

**DIGITAL MAILING
SOLUTION'S
GUIDE TO

PITNEY BOWES
YOURACCOUNT
AND INVIEW POSTAGE
REPORTING**

What is INVIEW™?

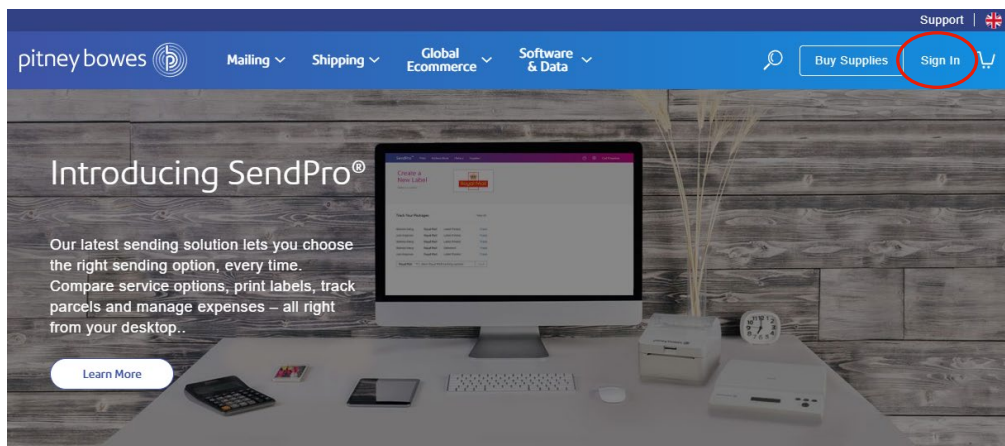
INVIEW™ is a meter reporting tool that will enable you to access postage expenditure data. It comes as standard on most Smart Meters from Pitney Bowes.

The data is collected at least once a month by a data upload, prompted by your meter. This data is stored for 25 months.

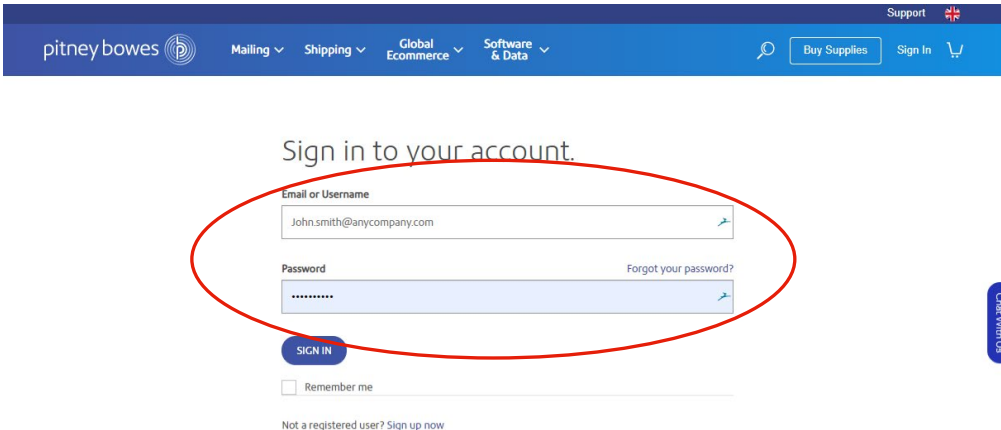
The following document shows you how to access INVIEW™ and how to get the information you require.

How to access INVIEW™?

1. Visit www.pitneybowes.co.uk
 - a. Click on **Sign In**

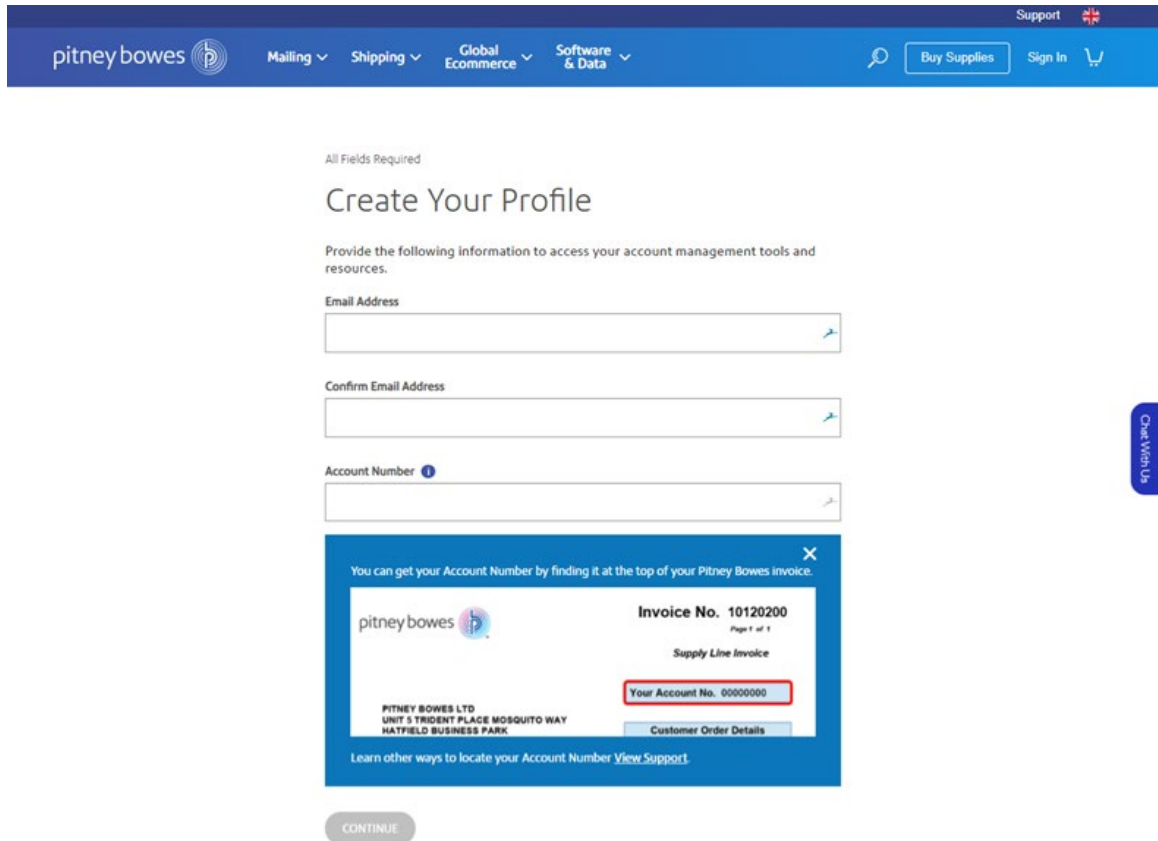


- b. Enter your email address and password



The screenshot shows the Pitney Bowes sign-in page. The top navigation bar is blue and contains the Pitney Bowes logo, menu items for Mailing, Shipping, Global Ecommerce, and Software & Data, a search icon, and buttons for Buy Supplies, Sign In, and a shopping cart icon. The main content area is white and features the heading 'Sign in to your account.' Below the heading are two input fields: 'Email or Username' and 'Password'. The 'Email or Username' field contains the text 'John.smith@anycompany.com'. The 'Password' field contains a series of dots. A 'Forgot your password?' link is located to the right of the password field. Below the input fields is a blue 'SIGN IN' button. Below the button is a checkbox labeled 'Remember me'. At the bottom of the form, there is a link that says 'Not a registered user? Sign up now'. A vertical 'Chat With Us' button is located on the right side of the page.

- i. If you have not registered for YourAccount click **Sign up now** and follow the steps



All Fields Required

Create Your Profile

Provide the following information to access your account management tools and resources.

Email Address

Confirm Email Address

Account Number

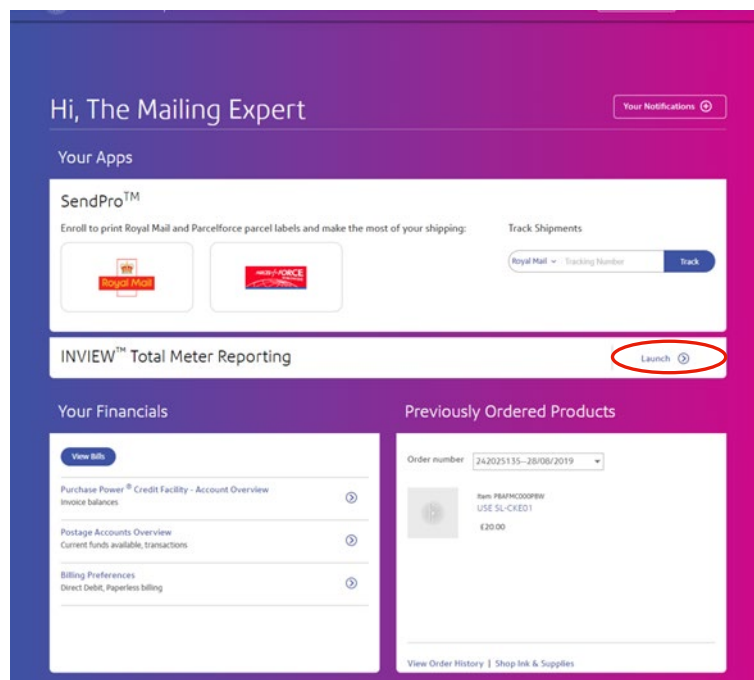
You can get your Account Number by finding it at the top of your Pitney Bowes invoice.

pitney bowes Invoice No. 10120200
Page 1 of 1
Supply Line Invoice
Your Account No. 00000000
PITNEY BOWES LTD
UNIT 5 TRIDENT PLACE MOSQUITO WAY
MATFIELD BUSINESS PARK
Customer Order Details

Learn other ways to locate your Account Number [View Support](#)

CONTINUE

- c. Click on **INVIEW-Total Meter Reporting 'Launch >'**



Hi, The Mailing Expert Your Notifications

Your Apps

SendPro™
Enroll to print Royal Mail and Parcelforce parcel labels and make the most of your shipping: Track Shipments

Royal Mail Parcel Force

INVIEW™ Total Meter Reporting Launch >

Your Financials View Bills

Purchase Power® Credit Facility - Account Overview Invoice balances

Postage Accounts Overview Current funds available, transactions

Billing Preferences Direct Debit, Paperless billing

Previously Ordered Products

Order number 242025135--28/06/2019

Item PBANK000PBY USE SL-CKED1 £20.00

View Order History | Shop Ink & Supplies

INVIEW™ Overview



On opening INVIEW™ you are presented with 4 report options

1. Postage Reports

- Postage Reports provide calendar month summary of Royal Mail postage services used.
- This is available for all Smart Meters.
- It is updated monthly following the Data Capture upload.

2. Meter Reports

- Meter Reports are reports of volumes and postage by meter.
- This is available to all meters linked to Postage By Phone/Purchase Power.
- This is updated on connects to Postage By Phone.

3. Account Reports

- Account Reports are reports of activity by Accounts or Departments.
- Activity can be analysed down to daily level.
- Account Reports are available on the following meters:
 - Connect+/SendPro
 - DM400-DM1000 (1D20 Meters) with Budget Manager or Meternet
 - DM300C/M-DM475C/M as standard installed since Oct 12
 - DM300C/M-DM475C/M placed installed Budget Manager prior to Oct 12
 - DM110i, DM160i, Dm220i, DM60
- It is not available on:
 - DM50/55
 - DM100 Series
 - DM160
 - DM300C-DM475C without Budget Manager installed prior to Oct 12
 - DM400-DM1000 (1D20 Meters) with Budget Manager or Meternet
- This can be updated immediately by completing a data upload on the meter or when Data Capture uploads are completed.

4. My Reports

- This is all saved bespoke reports.

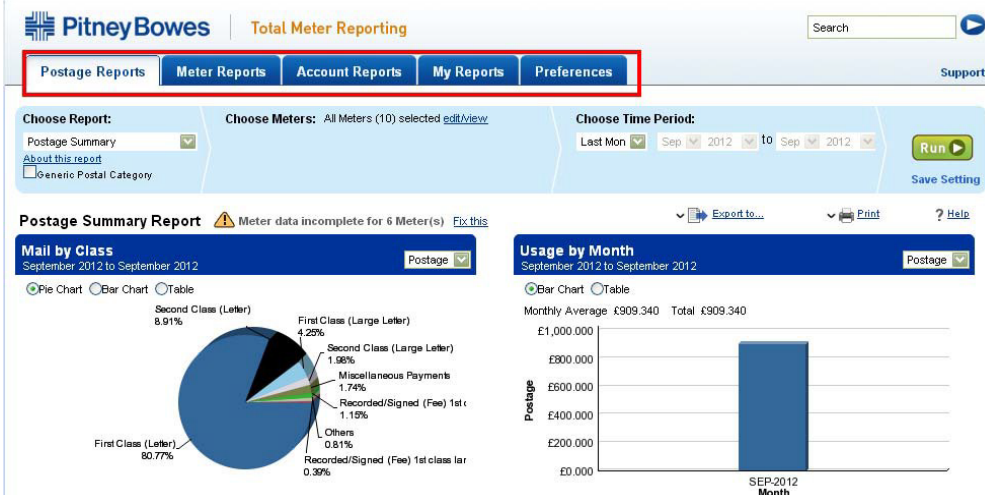
Click on any of these to progress.

Report Building Screens

The report building screens are the same for the Postage, Meter and Account Reports. Some of the field options may vary, i.e., on Postage Reports the date fields are in months only whereas Account Reports can be select by individual days.

Tabs

The tabs are how you would move between the various reporting options or access Preferences.




The screenshot shows the Pitney Bowes Total Meter Reporting interface. At the top, there are navigation tabs: Postage Reports, Meter Reports, Account Reports, My Reports, and Preferences. The 'Postage Reports' tab is highlighted with a red box. Below the tabs, there are sections for 'Choose Report:', 'Choose Meters:', and 'Choose Time Period:'. The 'Postage Summary Report' is selected. Below this, there are two main sections: 'Mail by Class' and 'Usage by Month'. The 'Mail by Class' section shows a pie chart with the following data:

Class	Percentage
First Class (Letter)	80.77%
Second Class (Letter)	8.91%
First Class (Large Letter)	4.25%
Second Class (Large Letter)	1.98%
Miscellaneous Payments	1.74%
Recorded/Signed (Fee) 1st class lar	1.15%
Others	0.81%
Recorded/Signed (Fee) 1st class lar	0.30%

The 'Usage by Month' section shows a bar chart for September 2012. The Y-axis represents Postage in £, ranging from £0.000 to £1,000,000. The X-axis shows 'SEP-2012 Month'. The bar indicates a total of £909,340 for the month.

Options Ribbon

This is where you will set the rules and parameters for your report and have the ability save reports.



The screenshot shows the same Pitney Bowes Total Meter Reporting interface as above. The 'Options Ribbon' area, which includes the 'Choose Report:', 'Choose Meters:', and 'Choose Time Period:' sections, is highlighted with a red box. This area allows users to select the report type, choose meters, and set the time period for the report. The 'Run' button is also visible in this section.

In this area you can select the following options:

- Reports
- Meters
 - By Groups
 - By Location
 - Individual
- Period

Within this section is the **Save Setting** option appears. Any report saved here will then be available in **My Reports** tab.

Report Output

This is the output of your report criteria.

Postage Reports
Support

Choose Report: Postage Summary Generic Postal Category

Choose Meters: All Meters (10) selected [edit/view](#)

Choose Time Period: Last Mon Sep 2012 to Sep 2012 Run

[Save Setting](#)

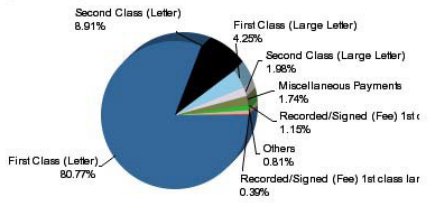
Postage Summary Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#) [Export to...](#) [Print](#) [Help](#)

Mail by Class

September 2012 to September 2012

Postage

Pie Chart Bar Chart Table



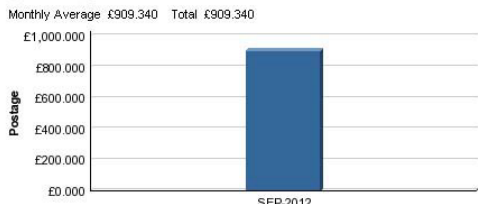
Usage by Month

September 2012 to September 2012

Postage

Bar Chart Table


Monthly Average £909,340 Total £909,340



[View Postage Report Criteria](#)

The report output can be in either:

- Postage = Total expenditure
- Pieces = No of items


Total Meter Reporting

Search

Postage Reports
Support

Choose Report: Postage Summary Generic Postal Category

Choose Meters: All Meters (10) selected [edit/view](#)

Choose Time Period: Last Mon Sep 2012 to Sep 2012 Run

[Save Setting](#)

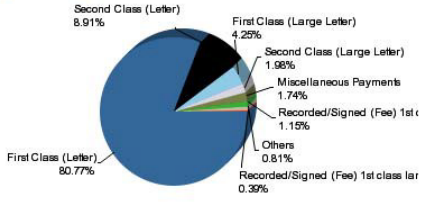
Postage Summary Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#) [Export to...](#) [Print](#) [Help](#)

Mail by Class

September 2012 to September 2012

Postage

Pie Chart Bar Chart Table



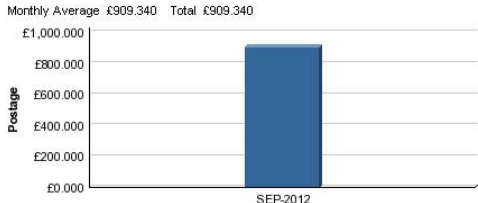
Usage by Month

September 2012 to September 2012

Postage

Bar Chart Table

Monthly Average £909,340 Total £909,340

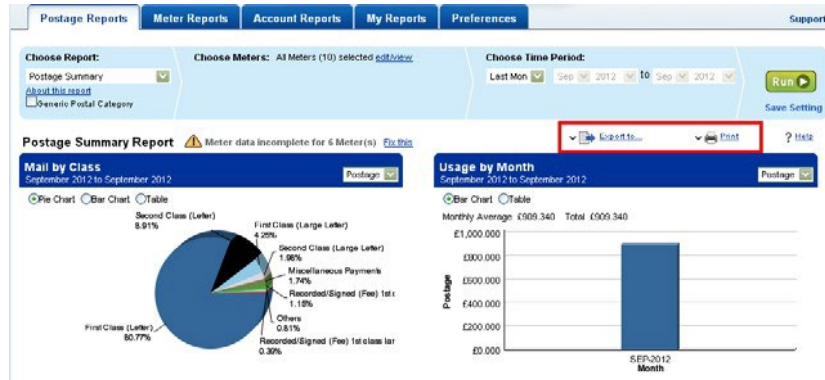


Save and Print

You have the ability to either save or print your reports. This will allow you to circulate the information as required.

You can save in the following formats:

- CSV
- Excel
- PDF

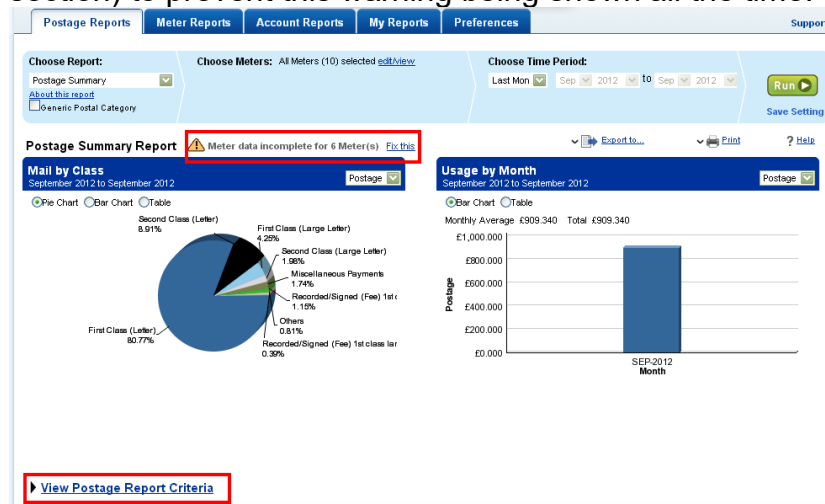


Warnings

On occasions there will be a warning. This is represented by a yellow triangle next to the report name.

This normally occurs when a meter has not upload data within the last month. It is important to remember that if you have upgraded your meter(s) within the last 25 months there will be data from your old meter(s) available for analysis – however INVIEW™ will show a warning as the old meter would not have connected since it was replaced.

You can deactivate the old meter in Preference (instructions in the Preference section) to prevent this warning being shown all the time.



If you receive a warning and do not know why you have it, you can access details of the warning by clicking on **[View Postage Report Criteria](#)**.

This will show the following data:







- Location – site of meter.
- Meter name – Meter type and serial number or name allocated in Preferences.
- Model – Meter Type.
- Serial number.
- PBP Account Number – Postage By Phone account number.
- Status – this will show if meter is active or inactive (withdrawn, upgraded).
- Last Transaction Data – Date of last data upload.
- Status Flag – this will identify which meter(s) warning relates to.

▼ **[View Postage Report Criteria](#)**

Date Range : 01 September 2012 to 30 September 2012

Meter Group : All Meters

You have 10 meters in the selected group

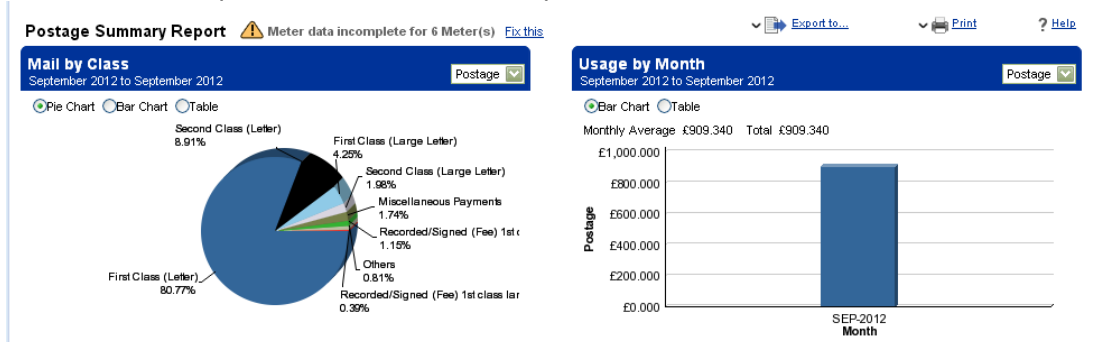
Location	Meter Name	Model	Serial Number	PbP Account Number	Status	Last transaction	Status Flag
HARLOW	1W20 - 5555216	1W20	5555216	75	Active	14 August 2012	
HARLOW	1W23 - 2233102	1W23	2233102	75	Active	03 May 2012	
HARLOW	1W23 - 2233107	1W23	2233107	75	Active	08 October 2012	
HARLOW	1W23 - 2233108	1W23	2233108	75	Active	10 September 2012	
HARLOW	1W23 - 2233111	1W23	2233111	75	Active	16 July 2012	
HARLOW	1W23 - 2233112	1W23	2233112	75	Active	18 September 2012	
HARLOW	1W23 - 2233114	1W23	2233114	75	Active	05 October 2012	
HARLOW	PR20 - 7160006	PR20	7160006	75	Active		
HARLOW	PR20-7160014	PR20	7160014	75	Active	30 September 2012	
POOLE	P720 - 6848455	P720	6848455	13536214	Active	30 September 2012	

Postage Reports

There are three Postage reports

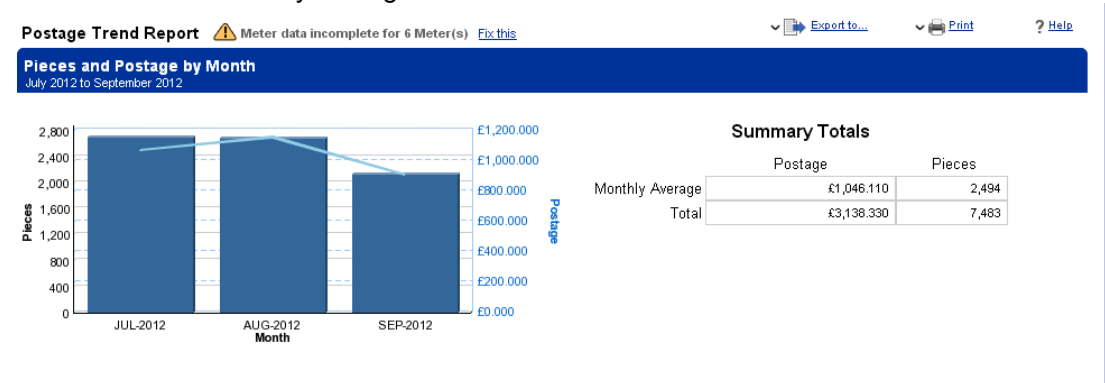
- Postage Summary

Postage Summary reports gives a simple view of the seven most used postal services and total of the expenditure or items over the period.



- Postage Trend

The Postage Trend report will provide a trend of the expenditure or items over a period of time and show monthly averages as well as totals.



- Postage Class

The Postage Class report will provide a table showing the number of items, total cost and average cost per item by Postal Class/Format. Whilst it does not actually show the weight band by Class or format you can identify the weight band by the average price.

If you view this as a detail report it will break it down by location and meter number as well.

Postage Class Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

Pieces and Cost by Class
July 2012 to September 2012

Summary Details

Class of Mail	Location	Meter Name	Pieces	Total Cost	Average Cost per Piece
Airmail Letters (Europe)	POOLE	P720 - 6848455	3	£2.370	£0.790
Business Mail 1st Class Advanced	HARLOW	1W20 - 5555216	1	£0.530	£0.530
Business Mail 1st Class Advanced	HARLOW	1W23 - 2233114	9	£3.240	£0.360
Business Mail Advanced	HARLOW	1W20 - 5555216	1	£0.370	£0.370
Business Mail Advanced	HARLOW	1W23 - 2233107	39	£9.750	£0.250
First Class (Large Letter)	HARLOW	1W23 - 2233107	39	£19.500	£0.500
First Class (Large Letter)	HARLOW	1W23 - 2233107	5	£3.600	£0.720

Meter Reports

There are four Meter Reports

- Meter Summary

This report shows by each individual meter either the items or expenditure within the defined period. It also shows the last transaction (connection) date.

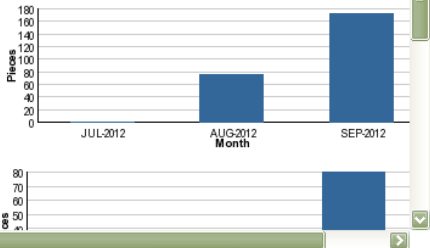
Meter Summary Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#) Export to... Print Help

Meter Summary Report
01 July 2012 to 30 September 2012 All Locations

Pieces Postage Prev | Next

HARLOW - 7 Meter(s)

Name	Serial No.	Version	Model	Reference Code	Last transaction	Closed Through
1W23 - 2233108	2233108	01.01.00	1W23		10 September 2012	



Name	Serial No.	Version	Model	Reference Code	Last transaction	Closed Through

- Daily Meter Activity

This shows the daily activity (items and expenditure) as a summary across all meters or as a detailed report showing the activity by location and meter.

Daily Meter Activity Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

Meter Activity by Day
01 September 2012 to 30 September 2012

Summary Details

Date	Refill/Refund	Pieces	Total Cost	Average Cost Per Piece
01 September 2012	£0.000	0	£0.000	£0.000
02 September 2012	£0.000	0	£0.000	£0.000
03 September 2012	£0.000	52	£20.250	£0.389
04 September 2012	£0.000	14	£9.560	£0.683
05 September 2012	£0.000	26	£17.650	£0.679

Daily Meter Activity Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

Meter Activity by Day
01 September 2012 to 30 September 2012

Summary Details

Date	Location	Meter	Refill/Refund	Pieces	Total Cost	Average Cost Per Piece
01 September 2012	HARLOW	1W23 - 2233107	£0.000	0	£0.000	£0.000
01 September 2012	HARLOW	1W23 - 2233108	£0.000	0	£0.000	£0.000
01 September 2012	HARLOW	1W23 - 2233112	£0.000	0	£0.000	£0.000
01 September 2012	HARLOW	1W23 - 2233114	£0.000	0	£0.000	£0.000
01 September 2012	POOLE	P720 - 6848455	£0.000	0	£0.000	£0.000

- Meter Balance

The Meter Balance report shows the opening balance, refill and postage used amounts and the closing balance. This is either by location (summary) or by Meter (detailed).

Meter Balance Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

Meter Balances
01 September 2012 to 30 September 2012

Summary Details

Location	Start Funds Available	Refill/Refund	Postage Used	End Funds Available
HARLOW	£2,114,260	£1,000,000	£99,970	£3,014,290
POOLE	£334,610	£500,000	£742,290	£92,320
Totals				£3,106,610

Meter Balances
01 September 2012 to 30 September 2012

Summary Details

Location	Name	Start Funds Available	Refill/Refund	Postage Used	End Funds Available
HARLOW	1W23 - 2233107	£75,790	£200,000	£8,880	£266,910
HARLOW	1W23 - 2233108	£442,590	£0.000	£61,920	£380,670
HARLOW	1W23 - 2233112	£1,021,010	£0.000	£3,450	£1,017,560
HARLOW	1W23 - 2233114	£574,870	£500,000	£25,280	£1,049,590
HARLOW	PR20-7160014	£0.000	£300,000	£0.440	£289,560
POOLE	P720 - 6848455	£334,610	£500,000	£742,290	£92,320
Totals					£3,106,610

- Reference Code

This report will sort data by reference codes, however this functionality is not currently used in UK.

Account Reports

With Account reports you can report up to 3 Account levels within the reports – account, sub account, sub-sub account. This is defined within Preferences or via the Options banner.

Dependant on the meter types used there are up to 12 reports available.

- Account Summary

The Account Summary report shows the number of items and total expenditure by Account.

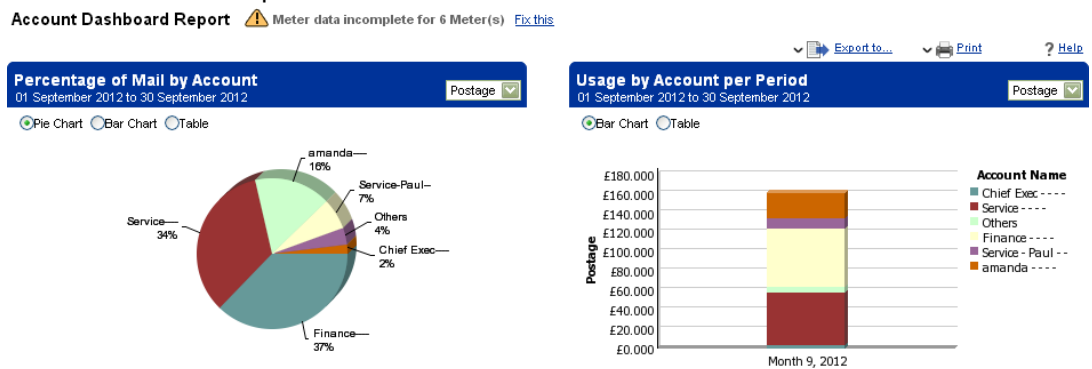
Account Summary Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

Export to... Print Help

Account	Sub Account	Sub Sub Account	Pieces	Total Charged
10 Nov	-	-	64	£1.850
		Sub Total	64	£1.850
		Total	64	£1.850
1985	june	24	23	£0.000
		Sub Total	23	£0.000
		Total	23	£0.000
1989	18	-	100	£0.000
		Sub Total	100	£0.000
		Total	100	£0.000

- Accounting Dashboard

This report provides a graphical output of the total items/expenditure across the five most common account plus the total of the others.



- Account Detail

The Account Detail reports is the same as the Account Summary but splits the expenditure in to Postage, Fee and Surcharge amounts.

Account Detail Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

Export to... Print Help

Account	Sub Account	Sub Sub Account	Pieces	Postage	Fee Amount	Surcharge	Total Charged
10 Nov	-	-	64	£1.850	£0.000	£0.000	£1.850
		Sub Total	64	£1.850	£0.000	£0.000	£1.850
		Total	64	£1.850	£0.000	£0.000	£1.850
1985	june	24	23	£0.000	£0.000	£0.000	£0.000
		Sub Total	23	£0.000	£0.000	£0.000	£0.000
		Total	23	£0.000	£0.000	£0.000	£0.000
1989	18	-	100	£0.000	£0.000	£0.000	£0.000
		Sub Total	100	£0.000	£0.000	£0.000	£0.000

- Account Detail by Postage Class

This is the same as the Account Detail but splits the items and expenditure by the Postal Class.

Account Detail by Postal Class Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

[Export to...](#) [Print](#) [? Help](#)

Account	Sub Account	Sub Sub Account	Class of Mail	Pieces	Postage	Fee Amount	Surcharge	Total Charged
10 Nov			Business Mail 1st Class Advanced	1	£0.530	£0.000	£0.000	£0.530
			First Class (Letter)	3	£1.320	£0.000	£0.000	£1.320
			No Class	60	£0.000	£0.000	£0.000	£0.000
			Sub Total	64	£1.850	£0.000	£0.000	£1.850
Total			64	£1.850	£0.000	£0.000	£1.850	
1985	june	24	No Class	23	£0.000	£0.000	£0.000	£0.000

- Account Detail by Meter

This is the same as the Account Detail report but splits the data by Location and Meter.

Account Detail by Meter Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

[Export to...](#) [Print](#) [? Help](#)

Account	Sub Account	Sub Sub Account	Location	Meter	Pieces	Postage	Fees	Surcharge Amount	Total Charged
10 Nov			HARLOW	1W20 - 5555216	64	£1.850	£0.000	£0.000	£1.850
				Sub Total	64	£1.850	£0.000	£0.000	£1.850
				Total	64	£1.850	£0.000	£0.000	£1.850
1985	june	24	HARLOW	1W23 - 2233107	23	£0.000	£0.000	£0.000	£0.000
				Sub Total	23	£0.000	£0.000	£0.000	£0.000
				Total	23	£0.000	£0.000	£0.000	£0.000

- Meter Detail by Account

This is the same as the previous report but the data is sorted by the Location and Meter initially.

Meter Detail by Account Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

[Export to...](#) [Print](#) [? Help](#)

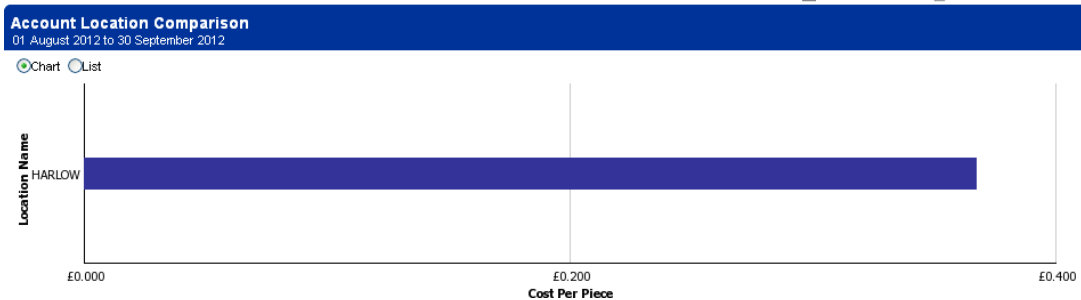
Location Name	Meter Name	Account	Sub Account	Sub Sub Account	Pieces	Postage	Fee Amount	Surcharge	Total Charged	
HARLOW	1W20 - 5555216	10 Nov			64	£1.850	£0.000	£0.000	£1.850	
					Sub Total	64	£1.850	£0.000	£0.000	£1.850
					Total	64	£1.850	£0.000	£0.000	£1.850
	1W23 - 2233107	1985	june	24	23	£0.000	£0.000	£0.000	£0.000	
					Sub Total	23	£0.000	£0.000	£0.000	£0.000
					Total	23	£0.000	£0.000	£0.000	£0.000

- Account Location Comparison

This report looks at the average cost per item by Location. This would help identify if you have sites sending higher volumes items (Special Delivery, etc) more frequently or using 1st Class instead of 2nd Class.

Account Location Comparison Report ⚠ Meter data incomplete for 6 Meter(s) [Fix this](#)

[Export to...](#) [Print](#) [? Help](#)



- Account Transaction Log

The Account Transaction Log report provides the data defined to the lowest level of all transaction processed across the meters.

By Account it will show:

- Date
- Start Time of transaction
- Finish Time of transaction
- Total time – duration for transaction
- Postal Class
- Number of items
- Postage
- Fees
- Surcharges
- Total Charged
- Mode – this is how the price was defined (dynamic scale/WoW, weight platform, etc)
- Type – This shows if it was a meter pass through (normal) or an edited transaction.

Account Transaction Log Report  Meter data incomplete for 6 Meter(s) [Fix this](#)

Export to... Print Help

Account Transaction
28 August 2012 to 30 September 2012

Account	Date	Start Time	End Time	Total Time (Days:HH:MM:SS)	Class of Mail	Total Pieces	Postage	Fees	Surcharge Amount	Total Charged	Mode	Type
10 Nov	-	-	-	-	-	-	-	-	-	-	-	-
	28 August 2012	07:57	09:04	0:01:07:10	No Class	6	£0.000	£0.000	£0.000	£0.000	AdOnly	Normal
	28 August 2012	09:05	09:12	0:00:07:06	No Class	17	£0.000	£0.000	£0.000	£0.000	AdOnly	Normal
	28 August 2012	15:25	15:25	0:00:00:30	Second Class (Letter)	4	£1.240	£0.000	£0.000	£1.240	Permit	Normal
	28 August 2012	15:26	15:26	0:00:00:02	First Class (Letter)	2	£0.880	£0.000	£0.000	£0.880	Permit	Normal

- Weight Break by Carrier

The Weight Break by Carrier report shows the mail by Postage Class and Weight Bands.

Weight Break by Carrier  Meter data incomplete for 6 Meter(s) [Fix this](#)

Export to... Print Help

Weight Break by Carrier
10 September 2012 to 30 September 2012

Carrier	Category	Class	Weight Breaks	Pieces	Average Weight	Postage with Fee
Royal Mail	Business Mail	Business Mail 1st Class Advanced	0 - 100 g	10	15.82 g	£3.770
			Class Total	10	15.82 g	£3.770
			Category Total	10	15.82 g	£3.770
	Large Letter	First Class (Large Letter)	0 - 100 g	38	0.85 g	£19.000
			100 - 250 g	2	157.75 g	£1.440
			250 - 500 g	1	267.00 g	£1.040
			Class Total	41	15.00 g	£21.480
			Category Total	41	15.00 g	£21.480
	Letter	First Class (Letter)	0 - 10 g	258	7.30 g	£93.120

- Weight Break by Account

The Weight Break by Account report shows the mail by Account, Postage Class and Weight Bands.

Weight Break by Account  Meter data incomplete for 6 Meter(s) [Fix this](#)

Export to... Print Help

Weight Break by Account
10 September 2012 to 30 September 2012

Account	Sub Account	Sub Sub Account	Carrier	Category	Class	Weight Breaks	Pieces	Average Weight	Postage with Fee
10 Nov	-	-	Royal Mail	Business Mail	Business Mail 1st Class Advanced	0 - 100 g	1	1.00 g	£0.530
			Class Total			1	1.00 g	£0.530	
			Category Total			1	1.00 g	£0.530	
			Letter	First Class (Letter)	0 - 10 g	0 - 10 g	3	1.00 g	£1.320
						Class Total	3	1.00 g	£1.320
						Category Total	3	1.00 g	£1.320
						Carrier Total	4	1.00 g	£1.850
						Sub Sub Total	4	1.00 g	£1.850

- **Weight Break by JobID**

JobID is a way of “flagging” a particular job – a campaign, etc – that can allocated across multiple accounts. The Weight Break by JobID report shows the mail by JobIDt, Postage Class and Weight Bands.

Weight Break by JobId							
10 September 2012 to 30 September 2012							
JobID	Carrier	Category	Class	Weight Breaks	Pieces	Average Weight	Postage with Fee
	Royal Mail	Business Mail	Business Mail 1st Class Advanced	0 - 100 g	10	15.82 g	£3.770
			Class Total		10	15.82	£3.770
			Category Total		10	15.82	£3.770
		Large Letter	First Class (Large Letter)	0 - 100 g	38	0.85 g	£19.000
				100 - 250 g	2	157.75 g	£1.440
				250 - 500 g	1	267.00 g	£1.040
			Class Total		41	15.00	£21.480
			Category Total		41	15.00	£21.480
		Letter	First Class (Letter)	0 - 10 g	258	7.30 g	£93.120

- **Weight Break by Trend**

The Weight Break by Trend report

General

Weight Break reports are a good way to identify if postal efficiencies are being carried out across an organisation. Within a Weight Break report you can identify mail being sent as Large Letter (0-100gms) which could be processed as standard Letters, saving 22p (based on Royal Mail franked mail prices as at 30 April 2012) per item.

My Reports

My Reports is record of all saved reports previously accessed. This allows reports to accessed and then change the period to update.

My Reports

Save your most common reports for fast access. Choose a Start Up report from your saved reports list and it will be the first one you see when you visit Inview reporting.

Click a report name to view or edit the report.

Report Name	Report Class	Report Type	Last Updated	Actions	Start Up
Steve T	Accounting	Account Summary	31/10/2011	Delete	<input checked="" type="radio"/>
Monthly Harlow	Meter	Meter Summary	05/10/2011	Delete	<input type="radio"/>
2	Accounting	Account Summary	25/03/2011	Delete	<input type="radio"/>
1	Accounting	Account Summary	25/03/2011	Delete	<input type="radio"/>
Johns October Activity	Meter	Daily Meter Activity	04/11/2010	Delete	<input type="radio"/>
Custom report 1	Postage	Postage Class	08/06/2010	Delete	<input type="radio"/>
Lee Special report	Postage	Mail By Class	17/05/2010	Delete	<input type="radio"/>
December to January Summary	Postage	Mail By Class	25/02/2010	Delete	<input type="radio"/>
Poole Report	Postage	Mail By Class	10/02/2010	Delete	<input type="radio"/>
January 2010 Meter Summary	Meter	Meter Summary	06/02/2010	Delete	<input type="radio"/>
Meter Sum Last Qtr	Meter	Meter Summary	22/01/2010	Delete	<input type="radio"/>
Post Sum Last Qtr	Postage	Mail By Class	22/01/2010	Delete	<input type="radio"/>

Make it easier to run reports that reflect your organisation when you create custom Meter Groups.

[Set up Meter Groups Now](#)

Within My Reports you can also “group” meters. This allows your business to track activity across a structure that fits with your organisation. The instruction on how to do this are covered in Preferences.

Preferences

Preferences allows you to format the information within Inview to reflect your organisation. There are four options:

- Customise Location Names

This allows you to allocate location references that may reflect location codes within your organisation or simply identify locations within the same area by specific location/department names

Select **Edit**

Customise Your Location Names

Reports are easier to read when you create custom names for your locations. Click "edit" to customise a specific location.

You have 10 meters at 2 locations. Note that meters that do not have data reporting capability are not included.

Account Number	Location on Record	No. Meters	Custom Location	Change Custom Location
30909286	THE PINNACLES, HARLOW	6	HARLOW	Edit
30909287	FAO BARRY SIMKINS, HARLOW	3	HARLOW	Edit
30933947	CONCEPT PARK, POOLE	1	POOLE	Edit

Then enter the **New Location Name**

Change Custom Location Name

Location on Record: THE PINNACLES, HARLOW

Current Location Name: HARLOW

New Location Name:

Select **OK** to save

- Customise Meter Names

This allows you to allocate meter references that may reflect cost centres within your organisation or simply identify locations within the same area by specific department names

You can filter the meters by **Location** if required

Select **Edit**

Customise Your Meter Names and Reference Codes

Reports are easier to read when you create custom names for your meters and reference codes. Click "edit" to customise a specific meter.

Show meters at following location: All Locations

Meter Serial Number	Model	Status	Reference Code	Custom Name	Change Custom Name	Exclude from Reports
1W20-555216	1W20	Active		1W20 - 555216	Edit	<input type="checkbox"/>
1W20-555401	1W20	Active		1W20 - 555401	Edit	<input checked="" type="checkbox"/>

Change the **Meter Name** and/or **Meter Code**

Update Custom Meter Name and Reference Code

Location on Record: HARLOW

Current Custom Meter Name: 1W20 - 555216

Change to following name:

Current Meter Reference code:

Change to following code:

Select **OK** to save

- Manage Meter Groups

This allows your business to track activity across a structure that fits with your organisation. Select **Add/Edit Meter Group Names**

Customise Your Meter Group Add/Edit Meter Group Names

Enter a **New Group Name**

Group	# Meters	Actions	Create New Group
TEST	1	Rename Delete	To create a new meter group, type the desired name into the box below and press Ok. <input type="text" value="Training"/> <input type="button" value="Cancel"/> <input type="button" value="OK"/>
Training Meters	2	Rename Delete	
DSC Mailroom	3	Rename Delete	

Select **OK** to Save

Select **Cancel** to go back to Meter list

Select **Assign Another Group** against meter you want to group

Customise Your Meter Group Add/Edit Meter Group Names

There is a standard "All Meters" group that includes every meter. A specific meter may be assigned to one additional group.

Location	Meter ID	Current Meter Group	Assign to Group
HARLOW	1W23 - 2233112	All Meters	Assign Another Group
HARLOW	PR20-7160014	All Meters	Assign Another Group
HARLOW	1W23 - 2233107	All Meters	Assign Another Group
HARLOW	1W23 - 2233114	All Meters	Assign Another Group
HARLOW	1W23 - 2233108	All Meters	Assign Another Group
HARLOW	1W23 - 2233102	All Meters	Assign Another Group
HARLOW	PR20 - 7160006	All Meters	Assign Another Group
HARLOW	1W20 - 5555216	All Meters	Assign Another Group

Select the **Group Name** from the drop down list

Please select a meter group Export

All Meters

All Meters

Training

TEST

Training Meters

DSC Mailroom

Select **OK** to save

Repeat for all meters to be added to Meter Group

To select a Meter Group for Reporting select **Edit/View** against the **Choose Meters** in the Options banner.

Choose Report: Postage Summary [About this report](#) Generic Postal Category

Choose Meters: All Meters (10) selected [edit/view](#)

Choose Time Period: Custom May 2012 to Sep 2012

[Save Setting](#)

Select the **Meter Group**

Select/View Meters

Meter Group or Meter List

All Meters

Training

Select **OK** to proceed

- Account Settings
- Account Settings allows you're the set the following options:
- Fiscal Year start date
 - Account period
 - Calendar Month
 - Calendar Quarter (3 months)
 - Calendar Bi-annual (6 months)
 - Every four weeks
 - Period 4-4-5 (weekly format over quarter)
 - Period 4-5-4
 - Period 5-4-4
 - Account type
 - Account Code (cost centre, etc)
 - Account Name
 - Default Account Level
 - Account
 - Sub Account
 - Sub-sub Account