

How to Create a Technical Support Case

Upon Sign-in, one of the following screens will be displayed based on the number of products you have.

1 You will see one of the two screens below. Select **“Create a Support Case”**




The image displays two screenshots of the Pitney Bowes user interface. The left screenshot shows the 'My Account' dashboard for a user named John. It features several sections: 'BILLS & INVOICES', 'PROFILE MANAGEMENT', 'POSTAGE MANAGEMENT', 'SERVICE & SUPPORT', 'PURCHASE POWER', and 'ONLINE ORDERING'. The 'SERVICE & SUPPORT' section has a 'Create a Support Case' button highlighted with a red box and a blue '1' callout. The right screenshot shows the 'My Account' dashboard for a user named Paige. It features a 'MY PRODUCTS' section with a 'DM100' product selected, and a 'MY SUPPORT CASES' section with a 'Create a Support Case' button highlighted with a red box and a blue '1' callout. Both screenshots include a 'Please note' banner at the top regarding a systems upgrade.

2 Make sure the correct account is selected.

3 If the account number is incorrect, click 'change account' and select the appropriate account from the 'Select and Account' dialog box.

The image shows a sequence of three screenshots illustrating the account selection process. The first screenshot shows the user's account information: Account PB DEMO (#0015558720) and Address 37 EXECUTIVE DRIVE, DANBURY, CT / United States, 06810-4147. A 'change account' link is visible. The second screenshot shows a 'Select an Account' dialog box with a list of accounts. A red arrow points from the 'change account' link in the first screenshot to the dialog box. The third screenshot shows a 'Refer to any Pitney Bowes statement or invoice and enter the account number to start.' dialog box with a text input field for the account number.

4 Select the 'Technical Support' button below:

pitney bowes   




Account PB DEMO (#0015558720) | [change account](#) Welcome John Smith (demo@mailinator.com) | [sign out](#)
Address 37 EXECUTIVE DRIVE, DANBURY, CT/ United States, 06810-4147

Knowledge **Cases**

Which of the following best describes your inquiry ?

4 **Client Service** : Select this if it's about your account (e.g. billing change of address etc.)
 Technical Support : Select this if it's about a technical problem with your equipment or software

Next

pitney bowes   

Account PB DEMO (#0015558720) | [change account](#) Welcome John Smith (demo@mailinator.com) | [sign out](#)
Address 37 EXECUTIVE DRIVE, DANBURY, CT/ United States, 06810-4147

Knowledge **Cases**

5 Select the product that requires support

Product	PCN	Serial #	Location
<input type="radio"/> 1A03:Specimen Intellilink Postal Security Dvc	1A03	0008425	37 EXECUTIVE DRIVE, DANBURY, CT, United States, 06810-4147
<input type="radio"/> 1E02:1E02 Scan Bus Mngr/Budget Mngr	1E02	0009044	37 EXECUTIVE DRIVE, DANBURY, CT, United States, 06810-4147
<input type="radio"/> 1FR0:USPS Domestic Rates Connect +	1FR0	108646448	37 EXECUTIVE DRIVE, DANBURY, CT, United States, 06810-4147
<input checked="" type="radio"/> K700:Mailstation Meter	K700	4500102	37 EXECUTIVE DRIVE, DANBURY, CT, United States, 06810-4147
<input type="radio"/> APFB:Color Graphics Printing	APFB	109528206	37 EXECUTIVE DRIVE, DANBURY, CT, United States, 06810-4147

Next [Back](#) [My Product Does Not Exist](#)

6

In the 'Description Information' section, provide more information about your Technical Services case from the pull-down menu provided.

- Select the appropriate option under 'How can we help?'
- Additional information will be required in the 'This relates to' field.

The screenshot shows the 'New Case' form in the Pitney Bowes system. The 'Description Information' section is highlighted with a red box and callout 6. The 'Submit' button is highlighted with a red box and callout 7. Two dropdown menus are shown on the right, one for 'How can we help?' and one for 'This relates to...'.

How can we help ? | I need help with my software

This relates to... | --None--

Subject | --None--

Initial Details

- Reporting a crash or error message
- Missing or incorrect data in my product
- Performance issues
- My hosted/OnDemand service
- Administrative help with my hosted/OnDemand service
- An Install issue

Additional Information

Operating System | --None--

Database | --None--

Current Version |

Purchase Order # |

Submit | Save & Close | Submit & Add Attachment | Save & New | Check Spelling | Cancel

7

Select "Submit". Your Case has been now been created and an email will be sent to confirm your case details.

8

You can check on the status of your case – once it is resolved, the status will change from 'open' to 'closed'.

The screenshot shows the 'Case 04553061' page in the Pitney Bowes system. The 'Status' field is highlighted with a red box and callout 8. The page shows the case details, including the account name, contact name, installed product, and case number.

Case 04553061 | Printable View

✓ Case has been submitted.

« Back to List

[Case Comments](#) | [Articles](#) | [Attachments](#)

Case Detail | Edit | Close Case

Case Information

Account Name | PB DEMO | Priority | Medium

Contact Name | John Smith | Status | Open

Installed Product | 4500102 | Case Number | 04553061

Description Information

How can we help ? | I need help with my equipment

This relates to... | Requesting an equipment repair

Subject | Test - PLEASE DELETE

Initial Details | Test - PLEASE

Additional Information

Operating System | | Purchase Order # | From Community please replace

Database |

Current Version |

System Information

Your Case has been created and an email will be sent to confirm your case details. See sample below:



Hello John

You've successfully created a case with our Technical Support team. Rest assured, we're looking into it and will continue to keep you updated. To help you track the progress of your case, we've created the following reference information:

Case Number: 0123456789
Subject: Non Serialized Bill

Once you're confident we've resolved the issue, we'll send a final confirmation email.

Questions? You can reach us by replying to this email (make sure you keep this code in the response [\[ref:_11D80KkyB._59989pc4H8:ref\]](#) or by updating your case using the PB My Account.

Through My Account you could also access the knowledge base, view your PB Account or see all the other ways to contact us.

We appreciate your patience and will be in touch soon.

Your PB Technical Support Team

SupportEmail@pb.com

NOTE: If a Service Technician is needed to support your case, the following calendar will be displayed for you to schedule your Service Technician visit at a convenient time for you.

The screenshot displays a web-based calendar interface for scheduling a service technician visit. At the top, it shows 'Work Order: WO-04032866' and navigation options like 'Back To Work Order' and 'Calendar Settings'. Below this, there are input fields for 'Start Date' (04/06/2016) and 'End Date' (04/13/2016), along with a 'Search' button. The main calendar view shows a grid of dates from 6 Apr 2016 to 15 Apr 2016. A 'Book Appointment' dialog box is open, showing a time slot of 12:13 PM - 5:00 PM on Wednesday, 4/6/2016. The dialog includes a checkbox for 'Ok to arrive early' and 'Book' and 'Cancel' buttons.

If you select "Ok to arrive early" and an appointment becomes available earlier than the scheduled date and time, a Service Technician will call you to see if an earlier appointment is convenient.

Knowledge Cases

Create New...

Work Order
WO-04032866

Printable View

Recent Items

- WO-04032866
- a1zM00000010QDY
- a1zM00000010QDT
- 04689929
- a1zM0000001qqFb
- a1zM0000001qqFa
- 04689359
- 04689358
- WO-04024367
- a1zM0000001qEqX

Work Order Detail

Appointment Details

Case	04689929	Scheduled Date	
Location	CAPELLA UNIVERSITY	Scheduled Date Time	
Send Thank You Email	<input type="checkbox"/>		
Manual SBR			
Found Queue	Unassigned Default		
Routing Engine Executed	<input checked="" type="checkbox"/>		
Legacy Record Number			
zip.striped	55402		
First 30 Chars of Account Name	CAPELLA UNIVERSITY		

ServiceFlow Wizard

An email will be sent to confirm your appointment.