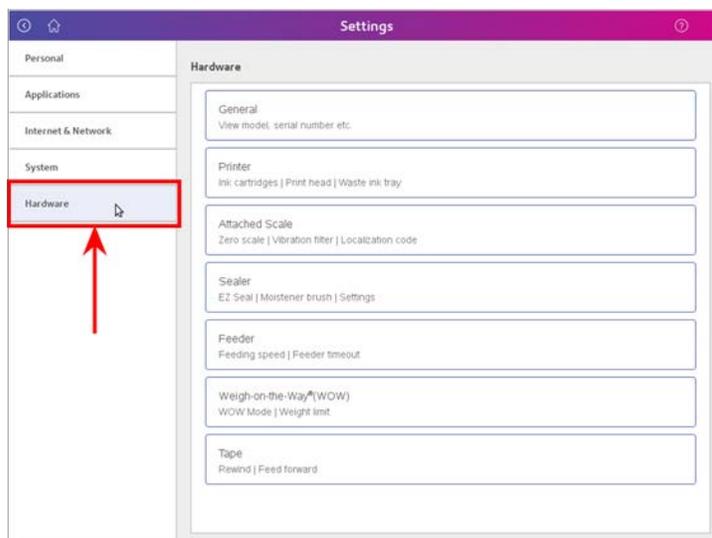
3. Select the **Home** icon to return to the Home screen.



4. Select the **Settings** button in the Mailing tile on the Home screen.

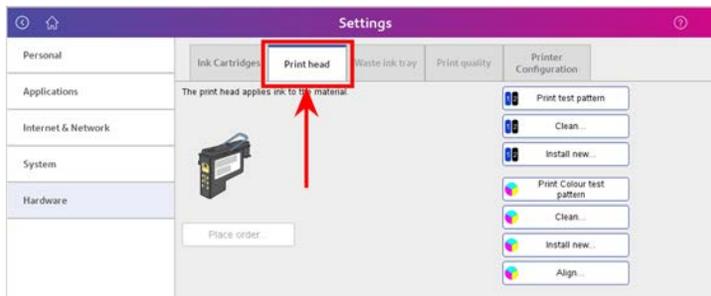


5. Select the **Hardware** button on the left pane of the Settings screen.

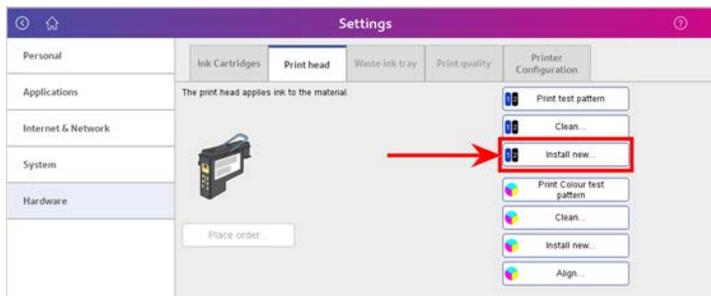


6. Select the **Printer** button on the right pane of the Settings screen.

7. Select the **Print head** tab in the Settings screen.



8. Select the **Install new** button.




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**NOTE:**

Please use the existing print head in this procedure.

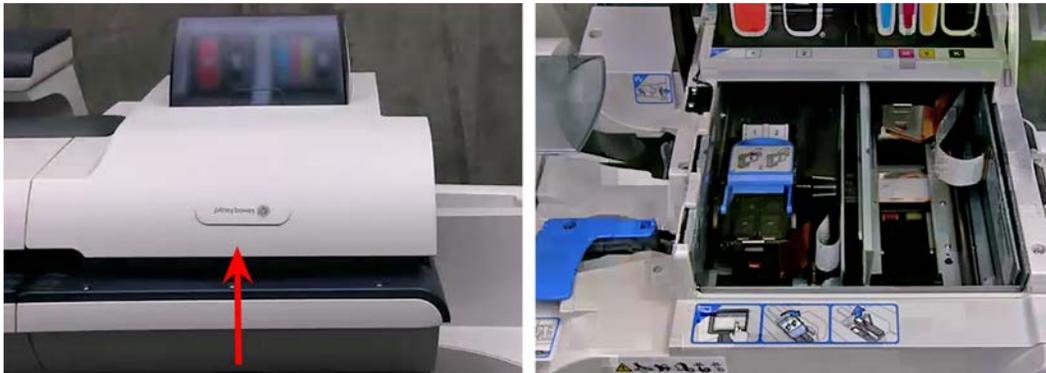
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You will receive the following message:

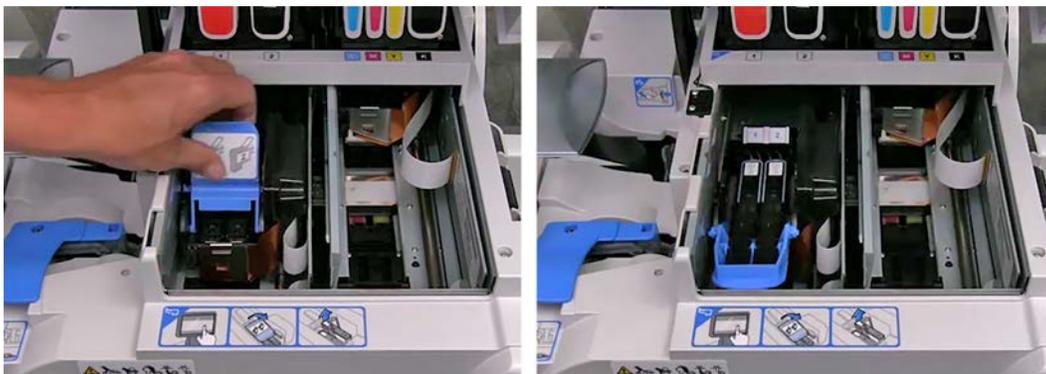
"Please wait while preparing to replace print head. This may take a few minutes. Do not open the printer cover until instructed."

9. As soon as the system is ready, a demonstration of how to replace the print head appears on the screen. Perform each of the steps shown in the demonstration. The steps are also shown here.

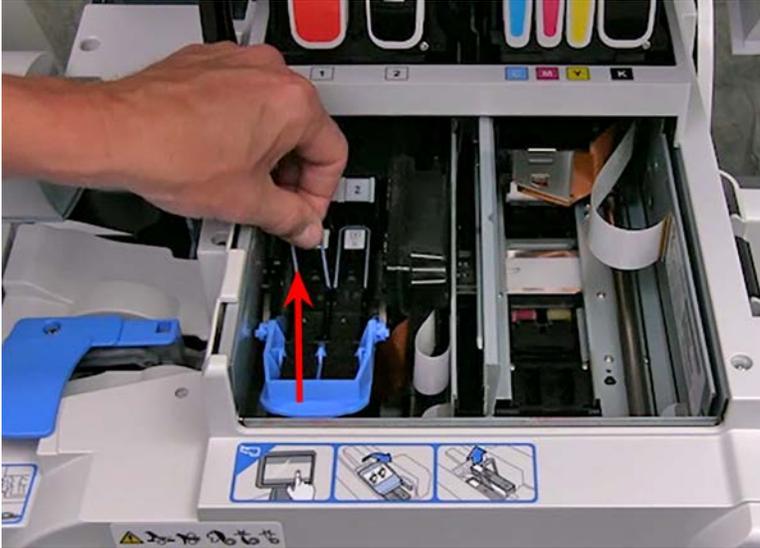
a. Open the printer cover.



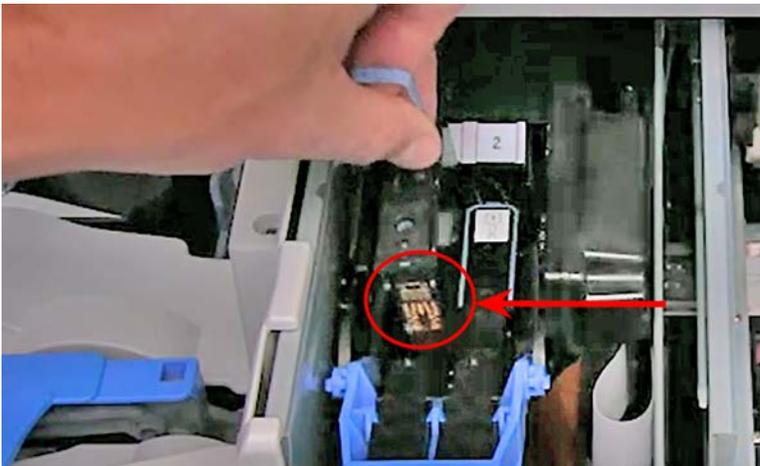
b. Pull the blue latch up and all the way forward until it stops.



- c. Lift the blue print handle up to a vertical position and then lift the print head straight up and out.



- d. Re-insert the print head. The print contact must be facing toward the front of the mailing system.



- e. Make sure the handle is down and then apply pressure only to the center of the print head.

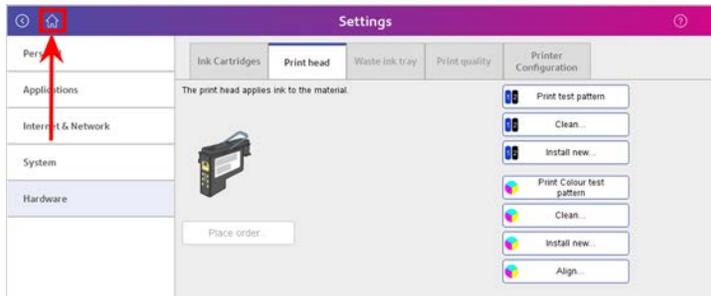


- f. Push the blue latch back until it stops.

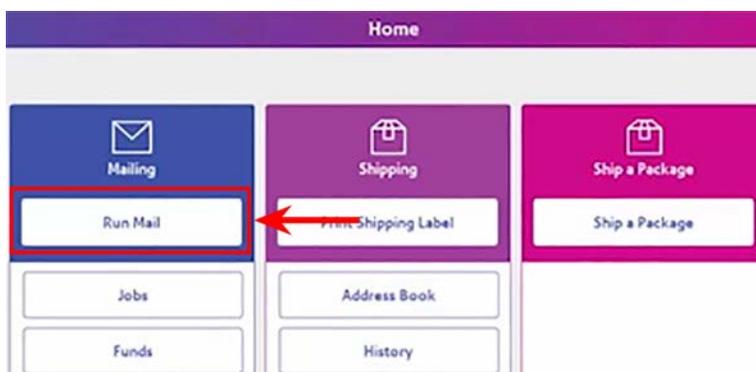


10. Close the printer cover. Once you close the cover, the system begins to prepare the print head. This may take a few minutes.
11. As soon as you are prompted to print a test pattern, select the **Cancel** button at the bottom of the Print Test Pattern screen.

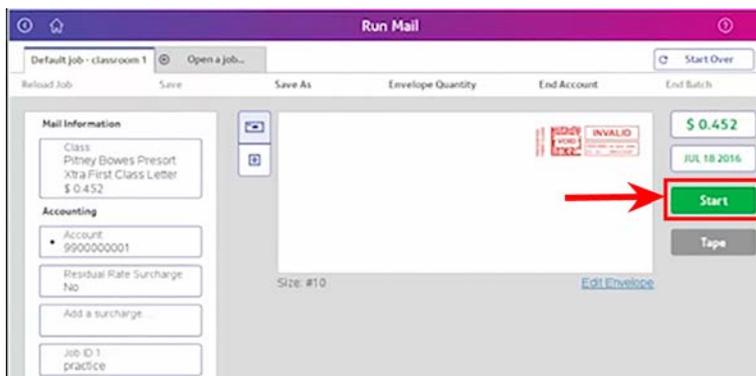
12. Select the **Home** button to return to the Home screen.



13. Select the **Run Mail** button in the Mailing tile on the Home screen.



14. Select the **Start** button on the Run Mail screen.



15. Verify that the envelopes print correctly.

## How to resolve tape feeding issues

This procedure describes some common tape feeding problems and how to correct them.

### Issue 1

Tape stoppage is occurring

#### Cause(s)

- Adhesive is left on the leading edge of the new tape roll.
- The leading edge of the tape is rolled or folded under the tape roller.

#### Resolution

If necessary, remove the tape roll.

Clear the tape stoppage. For more information, refer to How to clear a tape stoppage.

Re-install the tape roll.

### Issue 2

System is not wetting gummed tape.

#### Cause(s)

Tape moistener brush is dry due to air block in tubing.

#### Resolution

Remove the tape sealant bottle and re-install. Repeat as necessary until tape moistener brush becomes wet.

### Issue 3

Tape button is not available on the Run Mail screen.

#### Cause

You have selected a mode (such as WEIGH-ON-THE-WAY® (W-O-W®) mode) that requires mail be fed through the mailing system.

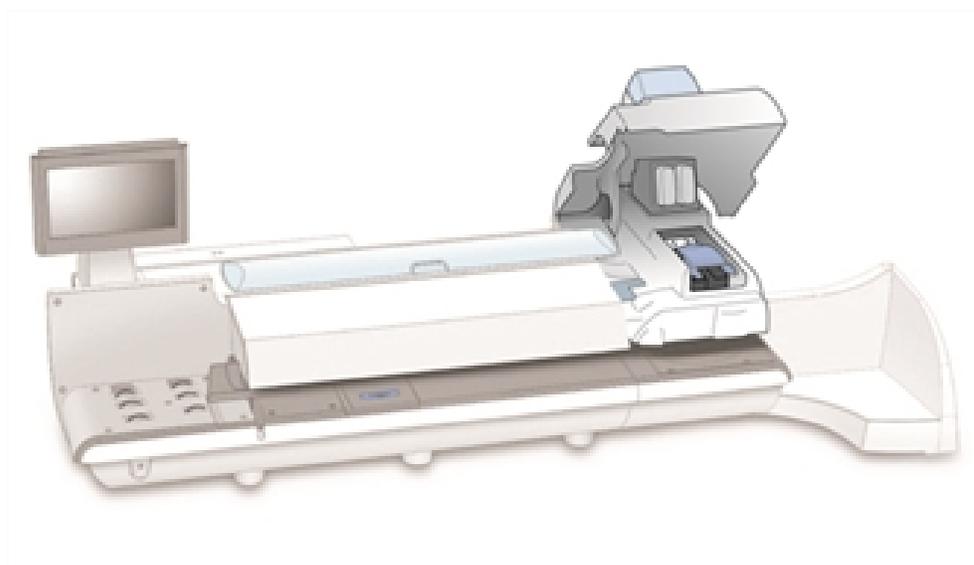
## Resolution

Change the weighing method.

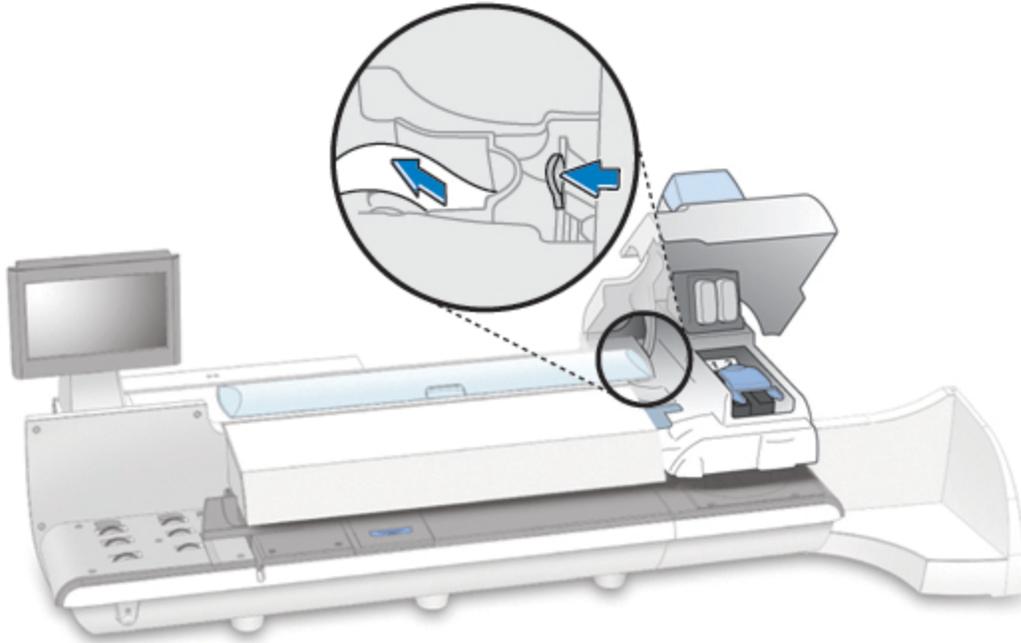
## How to clear a tape stoppage

Tape stoppages can occur while the tape is feeding from the feeder area to the printer area of your mailing system. When an tape stoppage occurs, an error message will display.

1. Lift the printer cover.



2. Press the blue tape lever to the left and remove the stopped tape.



3. Close the printer cover.
4. Select **Resume printing** to continue printing tapes.

## How to resolve printing issues

**Description:** No postage is printing.

Possible Cause	Solution
You are running a seal only job.	Select a different job.  Related topics: <a href="#">Previewing Jobs</a>

**Description:** Indicia is printing at an angle on the envelope.

Possible Cause	Solution
Envelope is skewing on the feed deck.	Ensure the thickness adjustment knob is adjusted to correspond to the envelope thickness.  Move the side guide close to, but not touching, the envelope.  Related topics: <a href="#">Parts of the Mailing System</a>

## How to resolve postage refill issues

This procedure describes some common problems with refilling postage and how to correct them.

### Issues

Postage refill cannot be completed.

### Cause(s)

- Account balance too low. You do not have enough money available for the selected refill amount.
- The requested refill amount is greater than the amount your meter can hold.
- The requested refill amount is greater than the maximum refill allowed.
- The requested refill amount is too low.
- Refill amount is not in accepted currency increments.
- The connection to IntelliLink® has been dropped.

### Resolution

- If you are refilling your meter manually, you need to change the refill amount you have selected.
- Try refilling your meter again (your connection to IntelliLink® may have dropped).

## How to resolve touchscreen response issues

This procedure describes some common touchscreen problems and how to correct them.

### Issue

Touchscreen is not responding to touch commands, or is not responding at all.

### Cause(s)

- The touchscreen needs to be calibrated.
- Cable for touch capability may not be attached properly to the touchscreen (wiggled out of place).
- If you have upgraded to the 15 inch display, but did not swap out the power cables, the touchscreen will shut down approximately 30 minutes after power up.

### Resolution

- Calibrate the touchscreen.
- Ensure the cable is properly attached to the touchscreen.
- Ensure appropriate power supply cable is being used.

## Contacting Pitney Bowes

Refer to the product identifier label on the bottom left corner of the feeder cover for Pitney Bowes contact information.

### **Remote System Assistance**

If you are unable to correct a problem with your Connect+ Series system, the Pitney Bowes Support Center can instruct you on providing remote access. Once you provide authorization, the center can connect to your system and troubleshoot the problem.