pitney bowes

Postage Meters

SendPro™ 300

Digital Postage Meter with SendPro™ (for Shipping)

Operator Guide

This Operator Guide is designed to assist in the daily operations of the SendPro™ 300 Digital Postage Meter. Use this guide as a reference, as it includes system operating procedures.

Version History

Document Part Number	Release Date	Comments
SV63216 Rev. A	August 2016	Initial beta release; added SendPro 300 shipping information and touchscreen interface to existing DM Series guide
SV63216 Rev. B	October 2016	Formal launch release; includes technical updates based on beta release of guide
SV63216 Rev. C	November 2016	Technical updates related to in-depth testing of the Mail topics.
SV63216 Rev. D	August 2023	Updated contact information.
SV63216 Rev.E	September 2023	Updated supplies information.

Contacting Pitney Bowes

Your System Information

Be sure to have the following information available before contacting Pitney Bowes Technical Support:

- **Product Name**: SendPro™ 300 Digital Postage Meter
- **PCN**: check the label on the front of the meter
- **Serial Number**: check the label on the back of the meter
- **Problem Description**:
  - What is happening and when?
  - Are there any error messages displaying?
- **Attempts to Fix**:
  - What steps have you already tried to fix the problem?
  - If you tried, what happened?

Technical Support

- **Web support**: *www.pitneybowes.com*

  a. Select **SUPPORT** > **Meters & Postage** > SendPro™ 300
  b. Select a topic link from the appropriate section

Account Information

- **Web support**: for account information go to: *www.pitneybowes.com* and sign in

Ink and Supplies

- **Web support**: to order or check supplies go to: *www.pitneybowes.com* and select **Shop**

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1 - Safety

In this section

Important Safety and Compliance Information

Important Safety Notes

Follow the normal safety precautions for all office equipment.

- Please read all instructions before you attempt to operate the system. Save these instructions for future use.
- 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 personal injury and/or property damage. Never use aerosol dusters labeled flammable and always read instructions and safety precautions on the duster label.

Power

The primary power for the unit is provided by a power cord.

- Use the power cord supplied with the machine and plug it into a properly grounded wall outlet that's located near the machine and easily accessible. Failure to properly ground the machine can result in severe personal injury and/or fire.
- The power cord wall plug is the primary means of disconnecting the machine from the AC supply. The unit is on whenever it is plugged into a live receptacle (and the switch in the back of the unit is in the ON position), even though the operator display may be blank.
- Place the mailing machine base close to an easily accessible wall outlet. DO NOT use a wall outlet controlled by a wall switch or one that is shared with other equipment.
- Do not use an adapter plug on the line cord or wall outlet.
- Do not remove the ground pin from the line cord.
- Make sure the area in front of the wall outlet into which the machine is plugged is free from obstruction.
- DO NOT route the power cord over sharp edges or trap it between pieces of furniture. Make sure there is no strain on the power cord

DC Power for Network Connectivity Functions - External AC/DC Power Adapter

- Use only the AC/DC power adapter provided with this equipment. Third-party adapters may damage the equipment.
- Plug the adapter into a wall outlet
- DO NOT use a wall outlet controlled by a wall switch or one that is shared with other equipment
- DO NOT wrap the adapter cable over sharp edges or trapped between furniture

- Be certain the area in front of the wall outlet where the AC adapter is connected is free from obstruction
- To reduce the risk of fire or electrical shock, DO NOT attempt to remove covers or disassemble the control panel or its base. The cabinet encloses hazardous parts. If you should drop or otherwise damage the unit, call Pitney Bowes.
- Use only Pitney Bowes approved ink, tape sheets, and cleaners. To obtain Material Safety Data Sheets (MSDS) for OSHA requirements, please go to *www.pb.com/msds*. When prompted, enter the product name, manufacturer, the Pitney Bowes MSDS Number or reorder by item number..
- Keep fingers, long hair, jewelry and loose clothing away from moving parts at all times.
- Avoid touching moving parts or materials while the machine is in use. Before clearing a stall (jam), be sure machine mechanisms come to a complete stop.
- To prevent overheating, do not cover vent openings
- When removing stalled material, avoid using too much force to protect against minor personal injury and damage to the equipment.
- Use the equipment only for its intended purpose
- Always follow the specific occupational safety and health standards prescribed for your workplace.

> ⚠️ **Caution: Ink Spill**
>
> In case of an ink spill, leaking ink or excessive ink accumulation, immediately disconnect power cord from wall plug and contact Pitney Bowes. Customer Service Representatives available Mon. -Fri. 8:00 AM - 8:00 PM ET.

System Specifications

- **Model**: SendPro™ 300 (Product Code PRZ0)
- **Power Requirements**: 100-240 VAC, 50/60Hz. 1.0A
- **Operating Temperature**: 40 °F (4°C) to 108°F (42°C)
- **Sound Level**: Machine noise is less than 70dba in accordance with EN ISO 7779 and ANSI 12.10

Declaration of Conformity According to FCC Rules Part 2 , Paragraph 2.1077

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) this device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation. Responsible party: Pitney Bowes, 3001 Summer Street, Stamford, CT 06926.

This equipment has been tested and found to comply with the limits for a Class B digital device, pursuant to part 15 of the FCC rules. These limits are designed to provide reasonable protection against interference in a residential installation. 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. However, there is no guarantee that interference will not occur in a particular installation. If this equipment does cause interference to radio or television reception, which can be determined by turning the equipment off and on, the user is encouraged to try to correct the interference by one or more of the following measures:

- Reorient or relocate the receiving antenna
- Increase the separation between the equipment and receiver
- Connect equipment into an outlet on a circuit different from that to which the receiver is connected
- Consult the dealer or an experienced radio/TV technician for help

> ⚠️ Caution: Modifying Equipment
>
> 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. Shielded I/O and USB cables must be used with this equipment to ensure compliance with the limits. Use of unshielded cables is prohibited.

Radio Frequency

This equipment contains the following FCC approved radio frequency transmitters:

- FCC ID: PY313200234
- FCC ID: VPYLB1GC
- FCC ID: YH57DTB44

This device and its antennas must not be co-located or operating in conjunction with any other antenna or transmitter.

Batteriers (for California Customers Only)

Batteries in this product contain 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/

Servicing

This equipment is not intended to be serviceable. Please refer to the warranty information if problems occur. Failed units will be returned to the Pitney Bowes U.S. Service Center.

For reference purposes, the Pitney Bowes U.S. Service Center contact address is: Pitney Bowes Inc., 3001 Summer Street, Stamford, CT, 06926.

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2 - Getting Started

In this section

About SendPro™ 300

The SendPro 300 is a digital mailing and shipping system that allows you to print postage on envelopes or tape strips and to create shipping labels for USPS®, FedEx® and UPS®. It has a unique and easy-to-use touchscreen interface for accessing all of the mailing and shipping features.

The SendPro 300 includes an internal Wi-Fi router that emits a continuous Wi-Fi signal that may be visible in a client's network. The sole purpose of the router is to manage internal connections of the SendPro 300. This Wi-Fi signal should not be used for any other devices. This device is necessary for operation of the system.

Things you can do with the SendPro 300 Mailing Application:

- Print postage on envelopes and tape strips (labels)
- Add advertisements, inscriptions and messages to your envelopes
- Run address verification
- Calculate postage based on item weight and class of mail
- Automatic USPS postal rate and software updates
- Create Custom Presets to save commonly used settings
- Track your postage costs by categories with the Accounting feature
- Print reports for funds usage, postage refills, and other data

Things you can do with the SendPro 300 (for Shipping) Application:

- Create and print shipping labels for USPS, FedEx and UPS
- Create and print return labels
- Weigh your shipping package
- Schedule pickups
- Send updates in real-time
- Track shipments online
- Get a shipping history
- View USPS account information
- Set up shipper accounts
- Cancel shipments and get refunds

United States Postal Service (USPS®) Requirements

Since your postage meter (Postal Security Device) is licensed by the 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.
- The USPS requires a postal inspection of your machine every 120 days. 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. For more information refer to: *Perform Meter Inspections*.
- The postage tape you use must meet USPS specifications.

Parts of the Machine
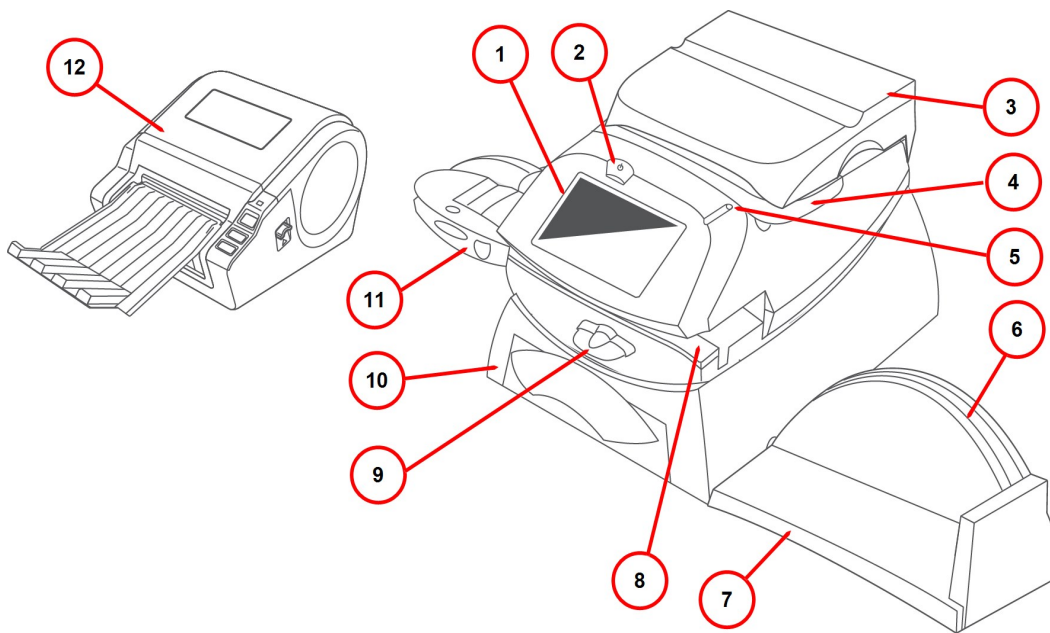
Item	Part	Description
1	Touchscreen	Allows you to enter and set up information on your mailing system
2	Touchscreen Power Switch	Puts the touchscreen into sleep mode
3	Weighing Platform	Allows you to weigh a mail piece for postage calculation
4	Top Cover	Open this to replace the ink cartridge
5	LED	Lights up green when machine is on; amber when machine is in sleep mode
6	Utility Slot	Allows you to store the Quick Reference Guide, tape sheets, etc. for easy access
7	Stacker Tray	Allows the neat stacking of finished mail pieces
8	Feed Deck	Supports envelope, post card or tape strip as it passes under print mechanism
9	Transport Release Lever	*Home* - transport rollers engaged for processing mail; *Released* - transport rollers disengaged so you can clear a stalled mail piece
10	Storage Drawer	Holds Return Receipt and Confirmation Services labels
11	Moistener (optional)	Applies sealing fluid to the envelope flap
12	Label Printer	Prints USPS, UPS and FedEx shipping labels

Navigate the Home Screen

The Home screen is the first screen displayed when you log onto the system. It includes two buttons - one for Metering Mail (called Mail), and one for Printing Shipping Labels (called Shipping Label).

- Mail button (metering mail)
- Shipping Label button (printing shipping labels)

You can select the various functions within Mail or Shipping by tapping the appropriate button. For example, to start metering mail, select the **Mail** button and to Print Shipping labels select the **Shipping Label** button.
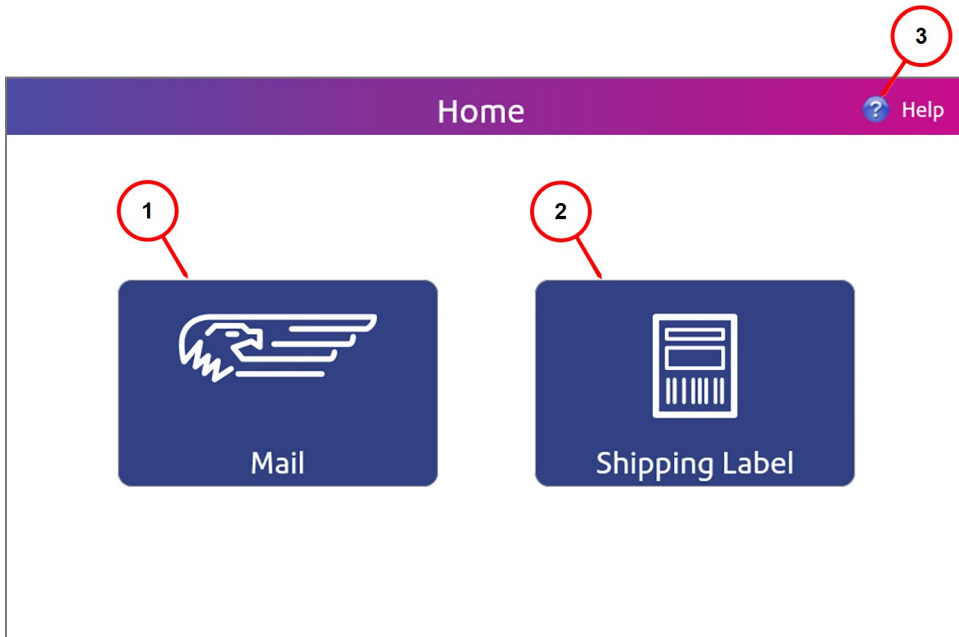
Home Screen - Mail and Shipping Label Buttons

Item	Part	Description
1	Mail button	All metered mail (meter stamp) functions happen here
2	Shipping Label button	All USPS, FedEx and UPS shipping label functions happen here
3	Help icon	Access to detailed information about using your SendPro 300

Mail Screen
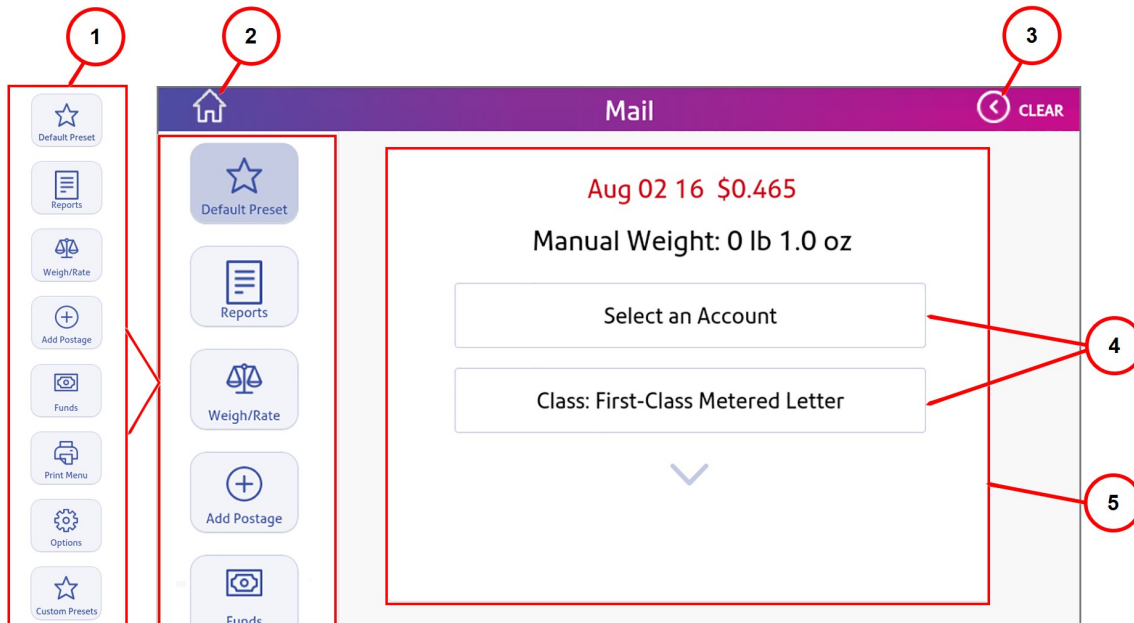
Item	Element	Description
1	Mail Screen Function buttons	
2	Home button	Brings you back to the Home screen
3	Clear arrow	Use to return to previous screens
4	Option Menus	Use this area to navigate through mailing and machine options
5	Selection fields	All metering mail options are made herein conjunction with the function buttons

Shipping Label (or Carrier) Screen

Item	Element	Description
1	Carrier buttons	Start point to creating a shipping label from the specified carrier
2	Shipping screen menus	Access general shipping settings and options here: • Home - brings you back to the Home screen • Shipping - brings you to the Shipping Label (or Carrier) screen • Address Book - all Sender and Recipient information is managed here • History - where all shipment information is stored • Printing - global printing settings can be defined here • Cost Accounts - helps keep track of where shipping postage costs are being used (*not enabled for this model*)

Connections on the Back of the Machine

This section gives an overview of the connections on the back of the system. For step by step instructions refer to the SendPro™ 300 Installation Instructions (AW32067) available on our website, *www.pitneybowes.com*.

Base and Scale Configuration
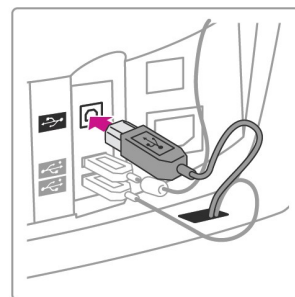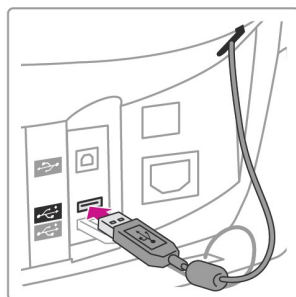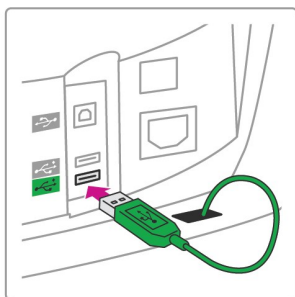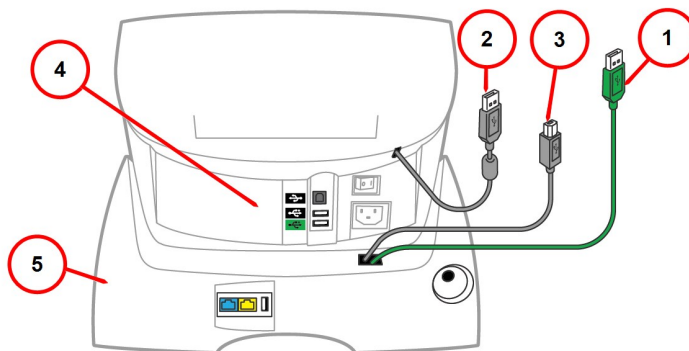
Item	Description
1	Green USB cable to bottom port on meter
2	Gray USB cable to middle port on meter
3	Gray USB cable to top port on meter
4	Meter
5	Base

Power and Internet Configuration
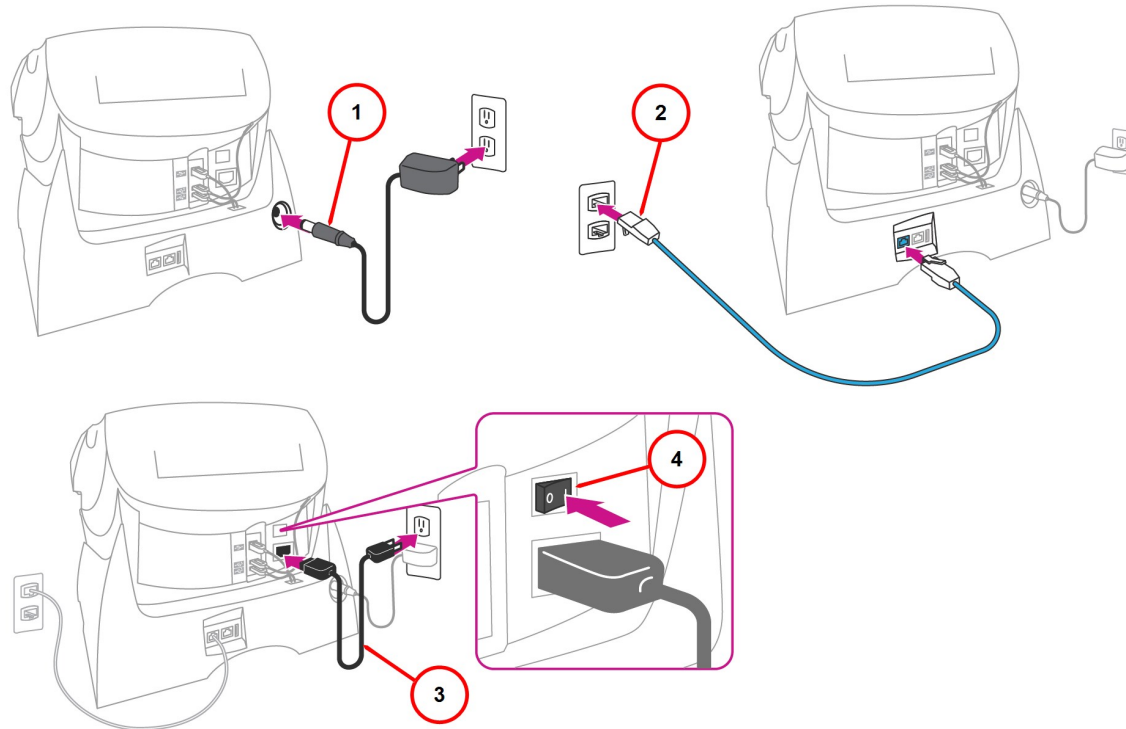
Item	Description
1	Base power adapter to power source
2	Internet cable to blue jack on base
3	Meter power adapter to power source
4	On/Off switch

Label Printer Configuration
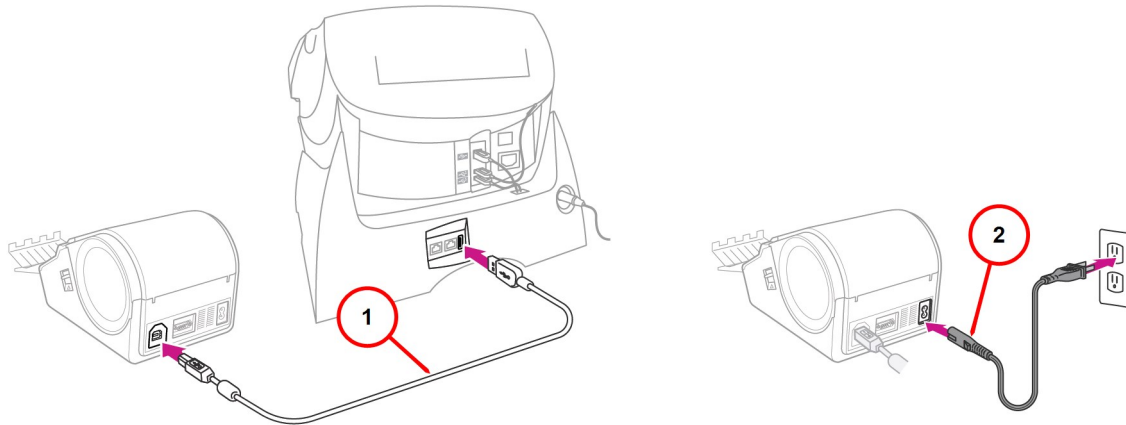
Item	Description
1	Label printer USB cable to base
2	Label printer power adapter to power source

Postal Security Device

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.

Connect to the Pitney Bowes Data Center

In order to download postage to your meter and perform postal rate updates, inspections and system updates, you must connect to the Pitney Bowes Data Center.

Your SendPro 300 connects to the Pitney Bowes Data Center using **SmartLink** technology which gives you the full benefits of SmartLink including:

- Automatic USPS rate updates and software updates
- Low ink and low fund notifications, and simplified ink ordering

- Remote diagnostics with support and error troubleshooting notifications
- Customized insights on meter and postage usage

Your machine connects to an active internet connection via a LAN cable. One end of the LAN cable needs to be connected to the blue (Internet/LAN) port on the back of the machine. The opposite end connects to an active internet wall jack or router. For more information on connecting your machine refer to SendPro™ 300 Installation Instructions (AW32067), available on our website, *www.pitneybowes.com* or the *Connections on the Back of the Machine* section in this guide.

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3 - What You Can Print on Mail Pieces

In this section

Printing Options

You can select to print the following components on your mail piece or bypass all printing:

- *A normal meter stamp (also referred to as the indicia)*
- *A meter stamp with $0.00 postage*
- *A meter stamp with an advanced date*
- *A meter stamp with no date*
- *Printing the date and time only (no meter stamp).*
- *Printing advertisement and text message only (no meter stamp)*
- *Printing advertisement, text message, date and time only (no meter stamp)*
- *Bypass all printing and seal the envelope only*

What's in the Meter Stamp

The location of the meter stamp items on a mail piece or tape sheet are shown here.
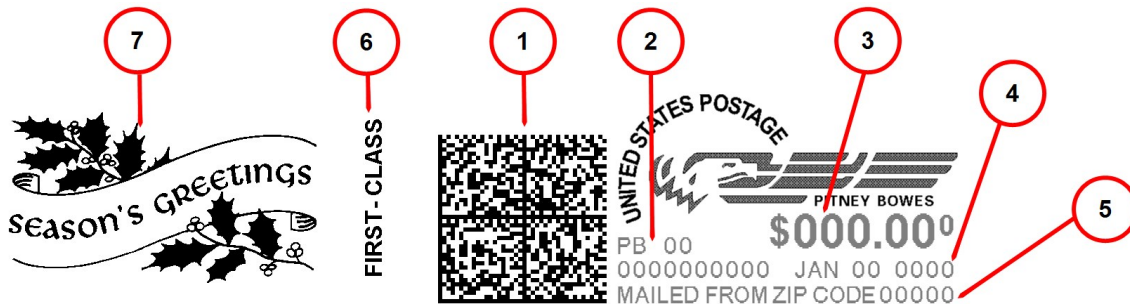
Item	Description
1	Datamatrix barcode - contains tracking information
2	Meter serial number
3	Postage amount
4	Date
5	ZIP code of the machine
6	Optional postal inscription/class
7	Optional advertisement

Print a Meter Stamp with $0.00 Postage

You can check the quality of the meter stamp imprint without using any of your postage funds by printing a meter stamp with $0.00 postage.

Note:

You will need to have at least one account established to proceed with this task. You can set up a "dummy" account for this purpose or a legitimate account since no postage will be charged against the account. Refer to *Create an Account*.

1. From the Home screen select **Mail**.
2. Select **Weigh/Rate**.
3. Select **Enter weight manually**.
4. Select **Enter Pounds**, enter "**0**", and press the **Return** key on the keyboard.
5. Select **Enter Ounces**, enter "**0**", and press the **Return** key on the keyboard.
6. Select **Continue**.

7. Select **First Class**.
8. Select **Metered Letter**.
9. If accounting is enabled, select an account. No postage will be applied against the account since you entered $0.00 postage.
   - If no account exists you will be prompted to create one. After you have created an account return to step one.
10. Apply postage to the mail piece:
    - **If using the moistener**: Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.
    - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape sheet.

Print a Meter Stamp with an Advanced Date

You may want to advance the date printed on the meter stamp if it is after normal business hours and you want to prepare outgoing mail for a future business day's mailing.

Note:

The machine automatically advances the printed date on the meter stamp (as well as its internally held date) when the system time reaches 12:00 AM.

Advanced Date Features

- You can advance the date up to 30 days from the current date.
- Changing the printed date does not change the machine's internally held date.
- You can always return the printed date to the current date.
- You cannot change the printed date to a date earlier than the machine's internally held date, in an effort to "backdate" the mail.
- Accounting data is posted on the actual date the mail piece is run (per the internal clock/calendar in the mailing system), *not by the date printed on the meter stamp*.

How to Advance the Date Manually

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Advance the Date**.
4. The machine displays the current date in MM DD YY format. You can either:
   - Advance the date by one day
     a. Select **Add one Day**. The new date now shows in the Mail screen.

        OR

   - Advance the date up to 30 days
     a. Tap the text field and enter the number of days from the keypad. Select the **Return** key on the keypad.
5. Select **Save and Continue**. The new date now shows in the Mail screen.

Reset the Date Back to the Current Date

1. To set the date on your mail back to the current date, select **Options** from the list on the left.
2. Select **Set to Today's Date**.

Print a Meter Stamp with No Date

Most mailings print the date as part of the meter stamp but for certain classes of mail, you may want to turn the date off. Call your local post office or visit *https://www.usps.com* for further information.

1. From the Home screen select **Mail**.
2. Select **Print Menu** from the list on the left.
3. Scroll to select **Omit Day/Date/Other**.
4. Select either **Omit the Day** and only the month and year will print, or **Omit the Date** which prints a meter stamp with no date.
5. You return to the Home screen and either the day or date will not print on the meter stamp.

To restore the day or date, perform steps #1 and 2 , and select **Restore the Day** or **Restore the Date**.

Print the Date and Time Only (no meter stamp)

You may want to use this feature to time-stamp incoming mail or sensitive documents.

1. From the Home screen select **Mail**.
2. Select **Print Menu** from the list on the left.
3. Select **Date and Time Only**.
4. Print the date and time on the envelope or tape strip.

   - **If using the moistener**: Place envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.

   - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape strip.

   Note:

   Make sure you orient the mail piece so the date and time prints on a blank section of the mail piece.

   ---

5. Select **Exit Date and Time** when finished to return to the Mail screen.

Print an Advertisement and Text Only (no meter stamp)

1. From the Home screen select **Mail**.
2. Select **Print Menu** from the list on the left.
3. Select **Ad & Text Only**.
4. Select **Ad** to choose an ad.
5. Select **Text** to choose an existing test message or follow the prompts to create a new text message, and select it.

6. Print the ad and text on the envelope or tape strip.
   - **If using the moistener**: Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.
   - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape strip.
7. Select **Exit Ad & Text**.

Print an Advertisement, Text, Date, Time (no meter stamp)

1. From the Home screen select **Mail**.
2. Select **Print Menu** from the list on the left.
3. Select **Ad & Text & Date**.
4. Select **Ad** to choose and ad.
5. Select **Text** to choose a text line.
6. Print the ad, text, time and date on the envelope or tape strip.
   - **If using the moistener**: Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.
   - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape strip.
7. Select **Exit Ad, Text & Date** .

Add and Remove Advertisement at the Machine

Your machine comes preloaded with nine envelope ads:

- Address Service requested
- Return Service requested
- Seasons Greetings
- United States flag
- Recycle symbol
- Please Open Immediately

- Received
- First Class
- Veterans

Select an advertisement to print on your envelope

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left.
3. Select **Ad <Ad name>**. If an ad is already selected it will preview on the selection button.
4. Select **Select an Ad**.
5. Enter the ad number and select the **Return** key on the keypad *or* scroll through the ads and select one.

You are returned to the Mail screen with your ad selected.

Remove an advertisement:

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left.
3. Select **Ad <Ad name>**. If an ad is already selected it will preview on the selection button.
4. Select **Select an Ad**.
5. Select **0-None**.

You are returned to the Mail screen with no ad selected.

1. 1.

Add and Remove Inscriptions

Important:

The postal inscription that prints on the meter stamp is a separate setting from the postal class you choose when you rate your mail piece. You rate the mail piece as part of the procedure(s) for running mail. The inscription and the class should match for your mail piece. However, if you change one of these on your mailing machine, it does NOT automatically change the other. If you change the inscription be sure it matches the class you select when processing mail.

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left.
3. Select **Inscription**.
4. To choose a new inscription, select **Select an Inscription**.
5. You may either:
   - Enter the inscription number and select the **Return** key.
   - Scroll through inscriptions and then select the inscription.
6. You are returned to the Mail screen with the name of the inscription listed on the second screen.

Purchase Other Postal Inscriptions for Your Machine

Your machine comes pre-loaded with several postal inscriptions. Additional inscriptions can be purchased through Pitney Bowes, see *Pitney Bowes Contact List* Ink and Supplies. Once purchased, the ad can be downloaded directly into your machine by following the steps below.

1. From the Home screen select **Mail**.
2. Select the **Options** button from the list on the left.
3. Select **Connect to the Data Center**.
4. Select **Uploads & Downloads**.
5. You will see a series of messages indicating that your machine is dialing into the Pitney Bowes Data Center.
6. Once connected to the Pitney Bowes Data Center you are informed of any downloads available.
7. Follow the prompts to start the download(s) as necessary. Various screens will display, letting you know the status of the process.
8. When finished, select **OK** to return to the Mail screen.

Seal the Envelope Only - (bypass all printing)

1. From the Home screen select **Mail**.
2. Select **Print Menu** from the list on the left.
3. Select **Seal Only**.
4. Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit.
5. Slide the envelope to the right until the system takes; the system seals and ejects the piece.
6. When finished, select **Exit Seal Only** to return to the Mail screen.
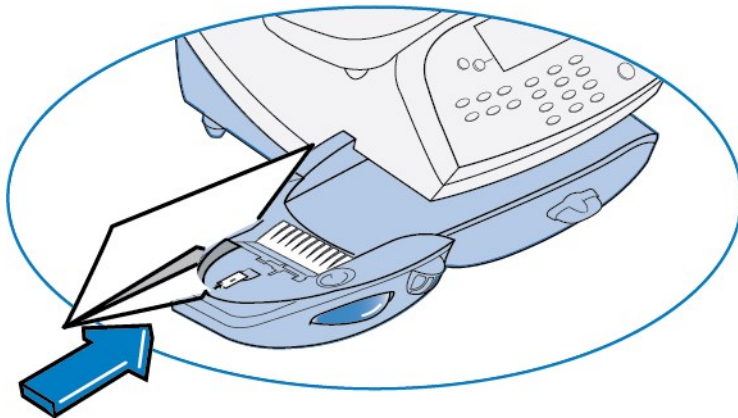
Adjust the Horizontal Print Position of the Meter Stamp

1. From the Home screen, select **Mail**.
2. Select **Print Menu** from the list on the left.
3. Select **Horizontal Print Postage**.
4. Enter the print distance from the right edge of the envelope to the meter stamp (from 3-24 mm).
5. When finished, select the **Return** key on the keypad. The new values are saved.

4 - Running Mail

In this section

Turn the Machine On and Off

Turn the Machine On/Off:

1. Push the **On/Off** switch on the back of the machine to power on or power off the system. The touchscreen will turn on and open to the Home screen when the machine is powered on.

Put the Touchscreen in Sleep Mode

1. Press the touchscreen **On/Off** switch *lightly* to put the touchscreen in sleep mode. Press it *lightly* again to waken it from sleep mode.

Note:

Pressing and holding the touchscreen power switch will power down the touchscreen only. It is strongly advised that you **do not power down the touchscreen** in this way. Allow the touchscreen to be powered on and off with the power switch on the back of the machine.

Check the Amount of Postage Available in Your Meter

1. From the Home screen select the **Mail**.
2. Select **Funds** from the list on the left.
3. The funds **available**, **used**, and **total pieces** processed are displayed.
   - **Available** – amount of funds (postage) left in your meter
   - **Used** – total of all postage ever used in the meter
   - **Total Pieces** – total number of mail pieces run through the meter with postage applied

Feed Envelopes and Tape Strips

This procedure can be used when you already know the weight of a mail piece and you are not using the integrated weighing platform.

Feed an Envelope Using the Moistener (sealing the envelope)

Use this method when you want or need to seal the envelope (mail piece).

1. Place envelope flap side down along the back wall of the moistener. Slide the envelope flap under the blue edge of the moistener unit.
2. Slide the envelope towards the right until the system grasps it.
3. The system prints and ejects the envelope.
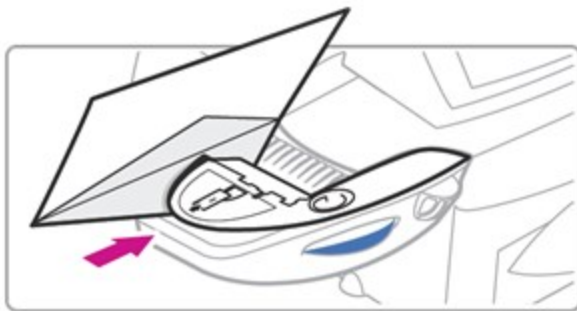
Feed an Envelope Without Using the Moistener (no sealing)

Use this method when you do not want or need to seal the envelope (mail piece).

1. Place the envelope up against the back wall of the feed deck.
2. Slide the envelope towards the right until the system grasps it.
3. The system prints and ejects the envelope.
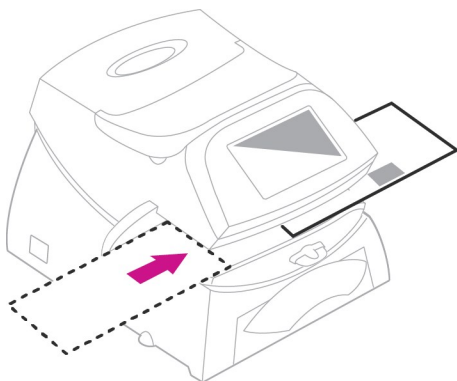
Feeding a tape strip

Use self-adhesive tape strip for mail pieces that are too thick or large to run through the meter. Refer to: *Material Specifications* for thickness requirements.

1. Place the tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints and ejects the tape.

Get a Postage Rate Preview

Use this to see what the postage will be for a mail piece, without metering the mail piece.

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left.
3. Select **Clear** (back arrow) once. This clears all rate and weight values. The date and $0.00 postage is displayed on the touchscreen.
4. Put the mail piece on the weighing platform.
5. Select **Class**.

6. Follow the prompts to assign the various options associated with that class.
7. Select **Done** when all options have been assigned.
8. The date and new postage amount will display on the touchscreen.

About Applying Postage to Mail Pieces

The amount of postage required for a mail piece is based on USPS regulations and includes the following factors:

- **Class of mail** (how fast you want the mail piece delivered)
- **Weight of the mail piece**
- **Shape of the mail piece** (for certain size letters and all packages)

Calculate Postage

There are three ways to calculate and apply postage to your mail piece.

Calculate and Apply Postage by Entering the Mail Piece Weight Manually

This procedure can be used when you already know the weight of a mail piece and you are not using the weighing platform. Refer to: *Apply Postage Entering Weight Manually*.

Calculate and Apply Postage by Using the Scale

The machine can calculate the postage required for the mail piece. Refer to: *Apply Postage Using the Scale.*

Calculate and Apply Postage by Use the Differential Weighing Mode

Differential weighing is an optional feature that allows you to place multiple items on the weighing platform, remove one item at a time, rate that item, and put postage on it. This is repeated until you have finished all of the items on the weighing platform. This procedure is usually done when you have multiple mail pieces with different weights but all using the same class for rating. Refer to: *Apply Postage Using Differential Weighing Mode*.

For All Weighing Modes

- **Large Pieces and Parcels** - It is recommended that you use the **Shipping Label** button to print carrier shipping labels for large pieces and parcels. Shipping discounts may be available by printing a full address shipping label through the Shipping application.
- **ZIP Codes and Zone Numbers** - The system allows you to enter either a ZIP code or a Zone number for those USPS classes and services that require a destination entry (e.g., Priority class over 1 lb). When prompted to enter a destination in these cases, you may either enter the one-digit Zone number (0-8) and select **This is a Zone** or enter the 5-digit ZIP code and select **This is a ZIP Code**.

> Note:
>
> You can calculate the postage amount for a mail piece without metering it. Refer to: *Get A Postage Rate Preview*.

Apply Postage Entering Weight Manually

This procedure can be used when you know the weight of a mail piece and are not using the integrated weighing platform.

1. From the Home screen select **Mail**.
2. Select **Weigh/Rate** from the list on the left.
3. Select **Enter weight manually**.
4. Select **Enter Pounds** and enter the pounds (maximum is 70 lbs).
5. Select the **Return** key on the keypad.
6. Select **Enter Ounces** and enter the ounces.
7. Select the **Return** key on the keypad.
8. Select **Continue**.
9. Scroll to **change or validate the mailing and account options**, and select **Done** when finished to save the options and return to the Mail screen.

10. Apply postage to the mail piece:
     - **If using the moistener**: Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.
     - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape strip.

Apply Postage Using the Scale

1. From the Home screen select **Mail**.
2. Select **Weight/Rate** from the list on the left.
3. Place a mail piece on the weighing platform.
4. Select **Rate mail on scale**.
5. Select the mail **Class**.
6. Select the **Package** type.
7. Select other options if presented and select **Done** when finished.
8. You can choose another account or use the account that is presented. If an account password was established, you will be prompted for it.
9. Apply postage to the mail piece:
    - **If using the moistener**: Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.
    - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape strip.

Apply Postage Using Differential Weighing Mode

Differential weighing is an optional feature that allows you to place multiple items on the weighing platform, remove one item at a time, rate that item, and put postage on it. This is repeated until you have finished all of the items on the weighing platform. This procedure is usually done when you have multiple mail pieces with different weights but all using the same class for rating.

1. From the Home screen select **Mail**.
2. Select **Weigh/Rate** from the list on the left.
3. Select **Differential weighing**.
4. Place all mail pieces on the weighing platform.
5. Remove one item from the weighing platform. The screen displays the default rating class and piece weight of the item removed.
6. Scroll to select all desired mailing class and account options if changes are desired.
7. When finished entering all the options, select **Done**. The class that you chose is now displayed along with the mail piece weight.
8. Apply postage to the mail piece:
    - **If using the moistener**: Place the envelope flap side down along the back wall of the moistener and slide the envelope flap under the blue edge of the moistener unit. Slide the envelope towards the right until the system grasps it.
    - **If not using the moistener**: Place the envelope or tape strip up against the registration wall of the system and slide it to the right until the system grasps it. The system prints the meter stamp and ejects the envelope or tape strip.
9. Repeat steps #4 -7 for each item that needs postage.
10. At the last piece of mail select **rate this item** and apply postage to the last mail piece.

Do You Need Add-On USPS Services?

If you want to use any add-on USPS services such as:

- Insurance
- COD
- Delivery Confirmation
- Signature Confirmation
- Certified Mail
- Return Receipt

You will need to contact your local Post Office to complete the postage process. You will have to attach specific labels and/or fill out forms and pay additional fees to include these services on your mail piece.

5 - Using the Preset Feature

In this section

About Presets

What are Presets

A preset stores commonly used values for settings like postage amount, class, advertisement, inscription, custom text or any special services. These value options will vary upon how your machine is configured. Your machine has two types of presets, Default and Custom.

Default Preset

The Default Preset comes pre-configured in your machine. This preset contains the most frequently used values for class and postage amount (First-Class Metered Mail with no additional options) (Lettermail with no additional options). These values appear on the touchscreen when you tap the Mail screen and when you select **Default Preset**. You can edit the Default Preset values. For more information refer to: *Change the Default Preset*

Custom Presets

Your machine can store up to 10 additional presets, called Custom Presets. Custom Presets cannot be edited once established; however, they can be deleted and a new Custom Preset can then be established. Refer to: *Define a New Custom Preset.*

Important: Always Include the USPS Class in the Preset

When setting up the preset, be sure to include the USPS class. This ensures that whenever there is a USPS rate change and you download the new rates to your mailing machine, your preset will be automatically updated with the new postage rate.

Default Preset Notes:

- The Default Preset must include a class
- You cannot modify the name of the Default Preset, but you can edit the values
- You cannot assign an account to the Default Preset (if you have enabled the accounting feature)
- *When a rate change becomes effective, always check the postage values assigned to all presets to make sure that they comply with the new rates*

Custom Preset Notes:

- There is no option to edit a Custom Preset, but you can define a new Custom Preset based on the current condition of the machine (and then delete your old Custom Preset).
- *When a rate change becomes effective, always check the postage values assigned to all presets to make sure that they comply with the new rates.*

View the Default Preset

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left. The first screen of defined values for the Default Preset is listed.
3. Scroll down to see the remainder of the defined values.

Set the Default Preset

The Default Preset comes pre-configured in your machine. This preset contains the most frequently used values for *postage amount* and *class*. Before editing the Default Preset you must first establish the new default settings that you want the preset to contain.

1. From the Home screen select **Mail**.
2. From the Mail screen, establish the settings that you want applied to the new Default Preset (such as postage amount, class, etc.) by scrolling through the various mailing options and making changes where desired. Be sure to include a USPS class.
3. When all desired mail options are assigned, select the **Custom Preset** button from the list on the left..
4. Select **Define Default Preset**.
5. You will be prompted to choose if all current values are correct:
   - If you select **Yes: Store Preset**, the values are saved as the new Default Preset values.
   - If you select **No: Review Values**, the system will display the current values and allow you to adjust the values.
6. Select **Continue** to return to the **Custom Presets** menu, or **Home** to return to the Home screen.

View Custom Presets

1. From the Home screen select **Mail**.
2. Select **Custom Preset** from the list on the left.
3. Scroll to and select **Select a Preset**. The display lists all presets.
4. Select the preset you want to view. The defined values for the Custom Preset are displayed.

Select a Custom Preset

1. From the Home screen select **Mail**.
2. Select **Custom Preset** from the list on the left.
3. Select **Select Preset**. The display lists all custom presets created on your system.
4. Scroll to see additional choices (if available).
5. Select the preset you want to use. You are returned to the Mail screen with the preset values chosen.
6. You can now run mail with those preset values applied.

Define a New Custom Preset

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left..
3. Establish the settings that you want applied to the new custom preset (such as postage amount, class, ad, insurance, etc.) by scrolling through the various mailing options and making changes where desired. Be sure to include a USPSclass.
4. Select **Done** when all mailing preset settings have been made.
5. Tap the **Custom Preset** button from the Mail screen.
6. Select **Define New Preset**.

7. You will be prompted to accept or review the values.
    - To *accept* the values select **Yes: Store Preset**and the system will prompt for the name of this preset.
        a. Enter a name for the preset (It can be up to twelve alpha/numeric characters long including spaces).
        b. When finished, select the **Return** key on the keypad. The new values are saved.
    - To *review* the values select **No: Review Values** and the values will be displayed.
        a. Select **Clear** (back arrow) once to return to the previous screen where you can choose to accept the values OR select **Clear** multiple times to return to the Mailing Options screen.
        b. Make any desired changes to the mailing settings.
        c. Select **Done** and continue from step 4.
8. Select **Continue** to return to the Custom Preset screen *OR* select **Home** to return to the Home screen.

Edit a Custom Preset Name

1. From the Home screen select **Mail**.
2. Select **Custom Preset** from the list on the left.
3. Scroll and select **Edit Preset Name**.
4. The display lists all the Custom Presets. Select the preset that you want to rename. The system will prompt for the new name of this preset.
5. Enter the new name. It can be up to twelve alpha/numeric characters long.
6. When finished, select the **Return** key on the keypad. The new name is saved and you are returned to the Custom Preset screen.

Delete a Custom Preset

Deleting a Custom Preset removes all the values assigned to it and removes it from the Preset Menu.

Note:

You cannot recover a deleted preset.

---

1. From the Home screen select **Mail**.
2. Select **Custom Preset** from the list on the left.
3. Select **Delete Preset**. The display lists all presets.
4. Select the preset you want to delete.
5. At the prompt to clear the preset, select **Yes**. The preset is deleted.
6. The system confirms that the preset has been deleted. Select **Continue** to return to the Custom Preset screen.

6 - Using Batch Count Feature

In this section

View the Batch Mail Count

Your system can keep track of batches of mail. You can use this feature to track the amount of mail going out per day, per week, per month, etc. The system stores the postage value and piece count information in a "batch register".

To view the batch count:

1. From the Home screen select **Mail**.
2. Select **Funds** from the list on the left.
3. The **Funds Available**, **Used** and **Total Pieces** processed counts are displayed.
4. To clear the batch count, refer to: *Clear the Batch Count*.

Funds Report

Field	Description
Used	The total of all postage ever used in the meter.
Available	The amount of postage remaining in the meter.
Total Pieces	The total number of mail pieces run through the machine that had postage applied.
Control Sum	The total of all postage refills for the meter and equals the amount **Used** plus **Available**. This is a postal requirement that verifies an accurate accounting of the postage in your meter.
Batch Count	The number of mail pieces that had postage applied since the last time the batch count was cleared.
Batch Value	The amount of postage applied since the last time the batch value was cleared.
PBP Serial No	The serial number of this meter (normally meter number).

Print the Batch Activity Report

A Batch Activity Report, also known as a Funds Report, allows you to print a record of how much postage has been used and how much is remaining in the machine.

1. From the Home screen select **Mail**.
2. Select **Funds** from the list on the left.
3. The **Funds Available**, **Used** and **Total Pieces** processed counts are displayed.
4. Scroll to select **Print Batch Activity**.
5. At the **Please insert envelope or tape sheet to print report** prompt, place an envelope or tape strip up against the back wall of the system and slide it to the right until the system grasps it. The Funds Reports is printed and the envelope or tape strip is ejected.

Funds Report	**Used:** $031.600 **Account No.:** 99999999 **Available:** $068.400 **Batch Count:** 3 MAY 26 13 4:33p **Total Pieces:** 29 **Batch Value:** $002.720 **Control Sum:** $100.00 **PBI Serial No.:** 1100024

Funds Report

Field	Description
Used	The total of all postage ever used in the meter.
Available	The amount of postage remaining in the meter.
Total Pieces	The total number of mail pieces run through the meter that had postage applied.
Control Sum	The total of all postage refills for the meter and equals the amount Used plus Available. This is a postal requirement that verifies an accurate accounting of the postage in your meter.
Batch Count	The number of mail pieces that had postage applied since the last time the batch count was cleared.
Batch Value	The amount of postage applied since the last time the batch value was cleared.
PBP Serial No	The serial number of this meter (normally meter number).

Clear the Batch Count

> Note:
>
> Make certain that you want to delete the batch count information. Once you do, you cannot restore the data.

1. From the Home screen select **Mail**.
2. Select **Funds** from the list on the left.
3. The **Funds Available**, **Used** and **Total Pieces** processed counts are displayed.
4. Scroll to select **Clear batch values**.
5. At the **Confirm Clear** prompt, select **Yes** to confirm. The batch value and batch piece registers return to zero. Selecting **No** returns you to the previous screen.

7 - Accounting

In this section

About Accounts

The Accounting feature on your machine allows you to track your postage costs by categories. These categories can represent whatever is appropriate for your organization - departments, people, locations, projects, etc. Tracking your mailing expenses by category allows you to manage and budget your postal costs in a more efficient manner.

The system provides the following accounting options:

- A name up to 12 alphanumeric characters long
- An account number
- Item total - the total number of pieces of mail charged to an account since it was last cleared
- Value total - the total amount of postage charged to an account since it was last cleared
- An account password (if set up) can run enhanced accounting features

Turn on the Accounting Feature

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Turn items ON/OFF**.
4. Select **Accounting**.
5. Select **Turn Accounting ON**. You are returned to the Mail screen.

Turn Off the Accounting Feature

Note:

You will not be tracking postage by account when this feature is turned off.

---

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Turn items ON/OFF**.
4. Select **Accounting**.
5. Select **Turn Accounting OFF**. You are returned to the Mail screen.

Create an Account

To create an account to track postage.

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Create an account**. If a Supervisor password has been enabled, you are prompted to enter it. Enter the 4-digit Supervisor password if necessary and select **Continue**.
4. The system will prompt for the name of this account. Enter a name for the account. It can be up to twelve alpha/numeric characters long. When finished, select **Continue**.
5. At the prompt to create another account, either
    a. Select **Yes** and go back to step 3 to enter another account.
    b. Select **No** to continue. You are returned to the **Accounts Management** menu.
6. Select **Clear** (back arrow) to return to the Mail screen.

Select an Account

You need to select an account when you process mail pieces to track postage when using Departmental Accounting.

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. From the Accounts Management screen, select **Select an Account** again.
4. Select an account from the list displayed, or enter the account number and select the **Return** key on the keypad.
5. If a password has been assigned to this account, you will be prompted to enter it. Enter the 4-digit password and select **Continue**.
6. You return to the Mail screen with the name of the account listed. You can continue processing mail for the assigned account.

Edit an Account Name

You can edit an account name.

1. From the Home screen select **Mail**.
2. Select **Select an Account**.

3. Select **Edit an account**.
4. If the Supervisor password has been enabled, you are prompted to enter it. Enter the 4-digit Supervisor password and select the **Return** key on the keypad. The Edit an Account screen displays.
5. Select an account from the list displayed, or enter the account number and select the **Return** key.
6. If an Account Password has been assigned to this account, you will be prompted to enter it. Enter the 4-digit Account Password and select **Continue**.
7. Select **Edit Account Name**.
8. Enter a new name when prompted and select the **Return** key.
9. You return to the Edit an Account screen.
10. Select **Clear** (back arrow) to return to the Accounts Management screen.
11. If you are finished editing accounts, select **Clear** (back arrow) to return to the Mail screen.

View Account Totals

You can view your account totals anytime using this option.

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Display Account Totals**.
4. Select an account from the list displayed, or enter the account number and select the **Return** key on the keypad.
5. If an Account password has been assigned to this account, you will be prompted to enter it. Enter the 4-digit Account password and select **Continue**.
6. The *account number and name*, *value of the postage used*, and *pieces* is displayed.
7. When prompted, insert an envelope or tape strip into the machine. The report is printed and you are returned to the **Printable Reports** menu.

Print the Single Account Report

This report provides the postage amount and number of pieces applied for a single account (if the Departmental Accounting feature is set up on your system).

To print an account report:

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Single Account Summary**.
4. Select an account from the list displayed, or enter the account number and select the **Return** key on the keypad.
5. When prompted, insert an envelope or tape strip into the machine. The report is printed and you are returned to the **Printable Reports** menu.

Account Report	**Acct Name:** Sales	1100024
		MAY 26 09
	Acct Number: 1	12:28p
	Pieces: 3	
	Postage: $024.550	

Description
Acct Name: Name assigned to this account when it was set up.
Acct Number: Number automatically assigned to this account when it was set up.
Pieces: Total mail pieces printed against that account.
Postage: Total postage charged against that account.

Multi-Account Summary Report

This report provides the postage amount and number of pieces applied for multiple accounts (if the Departmental Accounting feature is set up on your system).

To print an account report:

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Multiple Account Summary**.

4. When prompted, insert an envelope or tape strip into the machine. The report is printed and you are returned to the **Printable Reports** menu.

Account No.:	Pieces:	Postage:	1100024
1	5	$024.550	MAY 26 09
2	8	$067.470	12:28P
3	9	$009.600	
			Page 1 of 1

Account Summary

Description
Account No.: Number automatically assigned to the account at set up
Pieces: Total mail pieces printed against that account
Postage: Total postage charged against that account

Clear an Account

You can clear the postage totals on an account when necessary (for example, at the end of a fiscal year).

Important:

Make certain that you want to delete the account. Once you do, the account information is gone. We suggest you print an accounting report first, refer to: *Print a Multi-Account Summary Report* before clearing.

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Clear an account**. If a Supervisor password has been enabled, you are prompted to enter it. Enter the 4-digit Supervisor password if necessary.
4. When the Clear an Account screen displays select an account from the list displayed, or enter the account number and select the **Return** key.
5. At the *confirm clear* prompt, select **Yes** to clear the account or **No** if you change your mind. The account is cleared and you are returned to the **Accounts** menu.

Delete an Account

You can delete an account when necessary (for example, at the end of a fiscal year).

IMPORTANT:

Make sure you really want to delete an account. Once you do, the account information is gone. We suggest you print an accounting report first before deleting, refer to: *Print a Multi-Account Summary Report*.

---

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Delete an account**. If a Supervisor password has been enabled, you are prompted to enter it. Enter the 4-digit Supervisor password if necessary.
4. When the Delete an Account screen displays select an account from the list displayed, or enter the account number and select the **Return** key on the keypad.
5. At the *confirm delete* prompt, select **Yes** to delete the account, or **No** if you change your mind. The account is deleted and you are returned to the **Accounts** menu.

Turn On the Account Passwords Feature

Note:

You need to set up a Supervisor password, refer to:*Set Up or Disable the Supervisor Password* before you can enable Account passwords.

Account passwords allow for exclusive access to certain accounts which can be used to prohibit postage being applied against that account.

With the Account Passwords feature, every account must be assigned a password, therefore, you must go through the process of assigning a password to all existing accounts after you turn the Account Password feature on. New accounts will prompt you to assign one as part of the set up process if the Account Passwords feature is on.

Turn the Account Passwords Feature On

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Account Passwords**.

4. Select **Turn Passwords ON**. You are returned to the **Accounts** menu.

5. Continue with *Assign an Account Password* to set up account passwords for each existing account.

Turn Off the Account Passwords Feature

Note:

You need to set up a Supervisor password, refer to: *Set Up or Disable the Supervisor Password* before you can change Account passwords.

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

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Account Passwords**.
4. Select **Turn Passwords OFF**.
5. You are prompted to enter the Supervisor password. Enter the 4-digit Supervisor password. You are returned to the **Accounts** menu.

Assign an Account Password

You can assign a unique 4-digit password to an account.

1. From the Home screen select **Mail**.
2. Select **Select an Account**.
3. Select **Select an Account** again.
4. Select an account from the list displayed, or enter the account number and select the **Return** key on the keypad.
5. If a password has already been assigned to this account, and the Account Passwords feature is enabled, you will be prompted to **Enter Account Password**. You can choose to do nothing and select the **Clear** (back arrow) to return to the Select an Account screen to choose another account.
6. If no password has been assigned you will be prompted to enter the Supervisor Password. Enter the 4-digit Supervisor Password and select **Continue**.

7. Select **Edit Account Password**.
8. Enter a new Account password (4-digits) when prompted and select the **Return** key.
9. You are prompted to re-enter the new Account password.
10. Select the **Clear** (back arrow) to return to the Accounts Management screen.
11. If you are finished editing accounts, select **Clear** (back arrow) to return to the Mail screen.

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8 - Reports

In this section

About Reports

Your machine allows you to view and print reports for funds usage, postage refills, and other valuable data. Some reports are done right from your machine on an envelope or tape strip, others require an optional laser sheet printer.

For information on printing accounting reports, refer to: *Single Account Report*.

Note:

The type of reports available will vary depending on the options installed on your machine.

Available reports may Include:

- Postage Refill History
- Single Account Summary
- Multi-account Summary
- Account List Report (laser sheet printer required)
- Special Services
- Batch Activity (Funds) Report
- Meter Information (Configuration) Report
- Systems Setup Report (laser sheet printer required)
- Error History Report
- Rate Updates (Summary) Report

Print a Report on an Envelope or Tape Strip

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select the report you wish to print from the list.
4. When prompted, insert an envelope or tape strip into the machine. The report is printed and you are returned back to the Reports screen where you can choose to print another report.
5. Select **Clear** (back arrow) to return to the Reports screen, or **Home** to return to the Home screen.

Print a Report Using Laser Sheet Paper

1. From the Home screen select **Mail**.
2. Select **Reports**from the list on the left.
3. Select the report you wish to print from the list.
4. When prompted, ensure that a laser printer is connected to your system, and select **Continue**. The report prints.

Funds Report

A Funds report, also know as a Batch Activity report, allows you to print a record of how much postage has been used and how much is remaining in the machine.

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Batch Activity**.

4. When prompted, insert an envelope or tape strip into the machine. The report prints (see sample).

<table>
<tr><td rowspan="4">Funds Report</td><td>Used: $031.600</td><td></td><td>Account No.: 99999999</td></tr>
<tr><td>Available: $068.400</td><td>Batch Count: 3</td><td>MAY 26 13</td></tr>
<tr><td>Total Pieces: 29</td><td>Batch Value: $002.720</td><td>4:33p</td></tr>
<tr><td>Control Sum: $100.00</td><td>PBI Serial No.: 1100024</td><td></td></tr>
</table>

Field	Description
Used	Total amount of postage ever used in the meter
Available	Amount of postage left in the meter
Total Pieces	Total number of mail pieces run through the meter that had postage applied
Control Sum	Total of all postage refills for the meter and equals the amount Used plus Available
Batch Count	Number of mail pieces that had postage applied since the last time the batch count was cleared
Batch Value	Amount of postage applied since the last time the batch value was cleared
PBI Serial No.	Serial number of this meter (normally meter number)
Account No.	Your Postage By Phone system account number

Postage Refill Report

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Postage Refill History**.

4. When prompted, insert an envelope or tape strip into the machine. The report prints (see sample).

Field	Description
Date of Refill	Date of the refill
Time	Time of refill
Refill Amount	Amount of the refill
Account No.	Your Postage By Phone system account number
Meter No.	Serial number of this meter (normally meter number)
Printed	Date the report was printed

Rates Summary Report

This report lists information about your mailing machine and rate updates performed.

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select the down arrow until you can see **Rate Update History**.
4. Select **Rate Update History**.

5. When prompted, insert an envelope or tape strip into the machine. If it is a multi-page report you will be prompted to insert another envelope or tape strip.

<table>
<tr><td rowspan="5">Rates Summary</td><td>**Description**</td><td>**Version**</td><td>**Effective**</td><td>**Active**</td><td>**Meter No.:**</td></tr>
<tr><td>P7US800</td><td>A . 03</td><td>APR 10 16</td><td>Yes</td><td>8235000</td></tr>
<tr><td>P7US002</td><td>H . W1</td><td>JAN 17 16</td><td>Yes</td><td></td></tr>
<tr><td>P7US800</td><td>A . A1</td><td>Aug 28 16</td><td>No</td><td>AUG 05 16</td></tr>
<tr><td></td><td></td><td></td><td></td><td>3 : 23P</td></tr>
<tr><td></td><td></td><td></td><td></td><td>**Page 1 of 1**</td></tr>
</table>

Field	Description
Description	Specific type of rate
Version	Alpha-numeric identifier used for this rate
Effective Date	Date the rate takes effect
Active	Indicates if the rate is active (Yes or No)
Meter No.	The serial number of this meter

Print the Single Account Report

This report provides the postage amount and number of pieces applied for a single account (if the Departmental Accounting feature is set up on your system).

To print an account report:

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Single Account Summary**.
4. Select an account from the list displayed, or enter the account number and select the **Return** key on the keypad.

5. When prompted, insert an envelope or tape strip into the machine. The report is printed and you are returned to the **Printable Reports** menu.

<div style="border:1px solid red; color:red;">

Account Report

Acct Name: Sales	
	1100024
Acct Number: 1	MAY 26 09
Pieces: 3	12:28p
Postage: $024.550	

</div>

Description
Acct Name: Name assigned to this account when it was set up.
Acct Number: Number automatically assigned to this account when it was set up.
Pieces: Total mail pieces printed against that account.
Postage: Total postage charged against that account.

Multi-Account Summary Report

This report provides the postage amount and number of pieces applied for multiple accounts (if the Departmental Accounting feature is set up on your system).

To print an account report:

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Multiple Account Summary**.

4. When prompted, insert an envelope or tape strip into the machine. The report is printed and you are returned to the **Printable Reports** menu.

<div style="border:1px solid red; color:red">

Account Summary

Account No.:	Pieces:	Postage:	1100024
1	5	$024.550	MAY 26 09
2	8	$067.470	12:28P
3	9	$009.600	

Page 1 of 1

</div>

Description

Account No.: Number automatically assigned to the account at set up

Pieces: Total mail pieces printed against that account

Postage: Total postage charged against that account

Meter Information (Configuration) Report

This report lists configuration information about your machine and Postage By Phone account. It is generally a report you will not need unless your Pitney Bowes Customer Service Representative requests it.

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Meter Information**.
4. When prompted, insert an envelope or tape strip into the machine. The report prints.

<div style="border:1px solid red; color:red">

Cfg Report

PBP Serial No: 0011969	**PSD:** 09. 00. 00	SEP 28 08 9 : 25A
PBP Account: 99999999	**UIC:** 16 . 02	
PSD Ser. # 4C46000000007E4C	**Rate Mgr:** 04 . 02	**PCN:** P700
PrtHd No.: 50000104	**PHS:** 1 . 11	**SMR:** 000
Printer Ser.#: 999999999	**Platform:** D1.01	

</div>

System Setup Report

This report provides comprehensive information about your machine:

- serial numbers
- system versions
- funds and piece information
- warning values
- time settings
- advertisements
- inscriptions
- accounting setup
- modem setup
- scale settings
- presets

Note:

This report can only be laser printed, therefore, you will need to have a laser sheet printer attached to your machine.

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **System Setup Report**.
4. When prompted, ensure that a laser printer is connected to your system, and select **Continue**. The report is printed.

Account List Report (Standard Accounting)

This report provides the postage amount and number of pieces applied to all of your accounts (if the Departmental Accounting feature is set up on your system).

Note:

This report can only be laser printed, therefore, you will need to have a laser sheet printer attached to your machine.

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Account List Report**.
4. When prompted, ensure that a laser printer is connected to your system, then select **Continue** . The report prints.

Error Report

This report provides a history of error codes. It is generally a report you will not need unless your Pitney Bowes Customer Service Representative requests it.

1. From the Home screen select **Mail**.
2. Select **Reports** from the list on the left.
3. Select **Error History**.
4. When prompted, insert an envelope or tape strip into the machine. The report prints.

Error Date	Time	Identifier	Count	
JAN 28 08	8 : 32A	2025	001	0011969
JAN 06 08	8 : 15A	010E	008	JAN 10 16
DEC 10 07	7 : 47A	O300	004	9:25A
				Page 1 of 1

(left margin label: Error Report)

9 - Configuring Your Mailing Machine

In this section

About System Settings

You use system settings to customize your machine to accommodate the way you run mail. You can also add security to those features that are sensitive for your organization. System settings include:

Basic Settings

- Setting the Current (today's) Date
- Advancing the Date
- Adjusting the Contrast (of the display)
- Turning Features On or Off (if installed on machine)
- Setting Date, Time, and Timeouts
- Setting Postage Values (Funds Warnings)
- Setting Lock Code and Passwords
- Scale Options (accessed from the Home screen)
- Checking and Clearing the Batch Count

Advanced Settings

- Manage USPS® Confirmation Delivery Records. *Contact Pitney Bowes* for more information on this feature.
- Maintenance Mode
- Change Language
- Meter Withdrawal (for withdrawing postage funds)
- Run Install Mode (for special purposes only)

Change the Printed Date on SendPro 300

Note:

You can set the time back as early as the beginning of the current day, and you can advance the time up to 24 hours (which means you are in the next day).

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Advance the date.**
4. The current date will display. Either:

   - Select **Add one day** to advance the date one day each time you press it, OR
   - Select **Enter days to add (1-30)** to advance more than one day.

5. Select **Save and Continue**. The new date now appears on the Home screen.
6. To set the date on your mail back to the current date, select **Options** and select **Set to today's date**. You will be returned to the Home screen with the current date set.

Turn Features On and Off

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Turn items ON/OFF**.

4. Select the item that you want to turn on or off and follow the prompts.

- **Accounting** – This turns on or off the Accounting function. Refer to: *About Accounts*.
- **Account Passwords** – This turns on or off the requirement for operators to enter passwords when choosing a departmental account. Refer to: *Turn On/Off the Account Passwords Feature*.
- **Auto-Rating** – With Auto-rating on, the system will show you the available ***classes and associated prices*** for the mail piece on the weighing platform. With this feature off, the system will show you the available ***classes*** for the mail piece on the weighing platform, but ***not*** the prices.
- **Special Services** – This allows you to customize prompts for the USPS® Confirmation Services feature. Items include:
  - **Prompt Receipt**: Turns on or off the prompt to print a receipt after uploading your USPS® Confirmation Services records
  - **Upload Records**: Turns on or off the prompt to upload your USPS® Confirmation Services records
  - **Records Warning**: Turns on or off the prompt that notifies you when a specified number of USPS® Confirmation Services records has been reached in your system. Enter a number between 1 and 200, and tap the **Return** key.
- **Scale Stabilizer** – This turns on or off the scale stabilizer feature, which minimizes reactions to scale vibrations. You may use this feature in environments where there is blowing on the weighing platform, accidental bumps to the weighing platform or machine, or dropping of mail onto the weighing platform or machine. Refer to: *Enable Scale Stabilizing*.

Set the Date, Time and Timeouts

You can change the system default date/time to daylight savings time, change the time at which your system advances the date/time to the next day, and set the amount of time your system can remain inactive before reverting to the normal preset values.

Here are the basic setting options:

- Normal Preset, refer to: *Set the Default Preset Time*
- Sleep Mode, refer to: *Sleep Mode Activation Time*
- Autodate Advance, refer to: *Set the Autodate Advance*
- Correct Drift, refer to: *Correct Drift*
- Daylight Savings, refer to: *Set Daylight Savings Time*

Set the Default Preset Time

The Default Preset contains the most frequently used values for class and postage amount (First-Class Metered Mail with no additional options). These values appear on the touchscreen when you tap the Mail screen and when you tap the Default Preset button. Your machine display automatically returns to the Default Preset screen after a set period of time. You can set the amount of time the display takes before it reverts to the preset.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Time and Timeouts**.
4. Select **Default Preset**.
5. Enter the amount of minutes (from 1 to 240). When finished, select the **Return** key on the keypad. The new time is saved.
6. Select **OK**. You return to the **Time and Timeouts** menu.
7. Select **Clear** to return to the **Options** Menu.

Set Sleep Mode Activation Time

You can set the amount of time the machine waits until entering "sleep mode". When the machine is in sleep mode, the display is blank and you can't process mail. You can wake the machine by tapping lightly on the touchscreen.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Time and Timeouts**.
4. Select **Sleep Mode**.
5. Enter the amount of minutes (from 1 to 240) before the system goes into sleep mode.
6. Select **OK**. You return to the **Time and Timeouts** menu.
7. Select **Clear** (back arrow) to return to **Options** menu.

Set the Autodate Advance

The feature is factory set to 12:00 AM. This means that at 12:00 AM the system advances the date of the meter stamp to the new date.

You can set the system to advance the date of the meter stamp at 12:00 PM (afternoon) instead. With this setting, it allows you to meter mail in the afternoon for the next day's mailing if your mail is sent out in the morning.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Time and Timeouts**.
4. Select **Autodate Advance**.
5. Tap the empty text box at the top of the screen. The keypad opens.
6. Enter a new time (i.e., 11:59)
7. Select the **Return** key on the keypad to save your entry.
8. Select **Switch AM/PM**. The time will display at the top of the screen with AM or PM assigned.
9. To save the time you entered, select **Save Auto Date Advance Time**. To disable the autodate advance, select **Disable Auto Date Advance**.
10. Select **Clear** (back arrow) to return to **Options** menu.

Correct Drift

Sometimes, the time on the machine may need to be adjusted due to internal "drift" or the activation of Daylight Saving Time.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Time and Timeouts**.
4. Select **Correct Drift**.

5. You have your choice of adding or subtracting minutes from the current time displayed.
    - **To Add Minutes** – Select **Add 1-120 min** to add minutes.
      Enter the number of minutes you need to add and select **Continue**.
    - **To Subtract Minutes** – Select **Subtract 1-120 min** to subtract minutes.
      Enter the number of minutes you need to subtract and select **Continue**.

    You return to the **Time and Timeouts** menu.

6. Select **Clear** (back arrow) to return to **Options** menu.

Set the time on the SendPro 300

To update date the time by 120 minutes or less:

1. From the home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select the down arrow.
4. Select **Time and Timeouts**.
5. Select **Correct Drift**.
6. Set time ahead or behind:
    - Select **Add** 1 - 120 min to *set the time ahead*
    - Select **Subtract** 1 - 120 min to *set the time behind*
7. Select the box, enter the number of minutes, and select **Return**.

To update the time by more than 120 minutes, you will need to run install mode and set the time. For details, see *Install Mode Options*.

Set Daylight Savings Time

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Time and Timeouts**.
4. Select **Daylight Saving**.
5. Select **Enable** to use Daylight Saving Time or select **Disable** if you don't use Daylight Saving Time. Your selected setting is saved and you return to the **Time and Timeouts** menu.
6. Select **Clear** (back arrow) to return to **Options** menu.

Set the Low Funds Warning

You can have the machine warn you when the postage (funds) available in your machine reaches a certain amount. This warning acts as a reminder for you to add more postage to your machine. For information on adding postage refer to: *Add Postage to Your Machine*.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Postage Values**.
4. Select **Low Funds Amount**.
5. Enter the amount you want (in whole dollars only).
6. Select **OK**. The Low Fund Amount is saved.
7. Select **Clear** (back arrow) to return to **Options** menu.

Turn the Scale On or Off

With the scale ON the scale is set to always rate a mail piece that is placed on the weighing platform. With the scale OFF you need to select **Weigh/Rate** to turn the scale on, to rate a mail piece.

1. From the Home screen select **Mail**.
2. Select **Clear** (back arrow) until the **Select an Account**, **Class**, and **Scale** options display.
3. Select **Scale**.
4. Select **Turn Scale On** (if scale is currently set to off) or **Turn Scale Off** (if scale is currently set to on). You are returned to the Mail screen.

Set the Scale Options

There are several options you can set with your scale such as:

- Zeroing the weight on the scale
- Turning the scale on/off
- Viewing metric weights
- Saving/changing class or ZIP settings when weight changes on your scale.
- Enabling the Scale Stabilizer feature. (Accessed through **Options**.)

To access most of these scale options (except for the Scale Stabilizer feature) select **Scale** from the Default Preset screen and follow the prompts.

Zero the Scale

You can reset the scale to zero to lessen the chance of accidentally printing the wrong postage.

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left.
3. Select the **Scale** button.
4. Select **Zero the scale**.
5. The scale will zero out the weight and you are returned to the Mail screen.

View Metric Weight

You can choose to display a weight in metric values (grams or kilograms) as needed. This is helpful when you are using the internal rating feature and need to record t he weight of an item that is being mailed (shipped) to a country whose rates are based on metric values.

1. From the Home screen select **Mail**.
2. Select **Default Preset** from the list on the left.
3. Place a mail piece on the weighing platform.
4. Select **Scale**.
5. Select **View metric weight**; the current weight displays in grams.
6. Select **Continue** to return to the Mail screen.

Set the ZIP Code Selection Requirement for Each Mail Piece Weighed

You can set the machine to require a ZIP code selection each time a mail piece is weighed for processing.

1. From the Home screen select **Mail**.
2. Select **Clear** (back arrow) until the **Select an Account**, **Class**, and **Scale** options display.

3. Select **Scale**.
4. Select **Change/Retain ZIP**. The current setting is listed at the top of the screen.
5. Select either:
   - **Change ZIP** if you want to require a ZIP code selection, *OR*
   - **Retain ZIP** to not require a ZIP code selection; the new setting is at the top of the screen
6. Select **Clear** (back arrow) to return to the Mail screen.

Set the Class Selection Requirement for Each Mail Piece Weighed

You can set the machine to require a Class selection each time a mail piece is weighed for processing. You may want to use this feature if you want to select a class each time a mail piece is weighed.

1. From the Home screen select **Mail**.
2. Select **Clear** (back arrow) until the **Select an Account**, **Class**, and **Scale** options display.
3. Select **Scale**.
4. Select **Change/Retain Class**. The current setting is listed at the top of the screen.
5. Select either:
   - **Change Class** if you want to force a class selection *OR*
   - **Retain Class** to not require a class selection; the new setting is at the top of the screen
6. Select **Clear** (back arrow) to return to the Mail screen.

Enabling Scale Stabilizing

In a typical office environment you may encounter ventilation systems occasionally blowing on the scale, accidental bumps to the scale and/or platform, and people dropping mail onto the platform. This could result in unstable weight readings and frequent scale re-zero operations. You can minimize these disturbances by enabling the scale stabilizing feature.

> Note:
>
> Enabling this feature could cause a slight delay in scale response.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Turn items ON/OFF**.
4. Select **Scale Stabilizer**.
5. The current setting is listed on the screen. Follow the prompts to change the setting.
6. Select **Clear** (back arrow) to return to the Mail screen.

Install Mode Options

Running "Install Mode" allows you to review, and change if desired, most of the values that were selected when the machine was first installed. If you no longer have a copy of the SendPro™ 300 Installation Setup Instructions (AW32067) that came with your machine, you can download one from our website, *www.pitneybowes.com*.

> Note:
>
> Do not run this option unless directed to do so by your Pitney Bowes representative.

To run the install mode:

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Advanced Features**.
4. Select **Run Install Mode**.
5. Enter the hours and select **Return**.
6. Select **OK** and **Continue**.
7. Enter the minutes and select **Return**.
8. Select **OK** and **Continue**.
   - *If the time is incorrect*, select **Adjust the Time** and reenter the hours
   - *If the time is correct*, select **Time is Correct**.
9. Insert and envelope to print a test print.
   - If the test pattern *has breaks or the print is uneven*, select **NO**. A purge happens and returns you to this step (print a test print).
   - If the test pattern *has no breaks or uneven printing*, select **YES**.

10. When the message "Installation Success! Install complete" appears, select **OK**.
11. Enter the scale location code and select **Return**. (Refer to *Scale Codes for locations in the United States* for scale location codes.)
12. Select **Continue**.

10 - Passwords

In this section

About Passwords and Meter Functions

Passwords can be set up on the machine to prevent unauthorized access to the machine and/or to a specific account.

- **Lock Code** - a 4-digit password that prevents unauthorized access to your system after the machine has been powered up and/or has entered sleep mode. Refer to: *Set or Disable the Lock Code*.
- **Supervisor password** - can be used to prevent unauthorized account changes within the accounting feature. If you establish a Supervisor Password, a user will need to enter this password to add, edit, or delete accounts and to clear account totals. For information on setting up a Supervisor Password. Refer to: *Set or Disable the Supervisor Password*.
- **Account password** - can be used to prohibit postage being applied against that account. For information on setting up a password for an account. Refer to: *Turn On the Account Passwords Feature*.

Set, Change or Disable the Supervisor Password

A supervisor password can be used to prevent unauthorized account changes within the Departmental Accounting feature. If you establish a supervisor password, a user will need to enter this password to add, edit, or delete Departmental Accounts and to clear Departmental Account totals.

> Note:
>
> You need to set up a Supervisor Password also if you want to enable Account passwords. Refer to: *Edit Account Name and Password.*

Set the Supervisor Password

A supervisor password can be used to prevent unauthorized account changes within the accounting feature. If you establish a supervisor password, a user will need to enter this password to add, edit, or delete accounts and to clear account totals.

The supervisor password also prevents unauthorized access to your system after the machine has been powered up and/or has entered sleep mode.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Passwords**.
4. Select **Supervisor Password**. *(If you are not prompted to enter the current supervisor password, then no supervisor password is currently set.)*
5. Choose whether to create, change or disable the supervisor password:
   - To **create** a supervisor password, select the box, enter a new 4-digit password and press the right arrow. When prompted, re-enter the new password again to confirm and press the right arrow.
   - To **change** the supervisor password, select **Change Password**. Enter a new 4-digit password and select **Continue**. Re-enter the new password again to confirm.
   - To **disable** the supervisor password, select **Disable Password**.
6. Select **Continue**. The password is now saved and enabled.
7. Select **Clear** (back arrow) to return to **Options** menu.

> Note:
>
> - If you have set up a password for an account when using the *optional accounting feature* you can enter the Account Password instead of the Supervisor Password to gain access to the machine. Using the Account Password does not allow access to certain features within the menu like; Postage Refill, Change Accounts, and Accounting Functions and Change Setup.
> - Refer to: *About Passwords* for a comparison of access rights provided by the Supervisor Password and the Account Password.

Set Up or Disable the Lock Code

The lock code prevents unauthorized access to your system after the machine has been powered up and/or has entered sleep mode.

Set Up the Lock Code

When the machine is initially set up you can assign a lock code.

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11 - Adding Postage to Your Meter

In this section

Check Postage Funds in the Meter

Postage is stored internally in your meter. When you need to add more, you establish communications between your meter and the Pitney Bowes Data Center, and specify the amount of postage you wish to download. The postage is electronically transferred to your meter from your Pitney Bowes Postage By Phone meter payment account.

You must have a Pitney Bowes Postage By Phone meter payment account and have funds available in it before you can download the funds (for postage) to your meter. If you need to establish a Postage By Phone account *contact Pitney Bowes*.

You can check the funds (postage) in your meter.

1. From the Home screen select **Mail**.
2. Select **Funds** from the list on the left.
3. The **Funds Available**, **Used** and **Total Pieces** processed counts display.

Term	Description
Available	The amount of funds (postage) left in your meter.
Used	The total of all postage ever used in the meter.
Total Pieces	The total number of mail pieces run through the meter that had postage applied.
Active	Indicates if the rate is active. *Yes* if active, *No* if inactive.

Check Postage By Phone® Account Balance

Postage By Phone funds are the funds that you have available for download in your account through the Data Center. The Postage By Phone balance does not include funds already in your meter.

The following method describes how to check the balance of funds available to you through the Pitney Bowes Data Center.

1. Make sure that your machine can make the connection to the Data Center.
2. From the Home screen select **Mail**.
3. Select **Add Postage** from the list on the left.
4. Select **Check PbP balance**.

5. The machine connects to the Pitney Bowes Data Center. The **Prepaid** and **Other** balances display.
6. You have the option to Refill Postage.
   - Select **Yes** to refill your Postage By Phone account now.
   - Select **No** if you do not want to refill your Postage By Phone account at this time. Selecting **No** will give you the option to perform a meter update if one was not recently performed. You can:
     - Select **Get Update Now**.
       a. An update is performed.
       b. Select **Continue** to return to the Mail screen.
     - Select **Skip: Get Update Later** to return to the Mail screen.

Add Postage to Your Meter (Mailing application only)

Postage By Phone funds are the funds that you have available for download to your meter from your account on the Pitney Bowes Data Center. You can add postage to your meter any time as long as you have enough funds in your Postage By Phone account and your meter is connected to the internet.

> Note:
>
> Postage funds are available for printing meter stamps, created from the Mail application, on envelopes or tapes. These funds cannot be used for postage due on shipping labels created within the Shipping Label application.

1. Make sure that your machine can make the connection to the Data Center.
2. From the Home screen select **Mail**.
3. Select **Add Postage** from the list on the left.

4. Select :
   - **Refill $200.00** to add $200.00 to your meter from your Postage By Phone account.
     a. You are prompted to print a receipt.
        - Select **Yes** to print a receipt. Insert an envelope or tape strip into the machine.
        - Select **No** or do nothing and you will return to the Mail screen.
   - **Add another amount** to enter in a different amount to be downloaded to your meter.
     a. Enter in the desired amount of funds and select the **Return** key on the keypad.
     b. When you are prompted to print a receipt:
        - Select **Yes** to print a receipt. Insert an envelope or tape strip into the machine.
        - Select **No** or do nothing and you will be returned to the Mail screen.

| Refill Receipt | Postage in Meter: $071.120
Prepaid on Account: $999.000
Credit Line Available: $999.000 | Refill Amount: $050.000

MAY 26 09
10:25A
Account No.: 99999999
Meter No.: 1100024 |

Field	Description
Postage in Meter	Amount of postage (funds) in your meter.
Prepaid on Account	Amount you have left in your Postage By Phone system account of those funds you paid for in advance (by sending in a check, direct withdrawal, etc.).
Credit Line Available	Amount you have left in your Postage By Phone system account of those funds you established as credit with Pitney Bowes (such as Purchase Power®, etc.).
Refill Amount	Amount of your refill.
Account No.	Your Postage By Phone system account number.
Meter No.	Your meter serial number (on record with USPS), which is printed on the meter stamp.

Withdraw Postage Funds from the Meter

For a meter withdrawal, you need to move the remaining balance of postage from your meter into your Postage By Phone Account. Normally this is done if you are no longer going to use the meter.

Contact Pitney Bowes before withdrawing funds.

1. Be sure the machine is connected to the Pitney Bowes Data Center to withdraw funds.
2. From the Home screen select **Mail**.
3. Select **Options** from the list on the left.
4. Select **Advanced Features**.
5. Select **Meter Withdrawal**.
6. Select **Transfer all funds**. The system connects to the Pitney Bowes Data Center (this may take a few moments). The screen displays the status of the process.
7. When the Transfer Successful screen displays select **Continue**.
8. At the **Print Funds Report?** prompt , select **Yes** and insert an envelope or tape strip into the machine.

Funds Report			
			JAN 07 08 9:55P
	Used:	$464 . 270	
	Available:	$000 . 000	**Batch Count:** 733
	Total Pieces: 735		**Batch Value:** $464 . 270
	Control Sum: $464 . 270		**PBP Serial No.:** 0011969

Note:

"Available" should show a zero ($000.000) dollar amount.

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12 - Meter Updates and Inspections

In this section

About Meter Updates

When you connect to the Pitney Bowes Data Center to add postage or perform other transactions, the Data Center may activate other downloads while the machine is connected.

Available Updates

If a system or postal update is available the system displays a message:

- If an update is *not mandatory* you are prompted to either **Get Update now** or **Skip: Get later**.
- If an update is *mandatory*, only "**Get Update now**" displays and you must perform the download.

Update Complete

A message displays when the update is complete:

- If you need to reboot the system, the **Restart now** prompt displays. Select this to restart the system.
- If it is not necessary to reboot, select **Continue** to return to the Home screen.

> Important:
>
> Do not remove power to the machine or disconnect the Internet connection to the Pitney Bowes Data Center during a system upgrade or rates download.
>
> Wait until the meter has finished processing before disconnecting the meter. You will know this has occurred when the meter's Home screen showing postage and date displays.

Types of Downloads and Updates Available

System Update

If there has been an important update to your system, you will be notified that a required update is necessary when you connect to the pitneybowes.com Data Center. To initiate a system update: *manually download new postal rates.*

Envelope Ads/Postal Inscriptions

If you ordered new envelope advertisements or postal inscriptions, you will be able to download them when you connect to the pitneybowes.com Data Center. To initiate a download for new ads or postal inscriptions, follow the steps on how to: *Download Advertisements and Inscriptions.*

Upload Pending Electronic USPS Confirmation Services Records

If you are using the optional USPS Confirmation Services feature, your services records can be uploaded to USPS® for processing.

Postal/ZIP Code Update

Metered mail must bear the Postal Code location of the post where the meter (Postal Security Device) is registered. If you change the Postal Code location for your meter, report the change to Pitney Bowes and the meter is updated the next time you log in to check your Postage by Phone account balance. Refer to: *Check Postage By Phone® Account Balance* for information on connecting.

Postal Rate Update

Refer to: *About Postal Rate Changes* for information and details.

Postal Inspection

Refer to: *Perform Meter Inspections* for information and details.

About Postal Rate Changes

Postal rates change periodically by the USPS. If new rates are available, you can download them quickly and easily, directly from the Pitney Bowes Data Center. The new rates are normally available for download at least seven days before the effective date.

The display tells you when a Rate Change update is complete. It also tells you if the update is immediate or takes effect at a later date by listing the new date. Once the effective date is reached, the system automatically switches to the new rates.

Please be advised:
- If you download the update and the rates go into effect in the future, you will not print postage with the new rate until the new rates become effective.
- If the rate is changing and is effective immediately, a screen displays showing the present preset postage and prompts you to reset the normal preset postage. Select **Yes**. A screen displays for you to enter the new rate.

- When a Rate Change update takes place it may also affect the preset values in your mailing machine. Check all of the preset settings to insure that it conforms to the new rates. Refer to *Use the Preset Feature* for more information.

If you need to restart an interrupted download or initiate a download for rate updates, system updates, inscriptions or ads, refer to steps on how to: *Manually Download New Postal Rates.*

Manually Download New Postal Rates

Use this procedure to initiate a download for postal rate updates.

1. Verify that your machine is connected to the Pitney Bowes Data Center.
2. From the Home screen select **Mail**.
3. Select **Options** from the list on the left.
4. Select **Connect to the Data Center**.
5. Select **Uploads & Downloads**.You will see a series of messages indicating that your machine is dialing into the Pitney Bowes Data Center.
6. When you connect you are informed of any downloads available. Follow the prompts to start the download(s) as necessary. Various screens display, indicating the status of the process.
7. When finished, select **OK** to return to the Mail screen.

Manually Download System Updates

Use this procedure to initiate a download for system updates.

1. Verify that your machine is connected to the Pitney Bowes Data Center.
2. From the Home screen select **Mail**.
3. Select **Options** from the list on the left.
4. Select **Connect to the Data Center**.
5. Select **Uploads & Downloads**. You will see a series of messages indicating that your machine is dialing into the Pitney Bowes Data Center.
6. When you connect you are informed of any downloads available. Follow the prompts to start the download(s) as necessary. Various screens display, indicating the status of the process.
7. When finished, select **OK** to return to the Mail screen.

Download Advertisements and Inscriptions

Use this procedure to initiate a download for advertisements and inscriptions that you have purchased.

1. Verify that your machine is connected to the Pitney Bowes Data Center.
2. From the Home screen select **Mail**.
3. Select **Options** from the list on the left.
4. Select **Connect to the Data Center**.
5. Select **Uploads & Downloads**. You will see a series of messages indicating that your machine is dialing into the Pitney Bowes Data Center.
6. When you connect you are informed of any downloads available. Follow the prompts to start the download(s) as necessary. Various screens display, indicating the status of the process.
7. When finished, select **OK** to return to the Mail screen.

Restart an Interrupted Download

Use this procedure to restart an interrupted download for postal rates, system updates, advertisements or inscriptions.

1. Verify that your machine is connected to the Pitney Bowes Data Center.
2. From the Home screen select **Mail**.
3. Select **Options** from the list on the left.
4. Select **Connect to the Data Center**.
5. Select **Uploads & Downloads**. You will see a series of messages indicating that your machine is dialing into the Pitney Bowes Data Center.
6. When you connect you are informed of any downloads available. Follow the prompts to start the download(s) as necessary. Various screens display, indicating the status of the process.
7. When finished, select **OK** to return to the Mail screen.

Manually Perform Meter Inspections

The USPS requires a postal inspection of your machine every 120 days.

The Canada Post requires a postal inspection of your machine every 90 days.

Meter Inspection Prompts

When your machine's display prompts:

- **Inspection Due**: you have 30 days to print postage but it is recommended that you connect to the Pitney Bowes Data Center at this time to allow the inspection.
- **Inspection Required**: you will not be able to use your mailing machine until your system is inspected. Connect to the Pitney Bowes Data Center to satisfy the postal inspection requirement.

This postal inspection requirement can be automatically met by connecting to the Pitney Bowes Data Center to check your Postage By Phone account balance or to add postage to your meter. Even though this procedure is the same as checking your Postage By Phone account balance, it satisfies the USPS inspection requirements.

1. Make sure your machine can make connection to the Data Center.
2. From the Home screen select **Mail**.
3. Select **Add Postage** from the list on the left.
4. Select **Check PbP balance**.
5. The Prepaid and Other balances displays. Select **No** when prompted to perform a refill.
   - If there are no updates for your system, you return to the Home screen.
   - If there are updates available you have the option to:
     - **Get Update Now**: the update begins and you are returned to the Mail screen when it is complete.
     - **Skip: Get Update Later**: you are returned to the Mail screen.

13 - Maintenance

In this section

Ink Cartridge Replacement Messages

Your actual ink usage will vary, depending on whether you routinely print ads, the number of pieces of mail you print a day and other factors. The following messages regarding ink supply status appear on the machine display:

Note:

Be sure to keep a spare ink cartridge on hand at all times.

"Low Ink"

Replace the ink cartridge soon. You can print about another 300 impressions or leave the system running for six days without printing. If you don't have a replacement cartridge on hand, you should order one now. Refer to: *Contact Pitney Bowes* for information on ordering supplies.

"Ink Out"

Replace the ink cartridge immediately. The ink supply is gone. You will not be able to print any postage.

"Waste Tank - Tank is Nearly Full"

Call the Pitney Bowes Supply Line and order a waste ink pad replacement kit. Refer to*: Contact Pitney Bowes* for more information. You will be able to print postage in this condition, but only for a limited time.

"Waste Tank Full"

The waste ink tank is full. If you haven't already, call the Pitney Bowes Supply Line and order a waste ink pad replacement kit. Refer to*: Contact Pitney Bowes* for more information. You will not be able to print postage in this condition.
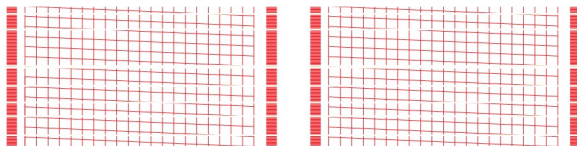
Print a Test Pattern

Printing a test pattern lets you see if the print head is functioning properly or if you have enough ink in the cartridge.

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select the down arrow until you get to **Advanced Features**.
4. Select **Maintenance Mode**.
5. Select **Printer Maintenance**.
6. Select **Test Print**.
7. Assess the test pattern.
   - If the test pattern looks like the *good test print sample* below (no missing lines):
     a. Select **Yes**. You *do not* need to perform a print head cleaning procedure.
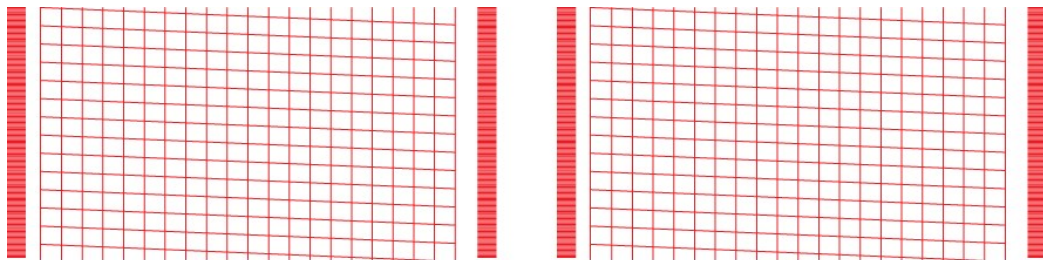
   - If the test pattern looks like the *poor test print sample* below (missing and broken lines):
     a. Select **No**. The machine executes an automatic print head cleaning.
     b. When the print head cleaning is complete, you are prompted to print another test pattern.
     c. If the test pattern is good, select **Yes**.

Note:

- If no pattern prints, check to see if there is ink in the cartridge. *Change the cartridge if necessary*.
- If no pattern prints and the ink cartridge has ink, *replace the print head*.

Purge the Print Heads

If you get a *poor test print pattern*, purge the printer heads to see if this fixes the problem. To purge the print heads:

1. From the Home screen select **Mail**.
2. Select **Options** from the list on the left.
3. Select **Advanced Features**.
4. Select the down arrow until you get to **Maintenance Mode**.
5. Select **Printer Maintenance**.
6. Select **Purge**.
7. You have a choice of four purge types(Purge A, B, C and D). Select **Purge A** unless directed by a Pitney Bowes agent to do otherwise. Purge A is usually sufficient to purge the system.

   Once the purge is selected the system executes the purge; this may take a few moments.

8. When finished, you are prompted to answer if the test pattern is OK.
   - If the test pattern is OK, select **Yes**. You are returned to the Printer Maintenance screen.
   - If the test pattern is *not* OK, select **No**. The machine initiates another purge.
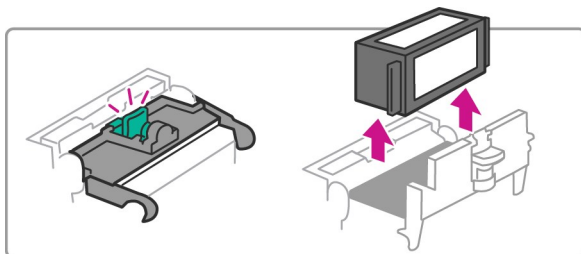
Replace the Print Head

Important:

This procedure should only be done under the direction or with the permission of a Pitney Bowes representative. This procedure can also be used to reset the print head in response to a possible error condition.

1. Remove the weighing platform by lifting it straight up.
2. Open the top cover.
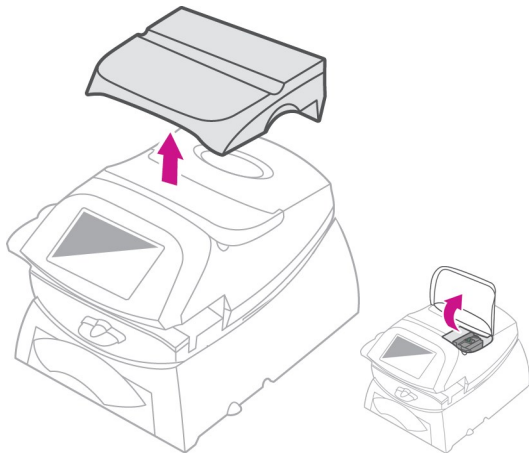
3. From the Home screen select **Mail**.
4. Select **Options** from the list on the left.
5. Select **Maintenance Mode**.
6. Select **Printer Maintenance**.
7. Select **Replacement**.
8. Select **Replace Print Head**. This moves the print head and ink tank cartridge into position.
9. Slide the green lever to the right and unlatch the ink tank cartridge guard; flip the guard open.
10. Lift up and remove the ink tank cartridge and set aside.

11. Squeeze in on the two gray tabs on either side of the print head so that they slide toward each other. While squeezing, lift and tilt the print head to the right toward the space for the ink tank cartridge. The print head should lift up and out of the machine.
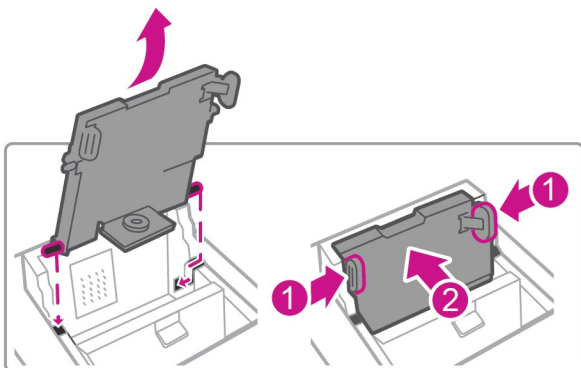
12. Remove the new print head from the packaging. Remove the protective tape or the black cap from the bottom of the new print head.
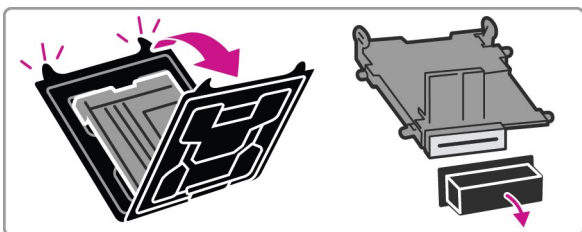
13. Align the tabs in the print head with the lower set of groves in the machine. Squeeze the tabs and push the print head flush against the walls until it secures in place.
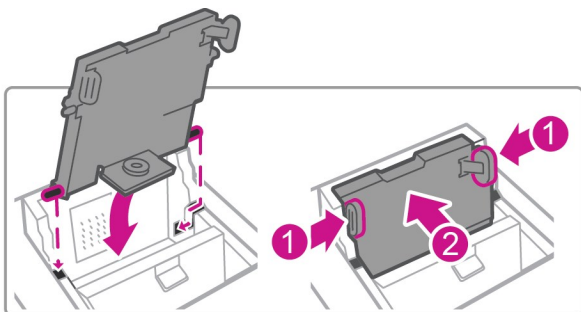
14. Replace the ink cartridge and close the ink tank cartridge guard.
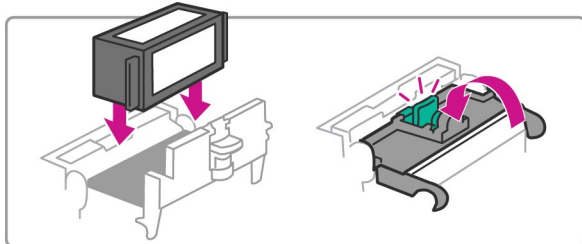
15. Close the top cover and reposition the weighing platform. The machine resets and you are returned to the Home screen.

Change the Ink Cartridge

To change the ink cartridge:

1. Remove the weighing platform (if you are using one) by lifting it straight up.
2. Open the top cover.
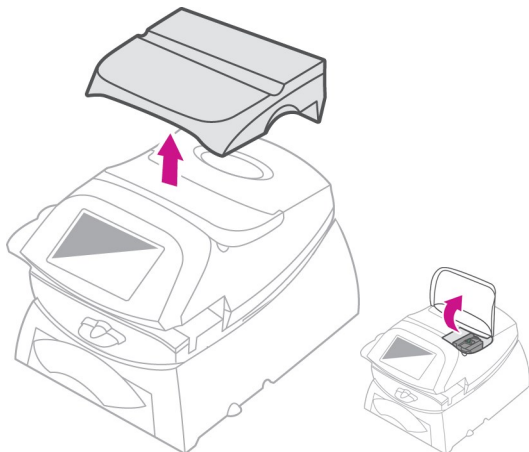
3. From the Home screen select **Mail**.
4. Select **Options** from the list on the left.
5. Select **Maintenance Mode**.
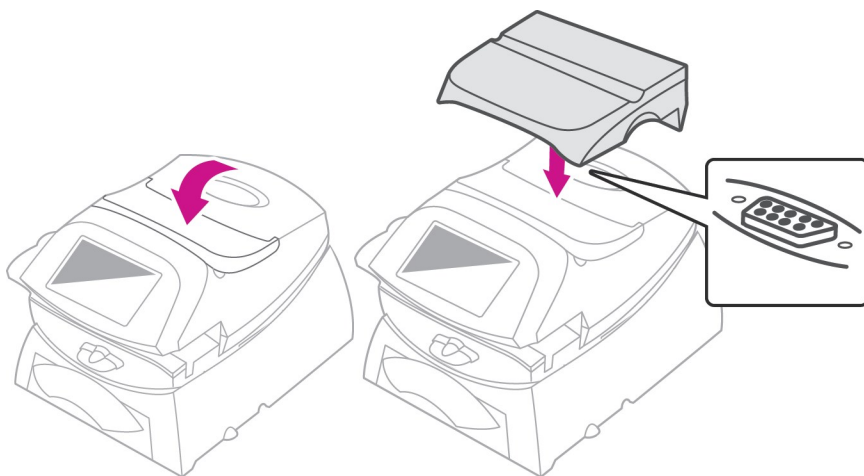6. Select **Printer Maintenance**.
7. Select **Replacement**.
8. Select **Replace Ink Tank**. This moves the print head and ink tank cartridge into position.
9. Slide the green lever to the right and unlatch the ink tank cartridge guard; flip the guard open.
10. Lift up and remove the ink tank cartridge.

11. Open new Ink tank packaging and remove tape on the bottom of the cartridge.
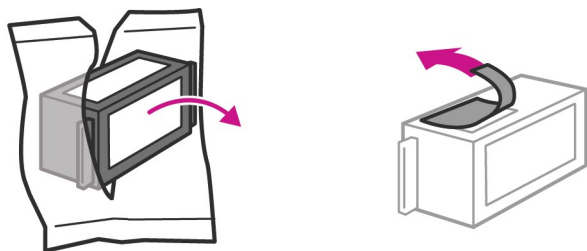
12. Lower the ink cartridge into the cavity (the label on the top of the cartridge should face the front of your system). The ridges on either side of the cartridge will slide into the grooves.

13. Close the ink cartridge guard and "click" to secure.
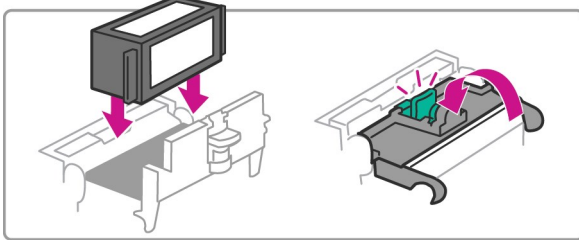
14. Close the top cover and reposition the weighing platform. The machine resets and you are returned to the Home screen.
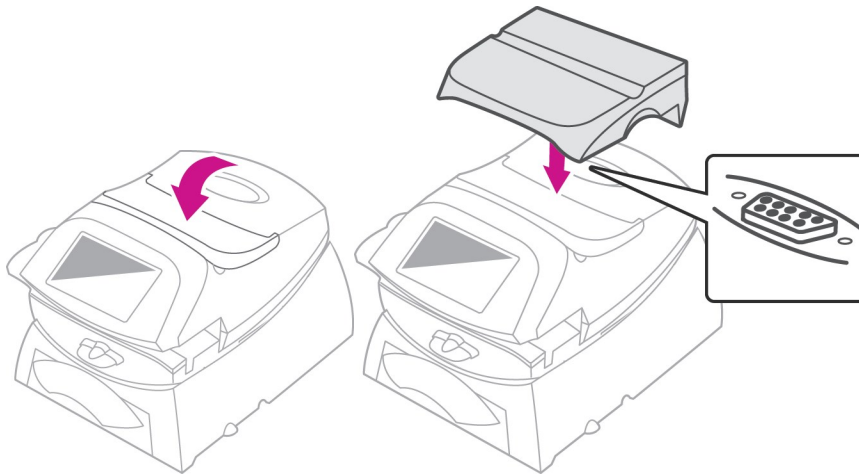
Fill the Moistener Tank
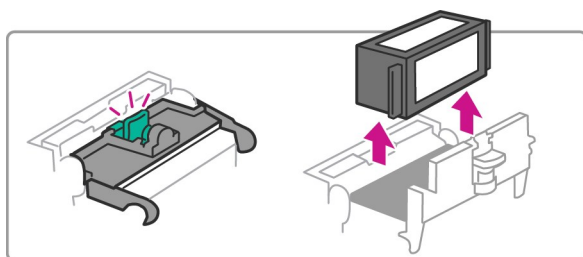
Refer to the following procedure to refill the moistener.

1. Check the moistener tank to see how much sealing solution is left.

2. Add enough E-Z Seal® to bring the sealant level up to the bottom of the fill hole. We recommend E-Z Seal because it helps keep your moistener clean and improves sealing efficiency. Refer to: *Contact Pitney Bowes* to order E-Z Seal.

3. Allow 30 minutes for the moistener brush and wick to get completely wet for optimal performance.

Note:

Do not overfill the moistener tank.

Clean the Moistener Brush

1. Push down on the blue release lever on the moistener.
2. Pull the moistener to the left, away from the machine.
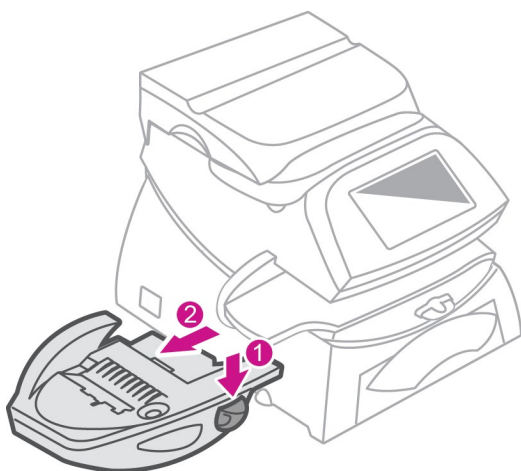
3. Open the hinged brush holder. Grasp the bristles and slide the brush out of the hinged brush holder, toward the front of the moistener tank.

4. Rinse the brush thoroughly in plain water. Blot the brush with a paper towel to dry.
5. Position the brush so its bottom edge is under the mounting tabs and reinstall into the moistener.

6. Reinstall the moistener. Push down on the blue release lever on the moistener and guide the moistener back onto the machine. You should hear a "click" as it engages.

Clean the Moistener Wick

1. Push down on the blue release lever on the moistener.
2. Pull the moistener to the left away from the machine.
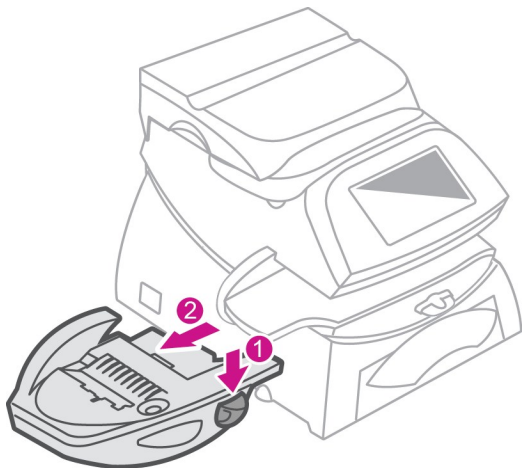
3. Lift the wick holder door and pull up to remove the holder and wick from the moistener.
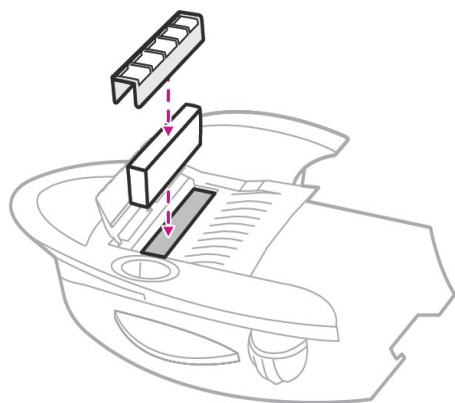
4. Separate the wick from the metal holder, rinse the wick thoroughly in plain water. Blot the wick with a paper towel to dry and place the wick back into the holder.
5. Reinstall the wick and holder into the moistener. Be sure the holder is seated against the top of the wick.
6. Reinstall the moistener. Push down on the blue release lever on the moistener and guide the moistener back onto the machine. You should hear a "click" as it engages.

14 - SendPro™ 300 (for Shipping)

In this section

Getting Started

About SendPro™ 300 for Shipping

This section covers information and procedures for using the SendPro 300 application for shipping. SendPro 300 has a shipping application that simplifies each phase of shipping for USPS, FedEx or UPS. You can weigh packages, print shipping labels and schedule pickups. Track every item online, send updates in real-time and more.

Add USPS Postage to Your Account

Your USPS postage balance is displayed in the upper right area of the Recipient screen, just below the main navigation bar.

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

To add postage to your account:

1. From the Home screen select **Shipping Label**.
2. Tap the **USPS** icon.
3. *Print a USPS label*.
4. When all shipping options have been selected you will see either a **Print** button (if you have enough postage in your USPS account) or an **Add** button (if there is not enough postage in your USPS account) in the lower right corner of the screen.

There are two ways to add postage.

If the (green) Print button is displayed:

1. Tap the blue **. . .** (more) button to the right of the **Print** button.
2. Tap **Refill Postage**. The Add Postage screen displays.
3. Tap the amount of postage you want to purchase for this refill. You can refill using a preset amount of $20, 50 or $100 or select **Custom** 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.
4. If you have Cost Accounts enabled, you must assign the postage refill to an account.
5. Tap **Add Postage**.

If the (red) Add button is displayed:

1. Tap the **Add** button.
2. Tap **Refill Postage**. The Add Postage screen displays.
3. Tap the amount of postage you want to purchase for this refill. You can refill using a preset amount of $20, 50 or $100 or select **Custom** 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.
4. If you have Cost Accounts enabled, you must assign the postage refill to an account.

5. Tap **Add Postage**.
   - If you get a message "we couldn't process your payment" and you are 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.

If you need further assistance, please use the **Contact Us** options below.

Set up a FedEx Account

1. From the Home screen select **Shipping Label**.
2. Select the FedEx Carrier icon; the Add FedEx Account screen opens.
   - *If you do not have a FedEx account*, select **Create New FedEx Account**. This provides you with a link to the FedEx website where you can sign up and get a FedEx account number.
   - *If you already have a FedEx account*, select **Enter My FedEx Account** .
3. Enter your 9-digit FedEx account number.
4. 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™ 300. You need to replace this with your FedEx name and address.

   - To use a contact name and address different from your FedEx billing address, select the **My contact name or address...** check box . A blank name and address form is provided for you to enter this information.
5. To continue, select the **Accept the FedEx End-User License Agreement** check box.
6. Select **Add Carrier**. You will know your FedEx account has been added to SendPro 300 (for shipping) when you see the message, "Settings have been saved successfully."

Set up a UPS Account

1. From the Home screen select **Shipping Label**.
2. Select the UPS carrier icon. The Add UPS Account screen opens.
   - *If you do not have a UPS account*, select **Create New UPS Account**. 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 **Enter My UPS Account** .
3. Enter your 6-digit UPS account number.

4. Select **Account Type** and select the appropriate type from the drop-down menu.

5. 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 have shipped with UPS in the past 90 days, UPS issued you an invoice and that is the information required here. You or the account holder in your organization should be able to download it from *UPS.com*.

   - If you do not have a recent invoice, select the **I don't have a recent invoice** check box.

6. Enter your name and address exactly as they appear on your UPS account.

> Important:
>
> For security reasons, the information you enter when adding UPS as a carrier account for your SendPro™ 300 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 the SendPro 300.

7. To continue, select the **I accept the UPS Technology Agreement** check box.

8. Select **Add Carrier**. You will know your UPS account has been added to SendPro 300 (for shipping) when you see the message, "Settings have been saved successfully."

View your USPS Account Information

The method you use to pay for postage to create USPS shipping labels is set up when you purchase the SendPro™ 300 (for shipping) application.

To view the payment method for your USPS account:

1. From the Home screen select **Shipping Label**.
2. Select the USPS carrier icon.
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 display in the Add Postage dialog box.

Address Book

Add an Address to the Address Book

1. From the Home screen select **Shipping Label**.
2. Select **Address Book**.
3. Select either the **Recipient** or **Sender** tab (whichever applies).
4. Select the **+** (Add New) button.
5. Enter the details for the new address in the fields provided on the screen.
6. Select **Save** when done. You may be prompted to *verify the address*.

The new address is added to your list of addresses.

Change 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 when 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. From the Home screen select **Shipping Label**
2. Select a carrier icon.
3. Select **Sender** in the top left side of the Recipient screen and select the appropriate option.
   - **Edit sender address** - select this option to display all the address fields
     a. Type your changes in the appropriate field(s).
     b. If you make changes to street, city, state or ZIP code (USPS) select the **Save** when done.
   - **Add new sender address** - select this option to add a new sender address
     a. Type in the sender's address in the fields provided.
     b. For USPS, select **Confirm Address** when you are done.
   - **View all senders** - select this option to display all the available sender addresses in the address book
     a. Select the address you want to use. This address then appears in the Sender section.

Edit an Address

1. From the Home screen select **Shipping Label**.
2. Select the **Address Book**.
3. Select **Recipients** to display the list of all recipient addresses or **Senders** to display the list of all sender addresses.
4. Select the address you want to edit from the list.
5. Select the **Edit** icon on the right side of the screen.
6. When the address fields display in the Edit Contact screen, make any changes necessary.

The updated address displays in the list of addresses.

Delete an Address

1. From the Home screen select **Shipping Label**.
2. Select **Address Book**.
3. Select **Recipients** to display the list of all recipient addresses or **Senders** to display the list of all sender addresses.
4. Select the address from the list.
5. Select the **Delete** icon on the right side of the screen.
6. To confirm that you want to delete the address select **Delete** .

The address is deleted from your list.

Verify a USPS Recipient Address

When you enter an address you may be prompted to verify the address when you click the down arrow to move to the next screen during the label creation process.

If you are prompted to verify the address you can select one of two ways:

Manually Edit the Address

1. Select **Edit** to correct the address manually.
2. You go back to the Recipient screen to re-enter the address.
3. Select the down arrow to continue to the next screen.

USPS Verified Address

You can auto correct the address using the USPS verified database.

1. Select **Use Verified** and the system will auto correct the address based on the USPS database of valid mailing addresses.

> Note:
>
> - If the USPS database doesn't recognize a recipient's address, you will need to edit the address until it can be validated. Then you can print your label.
> - If SendPro 300 finds a close match in the USPS database, you will have the options of using that address instead of the one you entered, editing your entry or using the address you entered as is.

You are automatically moved to the next screen to continue the process.

Creating a Shipping Label

Weigh Your Shipment with the SendPro™ 300 Scale

When you create a shipping label you select the type of envelope or package for your shipment as part of the label creation process.

Depending on the carrier and whether you are using carrier-specific packages (flat-rate envelopes or boxes) or your own packages, you may be prompted to enter the weight of your shipment.

1. Place the package on the weighing platform and select the scale icon. The weight appears in the **Weight** field.
2. Select the down arrow to continue to the next step, selecting services.

Add a Shipment Memo

Once you enter all the information required to create your shipping label (recipient address, packaging information, carrier services) you can enter a note that will appear in the History file for that shipping label.

1. *Create a shipping label*.
2. When you select **Print** during this process, the Label Options screen appears if you have the **Always show these options before printing** setting turned on (this is the factory default setting).

> Note:
>
> You will not get the Label Options screen when you select **Print** if **Always show these options before printing** is not turned on. If this is the case, you can select the blue **...** (more) link in the bottom right-hand corner of the screen (next to the **Print** button), and select **Label Options**.

3. On the Label Options screen there is a **Memo** field where you can enter a note (50 character limit). This note will appear in the History file for the shipping label.

Use Your Own Packaging for Shipments

For any carrier you can choose to use your own envelope or box, in which case you will be prompted to select the package type (box, envelope, or irregular packaging) and enter the dimensions and weight.

Select the Package Type

1. On the Package Type screen select **My Box or Envelope**.
2. Select your package details (type of package).

Enter the Package Dimensions

1. Measure your package.
2. Tap in the dimensions field(s) and enter the required dimensions

Enter the Package Weight

1. Place the package on the weighing platform.
2. Select the scale icon and the weight appears in the **Weight** field.
3. Select the down arrow to continue to the Service screen.

Carrier Contact Information

For detailed information on size and weight restrictions contact your carrier:

- USPS: 1-800-275-8777
- UPS: 1-800-742-5877
- UPS International: 1-800-782-7892
- FedEx: 1-800-463-3339

Create a Shipping Label

You can create a USPS, UPS or FedEx shipping label by either starting from the **Shipping Label** button on the Home screen or from within the Address Book (refer to *How to create a USPS shipping label from an address*).

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.

Create a Shipping Label from the Home Screen

These steps start at the Home screen and bring you to the Recipient screen to begin. As you create the label your progress displays along the bottom of the screen.

1. From the Home screen select **Shipping Label**.
2. Select the carrier icon; the Recipient screen opens.
3. If you need to change the sender's address refer to: *How to change the sender's address.*

Cost Accounts

If you are using Cost Accounts you need to assign a cost account for this label. If you are not using Cost Accounts, move to Step 1 - Enter the Recipient Address.

Step 1 - Enter the Recipient Address

You can enter the recipient's address using one of two methods:

- Type in the recipient's address in the fields provided. The system supports "typeahead" so if the name or part of the name is already in the address book, it will display the matching address (es).

 OR

- Select the (Choose from Address Book) icon . A list of addresses displays:
  - Scroll through the list *OR*
  - Select the down arrow in front of the search field and type a full name, street, etc.

Automatically email the shipping tracking number

If you would like to automatically email the tracking number to recipients or senders (or both) when you print the shipping label:

1. Select the **Email the tracking number** check box.
2. Enter the email address in the field provided.
3. To add more than one email, select the [**Enter**] key on the keypad after each address entry.

Verify the USPS Address

If prompted, verify the USPS recipient address. Refer to: *How to verify a USPS recipient address*.

Step 2 - Select the Package Type

1. At the Package Type screen, enter the shipping package information.

   - 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, tap and hold your finger on the package button.
   - 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.*

2. If you are creating an international or military shipping label, you will be prompted to enter the required customs information in the Customs 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 is made, cost, weight and total value. The exact requirements depend on the carrier.
3. Select the down arrow on the left side of the screen to continue to the Services screen.

Step 3 - Select Services

On the Services screen you select the carrier shipping service. Depending on the package type and carrier service, you can also select a variety of additional special services.

1. Make your selections on this screen and prepare to print the shipping label.

> Note:
>
> - 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 Add Postage screen displays so that you can add more funds to your account. Refer to: *How to add postage to your account.*

Step 4 - Print the Shipping Label

1. Select **Print** at the bottom of the screen directly under **Total Cost**.

> Note:
>
> Depending on the service, you may be prompted to enter the Sender and Recipient's phone number. Enter the numbers and select **Continue** to open the Label Options screen.

2. When the Label Options screen opens select label options. Refer to: *How to print a shipping label*.

> Note:
>
> You will not get the Label Options screen when you select **Print** if **Always show these options before printing** is not turned on. If this is the case, you can select the blue **...** (more) link in the bottom right-hand corner of the screen (next to the **Print** button), and select **Label Options**.

1. Select **Print** at the bottom of the Label Options screen.

Create a Label from an Address

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

1. From the Home screen select **Shipping Label**.
2. Select **Address Book**.
3. Select either **Recipients** or **Senders**
4. Select an address from the list.
5. Select **Print Shipping Label** and *create the shipping label*.

Print a Shipping Label

Once you enter all the information required to create your current shipping label (recipient address, packaging information, carrier services), you use the Label Options screen to define your print options before printing the label.

1. *Create a shipping label*.
2. Select **Print**. The Label Options screen appears if you have the **Always show these options before printing** setting turned on (this is the factory default setting).

> Note:
>
> You will not get the Label Options screen when you select **Print** if **Always show these options before printing** is not turned on. If this is the case, you can select the blue **...** (more) link in the bottom right-hand corner of the screen (next to the **Print** button), and select **Label Options**.

3. At the Label Options screen select your print options.

> Note:
>
> **Show cost on label** is a USPS option only. Select this check box to show the cost of the label on the label. If you have select *First Class* as the service, you *cannot deselect* the Show cost on label check box. USPS requires the cost for first class envelopes always be included on the label.

    a. Select the down arrow in the **Select a print size** drop-down list and select 4 x 6 roll *or* 8.5 x 11 paper.

    b. To see the address as it will actually print on the label, select the [🔍] (magnifier) to zoom in on the label. (Select it again it to return to the Label Options screen.)

    c. To check if the label aligns correctly when you print it, select the **Print the sample** check box.

    d. To add a note about this shipment, enter the information in the **Memo** field. You can enter up to 50 characters. This note will be available in your history file for all carriers. (Refer to: *How to search for a shipment* to view the information stored in your history file.)

4. Select **Print**.

Carrier Screen

When the Carrier screen displays (as soon as your label prints) you will see:

- A confirmation of the label you just printed at the top of the screen.
- Depending on the carrier, the top of the Carrier screen provides you with links to the following options. Select the appropriate link.
  - **Reprint this (USPS) Label** - Refer to: *How to reprint a USPS shipping label*
  - **Create a Return Label (USPS only)** - Refer to: *How to create a USPS return label*
  - **Reprint this (UPS/FedEx) Label** - Refer to: *How to reprint a UPS/FedEx shipping label*
  - **Request a Refund (USPS only)** - Refer to: *How to get a USPS shipping label refund*
  - **Void Label (UPS and FedEx)** - Refer to: *How to cancel a UPS or FedEx shipping label*

Set Up Shipping Label Printing Defaults

To choose the print settings you would like to automatically apply to all new labels:

> **Note:**
>
> When you make your selections and exit to another screen the label printing defaults are saved.

1. From the Home screen **Shipping Labels**.
2. Select **Printing**.
3. On this screen select or deselect the check boxes next to the desired settings to show or hide information on shipping labels. These options include:
   - Show cost on label
   - Print a receipt with the label
   - Choose format
     - Plain Paper – 8 ½ x 11
     - Roll - 4 x 6

Create a USPS Return Label

Create a USPS return label from a shipping label you just printed:

1. Create a shipping label. At the end process you automatically go to the Carrier screen.
2. In the **Last completed label** area on the top of the screen select **Create Return Label**.
3. Follow the same steps for *creating a shipping label*. This creates a return label.

Reprint a USPS Shipping Label

> Note:
>
> You have up to 24 hours from the initial printing to reprint.

To reprint a USPS shipping label you just printed:

1. Create a shipping label. At the end of the process you automatically go to the Carrier screen.
2. In the **Last completed label** area on the top of the screen select the **Reprint This Label**.
3. Read the information in the Reprint Label dialog and if you agree, select the check box.
4. Select **Reprint**.

Reprint a UPS or FedEx Shipping Label

> Note:
>
> You have up to 24 hours from the initial printing to reprint.

To reprint a UPS or FedEx shipping label you just printed:

1. Create a shipping label. At the end of the process you automatically go to the Carrier screen.
2. In the **Last completed label** area on the top of the screen select **Reprint This Label**.
3. Read the information in the Reprint Label dialog and if you agree, select the check box.
4. Select **Reprint** .

Transactions History

Search for a Shipment

1. From the Home screen select **Shipping Label**.
2. Select **History**. The History screen opens with the **Shipments** tab selected and a list of all the shipments displays.

Shipment Screen Details

- 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.

Refine Your Search

You can also limit or refine your search:

1. On the Shipments tab select **All Shipments** and select one of the available filters from the drop-down list (for example, Insured Shipments).
2. Other search options:
   - 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 **Calendar** and choosing the appropriate option.
   - You can also search using the recipient's name, or company, or parts of the address.
3. Select the shipment to reveal complete details for a shipping label (recipient's and sender's address, mail class and special services, Cost Account, total cost, etc).

Track a Shipment

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.

View all tracking numbers:

1. From the Home screen select **Shipping Label**.
2. Select **History**. 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.

3. To view the tracking event details for that shipment, select the shipment line item to reveal the details.

Search for a tracking number:

1. From the Home screen select **Shipping Label**.
2. Select **History** and enter the tracking number in the **Search** field.

The system automatically narrows down the list of shipments based on the information you provide.

Where is Postage Being Spent

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

1. From the Home screen select **Shipping Label**.
2. Select **History**.
3. Select the **Postage** tab. 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, select the **Cost Account** column title.)
4. Select the shipment line item to reveal complete details for a particular purchase (recipient's and sender's address, mail class and special services, Cost Account, total cost, etc).

About Cost Accounts

Cost Accounts help you keep track of where you are spending your money on postage by allowing you to assign a cost category to some or all of your shipping labels or postage refills (for example, Finance Department, Customer Communication, Package Fulfillment, etc.).

- You can create an unlimited number of accounts
- An assigned account is part of the Shipping Report in your transaction history feature
- Cost Accounts for the Shipping application are separate from the Cost Accounts you set up in the Mailing application
- The Cost Accounts feature must be initially enabled by your administrator

File an Insurance Claim

If you insured your USPS shipment, or specified a Declared Value for UPS or FedEx, you can file a claim for a lost or damaged shipment using your SendPro web account.

If you have insurance on the package:

1. Sign in to the SendPro web page.
2. Select **History**.
3. Select **Insurance Shipment** from the **All Shipments** drop-down.
4. From the list select the package.
5. Select **File Insurance Claim**.
6. Follow the prompts to file a claim.

Cancel a UPS or FedEx Shipping Label

You can cancel a UPS or FedEx shipping label so the postage is not applied to your UPS or FedEx invoice.

To cancel a shipping label after printing:

1. Create a shipping label. At the end of the process you automatically go to the Carrier screen.
2. In the **Last completed label** area on the top of the screen select **Void Label**.
3. When the Void Shipping Label dialog displays, read the information and select the check box to certify that you will not be using the shipping label.
4. Select **Yes** to cancel the label.

Get a USPS Shipping Label Refund

You can request a refund up 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 see if it can detect your shipment in its mailstream before crediting your account.

> 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 UPS or FedEx shipping label*.

1. Sign in to the SendPro web page.
2. Select **History**.
3. From the list select the shipping label you would like to get a refund.
4. Follow the prompts to request a refund.

Check the Refund Status on a Shipping Label

To check the status of a shipping label refund request:

1. From the Home screen select **Shipping Label**.
2. Select **History**. This opens the History screen with the **Shipments** tab selected. A list of recent shipments that are eligible for a refund displays.
3. Select the **Refunds** tab. You'll see a list of shipments for which you have already requested a refund.
4. Find your label in the list (or search for it - refer to *How to search for a shipment in SendPro™ 300*) and check its refund status in the **Status** column.

> Note:
>
> - For USPS labels, the status starts 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.

The amount and date of your label's refund credit is shown in the rightmost columns of the **Refunds** tab.

15 - Supplies and Options

In this section

Supplies and Optional Features

Supplies

Visit our *supplies website* to order supplies for your meter.

Options

Pitney Bowes offers a number of flexible options so you can tailor your mailing system to meet your exact needs today, and expand it as your business grows tomorrow. Contact your Pitney Bowes Sales Representative for more information.

Integrated Weighing Platform (Scale)

The weighing platform allows you to accurately weigh mail and packages. It is a 10 lb capacity scale. Refer to: *Apply Postage Using the Scale* for details on using the weighing platform.

Moistener

The moistener applies sealing fluid to the envelope flap. You can seal envelopes or leave them unsealed, depending on how you feed them. Refer to: *Feed Envelopes and Tape Strips* for details on using the moistener.

Electronic USPS Confirmation Services

This option is only available for use on the Mailing application of your SendPro 300 meter. It allows you to get discounted fees from USPS® for selected services. Reference the DM Series Confirmation Services Guide on the support page of our website for more information on this feature. Refer to: *Contact Pitney Bowes* for web addresses.

Postal Inscriptions/Advertisements

This option is only available for use on the Mailing application of your SendPro 300 meter. Your system comes pre-loaded with several envelope ads and postal inscriptions. These give your mail a professional appearance and can turn your mailings into a powerful promotional tool. Pitney Bowes can provide additional envelope adds and inscriptions if your needs require it, up to a total of twenty ads and twenty inscriptions.

Optional inscriptions and ads are convenient to add because they are done as system downloads via the Pitney Bowes Data Center.

16 - Specifications

In this section

Specifications (Equipment and Materials)

## Equipment Specifications

	Specification
Dimensions	• Base Model 9.7" (246 mm) H x 13.6" (345 mm) W x 15.8" (401 mm) D • With Weighing Platform 10.1" (257 mm) H x 13.6" (345 mm) W x 15.8" (401 mm) D • With Weighing Platform and Moistener 10.1" (257 mm) H x 18.5" (470 mm) W x 15.8" (401 mm) D
Weight	15 lbs. (6.8 kg)
Power Requirements	100-240 VAC, 50/60Hz. 1.0A
Ports	2 USB Host, 1 USB Slave, 1 RJ-11
Operating Temperature	40°F (4°C) to 108°F (42°C)
Sound Level	Machine noise is less than 70dba in accordance with EN ISO 7779, and ANSI 12.10.
Throughput	Up to 45 letters per minute Actual throughput will vary, depending on the material used, machine condition, use of moistener, etc.
Print Resolution	600 x 400 dpi
Print Image Area	At least 1" (25.4 mm) x 6-5/8" (170 mm)
Ink Cartridge Life	Up to 3,000 impressions without an envelope ad. Actual ink yields vary with usage, graphics printed and environmental conditions.
Tape Strip	Self-adhesive, dual tape strip for use on mail pieces that are too thick/large to run in machine.
Envelope Ads	Up to 20 (internally held)
Postal Inscriptions	Up to 20 (internally held)
Maximum Imprint	$99.999

Material Specifications

Material	Specification
Minimum Size	5" x 3" (127 mm x 76 mm)
Maximum Size	15" x 13" (381 x 330 mm)
Minimum Flap Depth	7/8" (22 mm)
Maximum Flap Depth	3" (76 mm)
Minimum Thickness	0.007" (0.18 mm)
Maximum Thickness	3/8" (9.5 mm)
Maximum Stack Height for Mail	2.5" (60 mm)
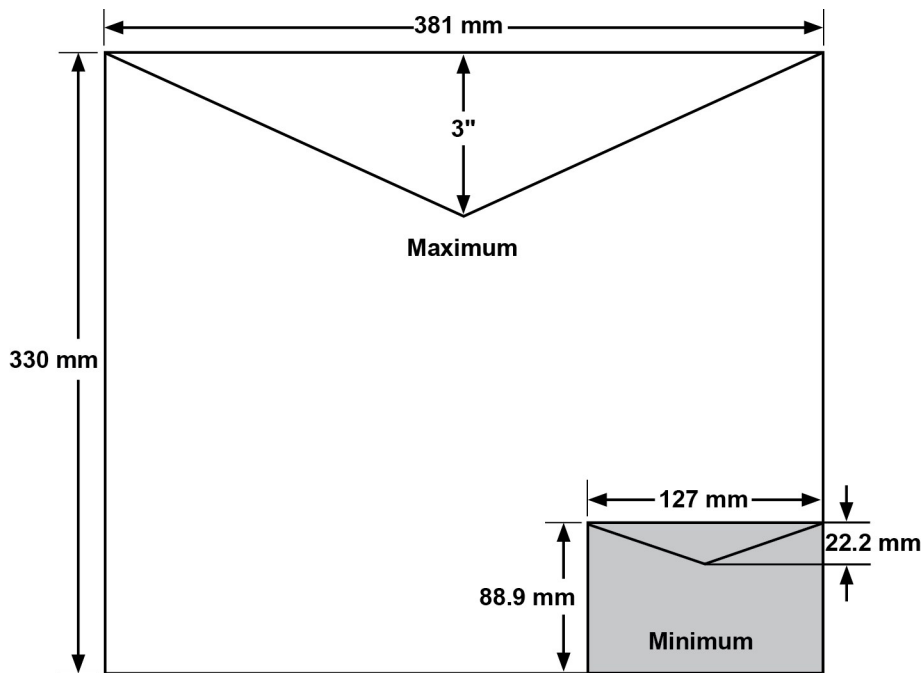
Note:

For best results, always make sure your material conforms to these specifications.

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www.pitneybowes.com

For Service or Supplies