



Shipping & Mailing  
Postage Meters

# DM300M™

Digital Mailing System (Models  
DM300M, DM400M and DM475M)

## Operator Guide

UK English Edition  
SDC2036B  
9 November 2018

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# 1 - Introduction

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# About your digital mailing system

Your digital mailing system's advanced features include:

- Space-saving, compact footprint.
- Large, easy-to-read display shows system status and prompts you through setup operations.
- Semi-automatic and automatic envelope feeding, transport, and auto-eject.
- Automatic date advance.
- Keyboard-selectable Envelope Messaging (if used).
- Convenient, one-button postage-adding via Postage by Phone® (Using SmartLink™ which requires a network with internet availability or LAN or an internet enabled PC with PC Meter Connect™ software).
- Stacker neatly stacks finished envelopes.
- Ink jet printer provides clear, crisp imprints.
- Weighing platform weighs mail pieces.
- Integrated rating feature calculates correct postage.
- Optional\* date and time stamp for use on incoming mail or on sensitive documents.
- Optional\* Accounting feature tracks postage costs by department (certain models only).
- Password protection limits access to authorised personnel.
- Report printing capability provides hard-copy records of your postage transactions.
- In-line moistener wets and seals envelopes.

- USB communication ports for exporting report data to a PC or for adding optional\* peripherals (scanner, printer).
- LAN connection.
- Permit Prints.
- Mailmark™ compliant.

\* Optional features must be purchased for use with the mailing system.

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**Note:**

Although this guide describes all the features listed above, your DM300M/DM400M Series is a configurable system and availability of the features will depend on your model and options purchased. Inclusion within this guide does not guarantee availability of a particular feature.

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Mailmark™ is a trademark of the Royal Mail

# What is Intellilink™

Your mailing system takes full advantage of IntelliLink™, your digital gateway to an entire suite of services and information that can move your mail more efficiently and enhance your business performance. IntelliLink™ technology gives you the ability to

## *Add postage funds conveniently*

You can add funds to your machine electronically via the Postage By Phone® system.

## *Download Postal Rate Updates*

The latest postal rates are downloaded precisely when you need them.

## *Add Features On Demand*

You can easily download Envelope Messaging and optional product enhancements such as departmental accounting.

## *Keep Your System Current*

Software download capability means you'll always have the latest version of your machine's operating system.

# Postal requirements

The meter on your mailing system is licensed by Royal Mail and you must follow some basic requirements.

- Mail must have the correct date and postage amount in the meter stamp.
- If you move to another address, you must update Royal Mail records. Call your local machine supplier for advice.
- Your DM300M/DM400M/DM475 series is a Mailmark™ compliant system. At regular intervals defined by Royal Mail, it connects to the Pitney Bowes Data Centre to provide usage data to Royal Mail. The connection will normally happen in the background without you needing to do anything. If the connection was not made for any reason, the display will show 'Data Upload Due' and you should select Connect Now. If, for any reason, a connection has not been made within the 'grace' period allowed by Royal Mail, the display will show 'Data Upload Required' and you MUST make a connection before your franking machine will allow you to continue processing mail.
- The tapes for putting postage on larger items must conform to postal specifications. For best performance, obtain tapes direct from your machine supplier.



# Safety

Follow the normal safety precautions for all office equipment:

- 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.
- To obtain supplies, please contact our Supply Line™ to place orders. Material Safety Data Sheets can be obtained on the web or from our Supply Line™. Refer to the Contact Information List for more information.
- Use the power cord supplied with the machine and plug it into a properly grounded wall outlet located near the machine and easily accessible. Failure to properly ground the machine can result in severe personal injury and/or fire.
- Avoid touching moving parts or materials while the machine is in use. Keep hands, loose clothing, jewellery and long hair away from all moving parts.
- Do not remove covers or defeat safety interlock switches. Covers enclose hazardous parts that should only be accessed by properly trained service personnel. Immediately report to service any damaged or non-functioning components that renders the unit unsafe.
- Place the unit in an accessible location to allow for proper venting of the equipment and to facilitate servicing.
- The power cord wall plug is the primary means of disconnecting the machine from the AC supply.
- Do not use an adapter plug on the line cord or wall outlet.

- Do not remove the ground pin from the line cord.
- Avoid using wall outlets that are controlled by wall switches, or shared with other equipment.
- Do not route the power cord over sharp edges or trap between furniture.
- Ensure there is no strain on the power cord and that it does not become jammed between the equipment, walls or furniture.
- Be certain the area in front of the wall receptacle into which the machine is plugged is free from obstruction.
- Before clearing a stoppage, be sure machine mechanisms come to a stop.
- When removing stalled material, avoid using too much force to protect against minor personal injury and damaging equipment.
- To prevent overheating, do not cover any vent openings.
- Operation of this equipment without periodic maintenance will inhibit optimum operating performance and could cause the equipment to malfunction. Contact your machine supplier for required service schedule.
- Read all instructions before attempting to operate the equipment.
- Use this equipment only for its intended purpose.
- Always follow the specific occupational safety and health standards for your workplace.
- This device is not intended for use in the direct field of view at visual display workplaces. To avoid incommodating reflections at visual display workplaces this device must not be placed in the direct field of view.

# Specifications

	<b>DM300M</b>	<b>DM400M</b>	<b>DM475M</b>
Size (including Integrated Weight Platform)	315mm H x 370mm W x 435mm D	315mm H x 840mm W x 500mm D	315mm H x 1296mm W x 572mm D
Weight	10.4 kg approx	17.6 kg approx	30.4 kg approx
Sound Pressure Level	Machine noise is less than 70dBA in accordance with EN ISO 7779, and ANSI 12.10.		
Power Requirements	100-240 VAC, 50/60Hz. 1.0A	100-240 VAC, 50/60Hz. 2.0A	100-240 VAC 50/60Hz 2.0A
Communication Ports	3 USB; 1 RJ-11	3 USB; 1 RJ-11	3 USB; 1 RJ-11 1 RJ-45
Operating Temperature	4°C to 43°C		
LCD Display Size	88 x 44mm	88 x 44mm	95 x 44mm Colour
Throughput* *Actual Throughput will vary, depending on the material used, machine condition, use of moistener, and the skill of the operator.	65 letters per minute	95 or 120 letters per minute	95 or 120 letters per minute Up to 90 letters per minute WOW

	<b>DM300M</b>	<b>DM400M</b>	<b>DM475M</b>
Print Resolution	600 x 300 dpi		
Print Image Area	25.4mm x 180mm		
Ink Cartridge Capacity	45ml		
Internal Envelope Graphic Ad Storage	Up to 20		
Departmental Accounting	Optional. Number of accounts available based on the amount purchased and model.		
Model Number Series	3CXX	4CXX	6CXX 6CF1

# Meter specifications

Maximum Imprint	£99.99
Maximum Credit Setting	£9,950.00
Setting Increment	£50
Reset Type	Postage by Phone
Piece Count	Up to 8 digits (non-resettable)

All Pitney Bowes postage meters are manufactured in accordance with Royal Mail's Franking Machine Standards. This includes ascending register security, which will lock the ascending registers when the first frank takes the most significant digit of the ascending register to 9.



It is certified that the system complies with all applicable directives of the European Union.

# Material specifications

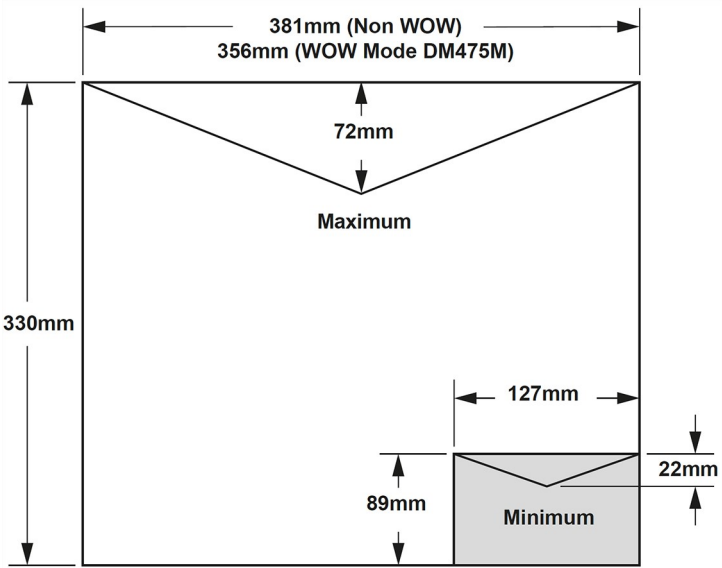
Envelope size (see figure below)	Minimum 89 x 127 mm Maximum 330 x 381 mm (Non WOW) 330 x 356 mm (WOW Mode DM475M)
Envelope flap depth	22 mm Min - 72 mm Max
Envelope thickness	Minimum 0.20 mm Maximum (DM300M) 9.5 mm Maximum (DM400M/DM475M) 8 mm
Stack height for mail	60 mm
Envelope weight	1 g Min - 500 g Max

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## Important:

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

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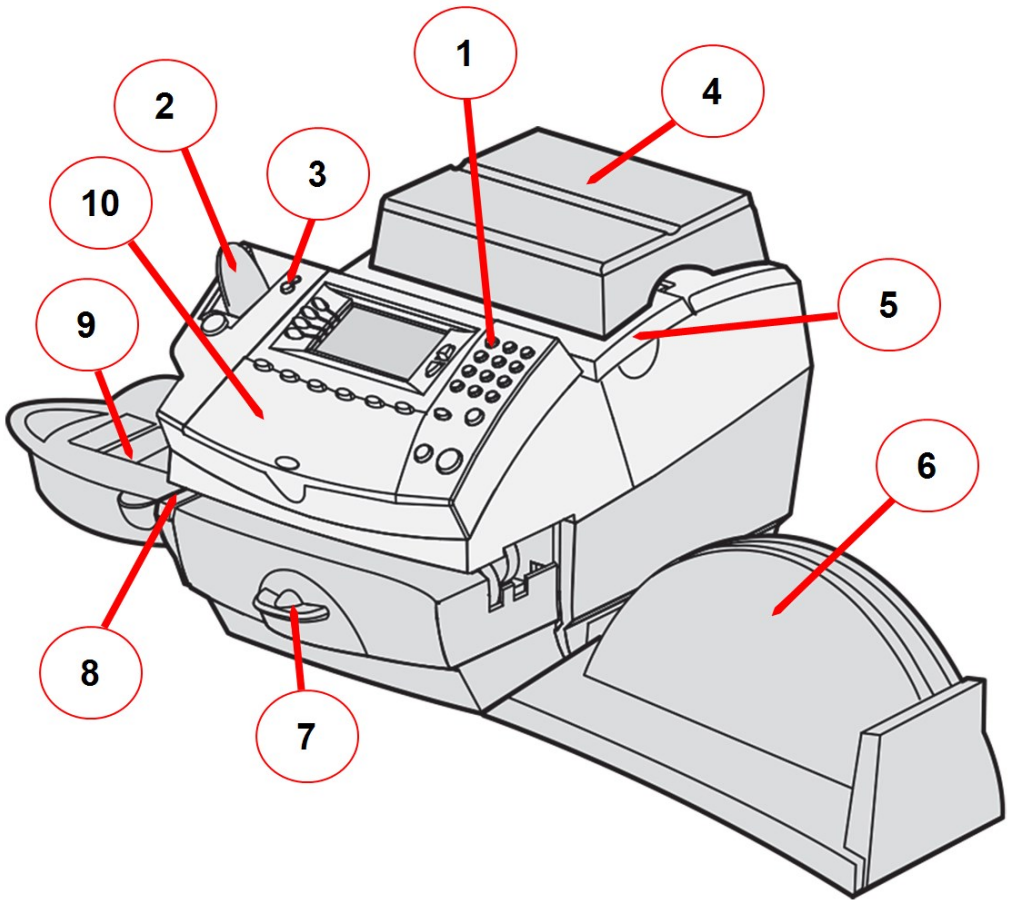
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# Machine features - Front DM300M



1. **Control panel** - Allows you to enter and setup information on your machine (see page 25 for details).
2. **Tape feeder** - Holds and feeds tapes for printing.
3. **LED** - Lights green when your system is on; lights orange when your system is in "sleep" mode.

4. **Weighing platform** - Allows you to weigh and calculate postage of a mail piece based on the service selected.
5. **Ink access cover** - Opens up to allow replacement of the ink cartridge. See *Chapter 7, Maintenance* for instructions.
6. **Stacker tray** - Allows the neat stacking of finished mail pieces. The slot allows convenient storage of your Quick Reference Guide.
7. **Printer Clearance Lever (two positions):**
  - a. Home - transport rollers engaged for processing mail (normal).
  - b. Released - transport rollers disengaged so you can clear a stalled mail piece.

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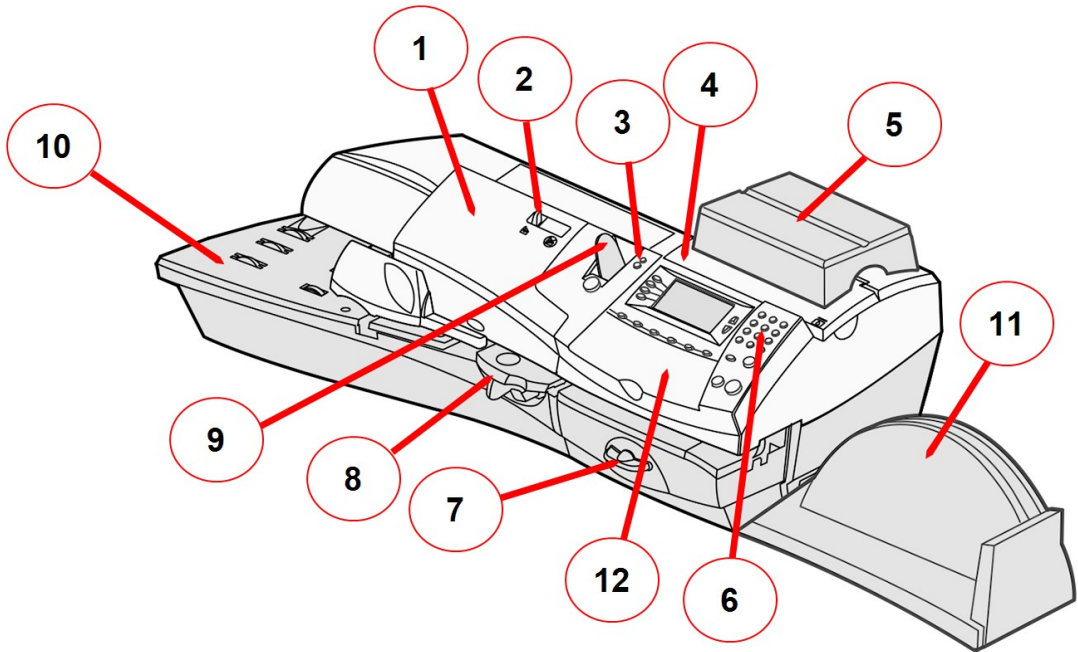
**Note:**

The machine will not process mail when left in the released position.

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8. **Feed deck** - Supports your envelope, post card or tape sheet as it passes under the printer mechanism.
9. **Moistener** - Applies sealing fluid to the envelope flap You can seal envelopes or leave them unsealed, depending on how you feed them.
10. **Qwerty keyboard (under cover)** - For entry of information.

# Machine features - Front DM400M



1. **Feeder cover** - Lift to gain access to the feed and transport mechanisms.
2. **Seal / No Seal lever** - Selects whether your envelopes are automatically sealed or not.
3. **LED** - Lights green when your system is on; lights orange when your system is in "sleep" mode.
4. **Ink access cover** - Opens up to allow replacement of the ink cartridge. See *Chapter 7, Maintenance* for instructions.
5. **Weighing platform** - Allows you to weigh and calculate postage of a mail piece based on the service selected.

6. **Control panel** - Allows you to enter and setup information on your machine (see page 25 for details).
7. **Printer Clearance Lever (two positions):**
  - a. Home - transport rollers engaged for processing mail (normal).
  - b. Released - transport rollers disengaged so you can clear a stalled mail piece.

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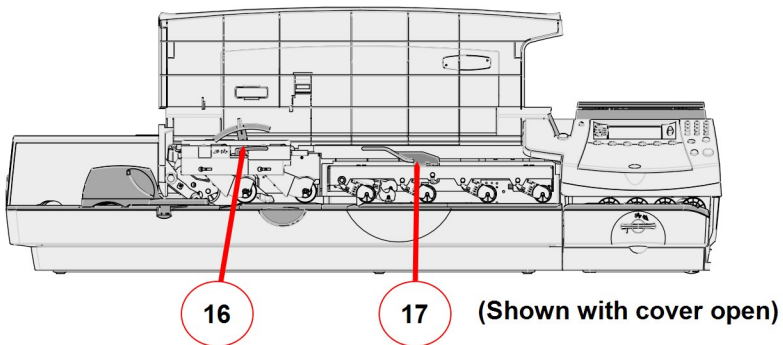
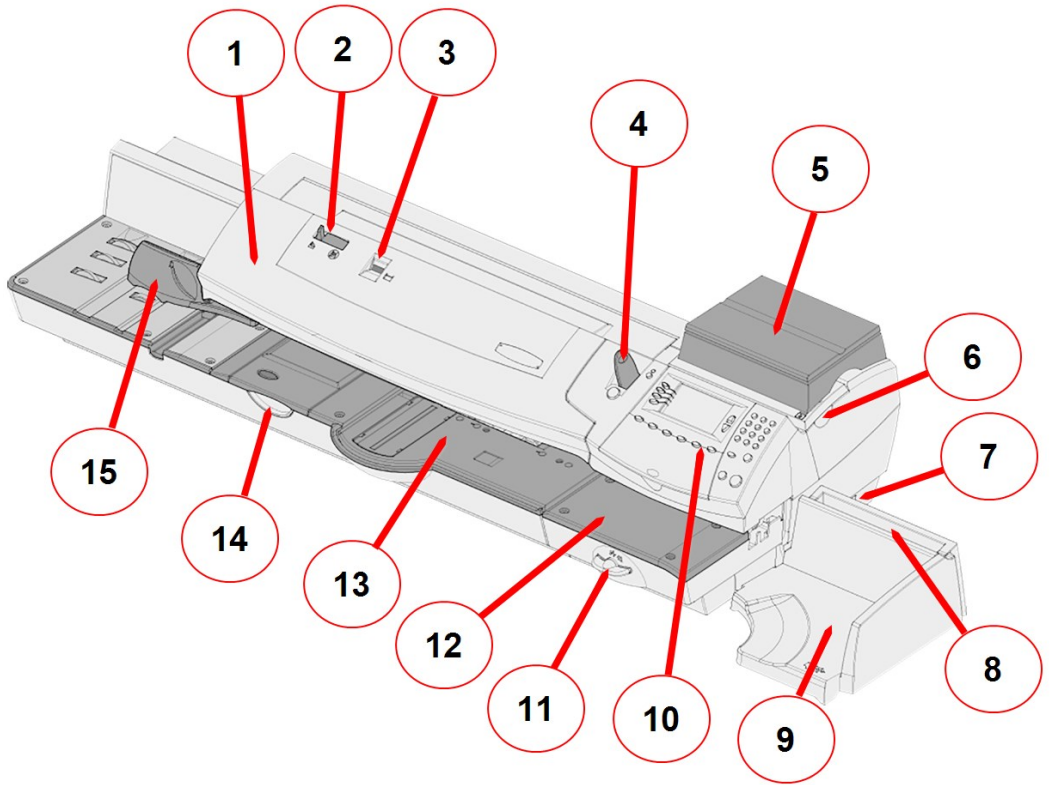
**Note:**

The machine will not process mail when left in the released position.

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8. **Moistener** - Applies sealing fluid to the envelope flap You can seal envelopes or leave them unsealed, depending on how you feed them.
9. **Tape feeder** - Holds and feeds tapes for printing.
10. **Feed deck** - Supports your envelope, post card or tape sheet as it passes under the printer mechanism.
11. **Stacker tray** - Allows the neat stacking of finished mail pieces. The slot allows convenient storage of your Quick Reference Guide.
12. **Qwerty keyboard (under cover)** - For entry of information.

# Machine features - Front DM475M



1. **Feeder / WOW cover** - Open this cover to gain access to the WOW deck and two clearance levers (items 16 and 17).
2. **Seal / No Seal lever** - Selects whether your envelopes are automatically sealed or not.
3. **Sealing Fluid Level Indicator** - Allows you to see how much sealing fluid is left in the tank (red band indicates low level).
4. **Tape feeder** - Holds and feeds tape strips for printing.
5. **Weighing platform (optional)** - Allows you to weigh and calculate postage of a mail piece based on the service selected.
6. **Ink access cover (under optional scale)** - Opens up to allow replacement of the ink cartridge. See *Chapter 7, Maintenance* for instructions.
7. **Ink Waste Tank (in tray under printer section)** - Collects ink waste.
8. **Stacker tray storage slot** - Allows you store the Quick Reference Guide for easy access.
9. **Stacker tray** - Allows the neat stacking of finished mail pieces.
10. **Control panel** - Allows you to enter and set up information on your machine (see next page for details).

11. **Printer Clearance Lever (two positions):**

- a. Home - printer rollers engaged for processing mail (normal).
- b. Released - printer rollers disengaged so you can clear a stalled mail piece.

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**Note:**

The machine will not process mail when left in the released position.

---

12. **Printer deck** - Supports your mail piece or tape strip as it passes under the printer mechanism.
13. **Feeder / WOW deck** - Supports your mail piece as it feeds through the feeder / WOW section.
14. **Moistener** - Applies sealing fluid to the envelope flap (you can seal envelopes or leave them unsealed, depending on the position of Seal / No Seal lever).
15. **Side guide** - Reduces the skewing of pieces of mail as you feed them into the feeder.

16. **Moistener Clearance Lever (two position, under cover):**
- a. Home - printer rollers engaged for processing mail (normal).
  - b. Released - printer rollers disengaged; upper rollers lifted so you can clear a stalled mail piece.
- 

**Note:**

The machine will not process mail when left in the released position.

---

17. **Feeder / WOW Clearance Lever (two position, under cover):**

- a. Home - transport rollers engaged for processing mail (normal).
  - b. Released - transport rollers disengaged; upper rollers lifted so you can clear a stalled mail piece.
- 

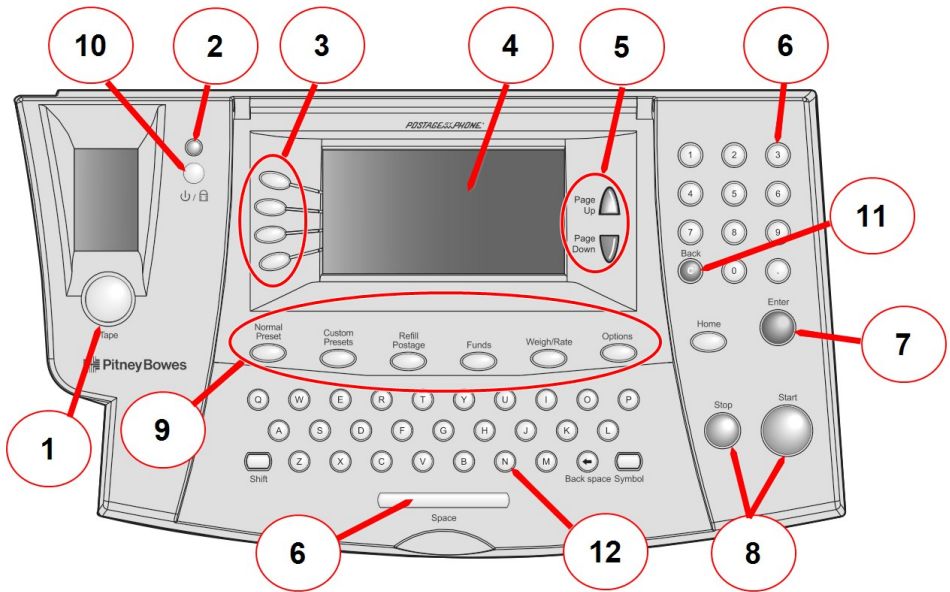
**Note:**

The machine will not process mail when left in the released position.

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# Control panel



1. **Tape key** - Press to print tape(s).
2. **Lock / Power key** - Dual function. Prevents unauthorised use of your system. If lock feature is setup and machine is in "sleep mode"; entering your four-digit password unlocks (awakens) the machine. Also allows you to power up or power down machine.
3. **Screen selection keys** - Allows you to select a line (one key for each line) on the operator display. Whenever the left arrow (◀) occupies the first position in one of the display lines, you may press the corresponding Screen Selection key to select that line.
4. **Operation display** - Shows the current status of your system and prompts you through all setup operations.

5. **Page up / Page down (Scroll keys)** - Allows you to scroll up and down through menu choices in the operator display. If a Page Up / Down key is lit, it indicates additional choices are available in a menu (up or down, depending on key) and that Page Up / Down key can be pressed to access these further choices.
6. **Alpha / Numeric keypads** - Allows you to type in numbers and letters for account names, postage values, and other information.
7. **Enter key** - Allows you to accept an entry or choice.
8. **Start / Stop keys** - Allows you to start or stop feeding tapes or envelopes.

9. **Feature keys** - Allows you quick access to the most common features on the system. Pressing a Feature key takes you immediately to the top-level screen of the feature for that key.
  - a. **Home** - Takes you back to the Home (date/postage) screen.
  - b. **Normal preset** - Allows you access to the normal settings you use most often. You can assign values such as postage amount, Envelope Messaging, account number, etc. to the Normal Preset using the Feature keys on the control panel. See *Chapter 4, Presets* for details.
  - c. **Custom presets** - Allows you access up to five custom settings. You can assign values such as postage amount, Envelope Messaging, account number, etc. to the custom presets using the Feature keys on the control panel. See *Chapter 6, System Options* for details.
  - d. **Refill postage** - Allows you to add (refill) postage funds to your machine conveniently via your LAN or an internet enabled PC. See *Chapter 5, Adding Postage* for details.
  - e. **Funds** - Allows you to check your postage funds and number of mail pieces processed. See *Chapter 5, Adding Postage* for details.
  - f. **Weigh / Rate** - Allows you to weigh and calculate postage based on service selected. See *Chapter 3, Running Mail* for details.
  - g. **Options** - Allows you to access system setup information such as date, time, postage limits, accounts setup, phone parameters, etc. See *Chapter 6, System Options* for details.
10. **LED** - Lights green when your system is on; lights orange when your system is in "sleep" mode.
11. **Back / C key** - Allows you to move back one level in a menu, or clear an entry.

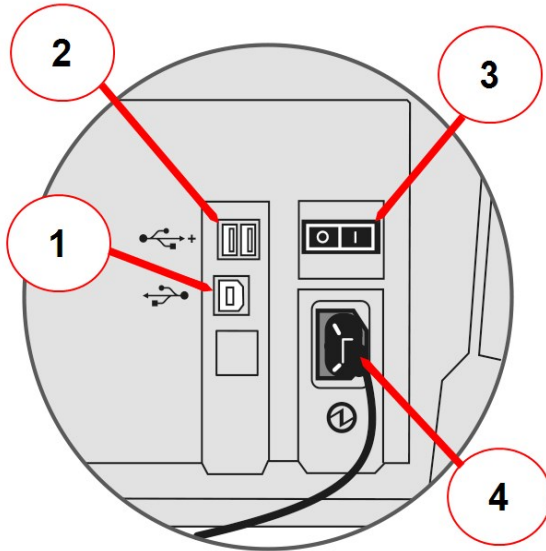
12. **Qwerty keypad (under its own cover)** - Allows you to type in letters and special characters for account names and text messages.
- 

**Important:**

When you press one of the Feature keys, any entry in the preceding screen is lost unless you have first pressed the **Enter** key to confirm the entry. For example, if you entered an account name on one screen and then immediately pressed another Feature key, the account name will not be recorded by the system.

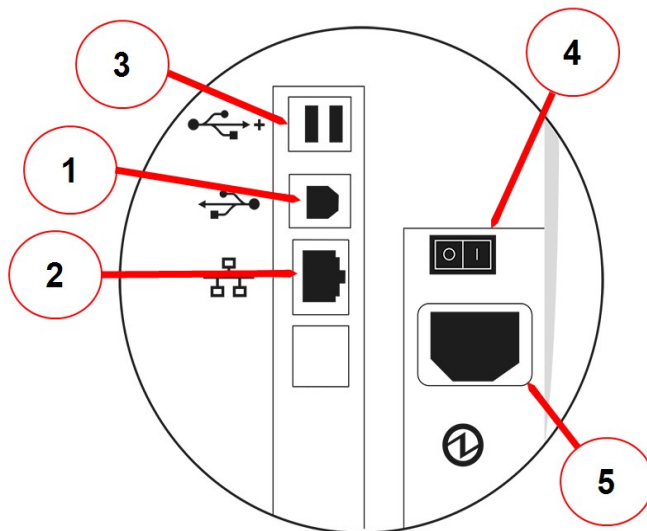
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# Machine features (DM300M / DM400M) - Rear



1. **USB B port** - Allows you to connect a SmartLink™ device (preferred method) or a PC for use with PC Meter Connect™ software.
2. **USB A ports** - Allows you to connect via a USB to LAN network interface and peripherals (scanner, external scale, INVIEW accounting).
3. **Power receptacle** - Connects to AC power cord (supplied).
4. **Power switch** - Turns power ON or OFF to machine.

# Machine features (DM475M) - Rear



1. **USB B port** - Allows you to connect a SmartLink™ device (preferred method) or a PC for use with PC Meter Connect™ software.
2. **LAN port** - Allows you to connect your system to the Pitney Bowes Data Centre via a LAN network that has internet access.
3. **USB A ports** - Allows you to connect via a USB to LAN network interface and peripherals (scanner, external scale, INVIEW accounting).
4. **Power switch** - Turns power ON or OFF to machine.
5. **Power receptacle** - Connects to AC power cord (supplied).

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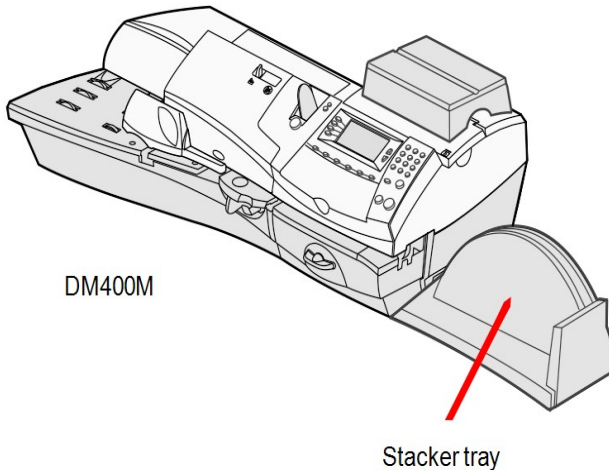
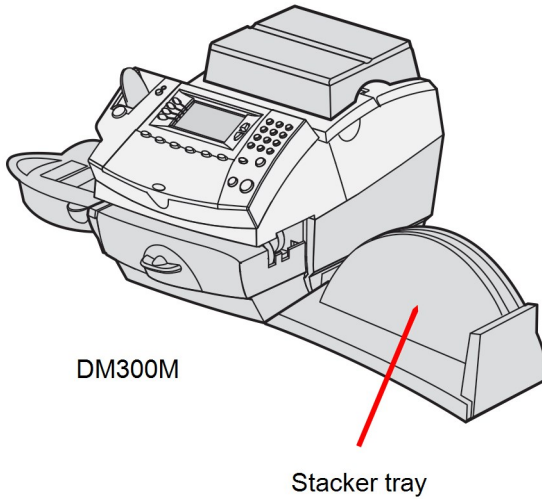
**Note:**

Take care not to move your system when connecting and disconnecting SmartLink, LAN, USB or Power connectors as it could disturb existing connections. See page 32 for further information.

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# Moving the DM300M / DM400M

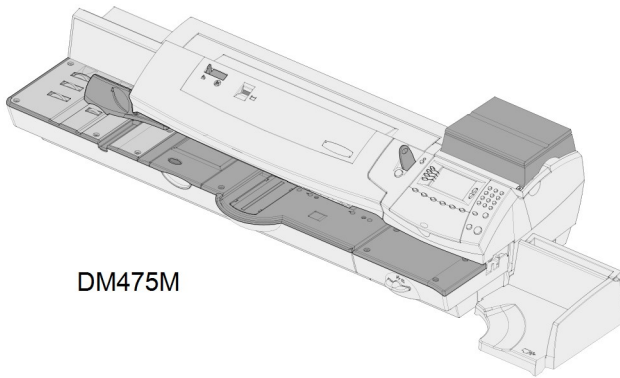
If you need to move your DM300M/DM400M mailing system, simply unplug the power and any other cables attached to the back of the machine (see figure on previous pages) and slide the stacker tray away from the unit.





## **Warning: Do not move the DM475M by yourself**

You should not move the DM475M machine by yourself. Call Pitney Bowes to arrange a Service visit.



---

### **CAUTION!:**

Do not move the DM475M by yourself. The machine is made to separate into two sections, and by moving without proper dis-assembly, you may:

- Cause serious injury to yourself.
- Cause serious damage to the machine.
- Cause the WOW module to go out of calibration.
- Void any service warranties.

Contact Pitney Bowes to arrange a Service visit for moving the machine (additional charges may apply).

---

# 3 - Running mail

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# Before you begin

Before you run mail on your system, review the Checklist, Home Screen, and Selecting Postage sections below and on the following pages.

## *Checklist*

- Make sure your mailing system is plugged into a properly grounded power receptacle. Always follow the safety precautions in *Chapter 1, Introduction*.
- Check the level of sealing solution in the moistener. If you need to add sealing solution, refer to *Chapter 7, Maintenance*.
- If you plan on printing tape sheets, make sure you've got an adequate supply. See *Chapter 9, Supplies and Options* for ordering tape sheets.
- Check that you have enough postage for your mail run. Press the **Funds** key to view your current balance.

# Home screen

When you power up your system, the Home screen appears on the operating display. If your system has been set up to require a lock code or password, you are prompted to enter it.

A typical Home screen is shown below (your screen may vary dependant on options selected):

Scale Weight	≡0.00≡
0g	10.10.18
◀Account	: Select Account
◀Class	: None
◀Ad	: None
◀Text Msg	: None



(The Up/Down arrow keys light up in green when there are additional menu options)

- Select “Postage”.
- Use **Page Down** and **Page Up** keys to scroll through menu features. If the key is lit, additional choices are available.
- If you would like to print ads / text messages on your mail or access other print options, press **Page Down** to view these features.

# Selecting postage

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

- Place the mail piece on the weighing platform and have the system calculate the weight and then postage amount using the system's internal rating feature.
- WOW (DM475M Only). Place mail on the deck, the system will calculate the price of each item automatically, based on its size and weight as the mailpiece goes through the machine.
- Enter the weight of the mail piece manually and have the system calculate the postage amount using the system's internal rating feature.

Each method is described in its own section that follows.

---

## Note:

To process large mail pieces and parcels that can't be run through the machine, use the optional tapes (see *Chapter 10, Supplies and Options* for ordering tapes). Apply the postage tapes on the mail piece or parcel in the proper location.

---

# Using the weighing platform

## *'Standard' Operation*

1. Make sure scale is activated (you will see “scale weight” and 0g on the display). See *Chapter 6, System Options* to turn your scale on if necessary.
2. Place the mailpiece on scale. The weight of the mail piece will appear on the display.
3. Select the desired carrier, then select the class of mail you require (use the scroll keys to see additional classes).
4. If there is no value next to the class name, more information is needed. Follow the prompts for the options and/or services available for this class of service.
5. Press **Enter** when finished entering all the class options and fees.

# Differential weighing

Differential weighing is an option that is available on certain models in the DM300M, DM400M and DM475M series.

It allows you to process mixed mail using the weighing platform (scale). Put a number of pieces of mail onto the weighing platform. The system calculates the postage for each piece of mail you remove from the weighing platform automatically.

1. Make sure weighing platform is activated (you will see “scale weight“ and 0g on the display). See *Chapter 6, System Options* to turn your scale on if necessary.
2. Select the desired carrier, then select the class of mail required (use the scroll keys to see additional classes).
3. If there is no value next to the class name, more information is needed. Follow the prompts for the options and/or services available for this class of service.
4. Press the **Weigh/Rate** key.
5. Select “Differential Weighing”.
6. Place the mail pieces onto the weighing platform. They can be placed onto the platform in a container, if required.
7. Remove the first mail piece and the value will automatically set. Process this mail piece in the normal way.
8. Continue removing mail pieces and processing until the last mail piece is reached. When the last piece (or mail container) is removed from the platform, you will be asked to “Print Postage for last item removed”. Select “Yes” or “No”.
9. You can now place more items on the platform to continue using the option or select “Exit Differential Weighing”.



# Entering weight manually

This procedure is used when you already know the weight of a mail piece and you do not wish to use the weighing platform.

1. Press the **Weigh/Rate** key.
2. Select “Enter Weight Manually”.
3. Select “Enter Weight in grams/ kilograms” to switch between entering the weight in grams or kilograms, as required.
4. Key in the weight in grams or kilograms then select “OK”.
5. Select the desired class using the soft keys.

# WOW® (Weigh-on-the-Way) and Pricing in Proportion (DM475M)

When enabled, the Weigh-on-the Way (WOW®) feature increases your productivity because you don't have to presort the mail by weight before loading the pieces onto the machine. The DM475M has a special scale built into its deck that can weigh mail pieces on-the-fly (that is, as they pass along the deck) so the system can determine the correct postage of each item. You can feed mail pieces having various weights (10 g, 20 g, 30 g, etc.) into the machine and the machine will weigh and apply the correct postage to each piece automatically.

---

## Note:

The maximum length of a mail piece that can be processed is 380 mm when running in non-WOW® mode and 355 mm when running in a WOW® mode.

---

## Important:

To avoid mail processing errors:

- Do not touch or accidentally brush against the width sensor or the deck during WOW® mode while running mail.
- Do not tamp the mail on the mail / WOW® deck
- Do not use the mail / WOW® deck as a work surface

In addition, the DM475M has the ability to rate your mail pieces according to your postal authority requirements for pricing in proportion and to rate mail pieces based on thickness, length, or width, in addition to weight.

To rate your mail according to your postal authority's shape-based requirements, the system must be in WOW® mode and you must select a class where Automatic Rating is available.

# Surcharge payments

Occasionally, your postal authority may need an additional payment (underpayment), etc). To produce a Frank for payment, Press the 'C' key, select "Class" and then select "Surcharge Payment". You can now enter the value you require, confirm the amount and take a frank in the normal way.

## *Other Royal Mail Services*

Other Royal Mail services are also available:

- Keepsafe
- Group Annual
- Shredding services
- Single collection

# Selecting an account to track postage

You can select an account to track postage if the departmental accounting feature is available on your machine and is turned on. Departmental accounting may not be available on some models. See *Chapter 11, Departmental Accounts*, for information on setting up this feature.

1. From the Home screen, press the selection key next to “Account” to display the Accounts menu.
2. The "Select Account" screen displays. Press **Page Down** to see more choices (if Page Down is lit). To select an account, either:
  - a. Use the appropriate selection key next to the display.
  - b. Key in the account number if you know it and press **Enter**. (The machine will display account names as the number progresses).
  - c. Key in the first character of the account name, using the alphanumeric keys. Select the account or press **Enter** to select the first account for the character. (You can enter more than one character to advance your search).
3. If a password has been assigned to this account, you will be prompted to enter one. Key in the 4-digit password if necessary.
4. You return to the Home screen with the name of the account listed alongside “Account”.

---

Note:

If you have the optional Budget Manager / INVIEW accounting system, refer to page 254 for details of selecting an account.

---

# Envelope messaging

1. From the Home screen, select “Ad” or “Text Msg” as required.
  2. You may either:
    - a. Scroll through the list and then select the required Graphic Ad or Text Message.
    - b. Key in the Graphic Ad or Text Message number and press **Enter** to select it.
  3. You return to the Home screen with the name of the Graphic Ad or Text Message listed on the screen.
- 

## Note:

Graphic Ads are available on all models. Text Messages are only available on certain models.

---

# Advancing the date on the machine

The DM300M / DM400M / DM475M Series will automatically advance the date printed at 5:30 pm.

However, you may want to advance the date to prepare outgoing mail for a future day's mailing.

---

## Note:

Please keep in mind the following when using this feature:

- Changing the printed date does not change the system'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 system's internally held date (in an effort to "backdate" the mail).
- The number of days you can advance the print is limited to 30 days. This limit is set by Royal Mail.

- 
1. Press **Options**.
  2. Select "Printing Options".



3. Select "Set or Advance Date". The system displays the current date. You may either:
  - Select "Set to today's date". You will be returned to the Home screen with the current (today's) date set.
  - Select "Advance one day".
  - Select "Specify Days to Advance" if you want to prepare mail more than one day in advance.
4. Select **OK**.

# Checking and clearing the batch count

You can view the accumulated postage value and piece count information from the batch register and print this for your records. You can also clear or reset the batch count to zero.

## *Checking the Batch Count*

1. Press **Funds**.
2. Press **Page Down**.
3. The display shows the batch information.
4. Press **Home** to return to the Home screen.

## *Printing a Record of the Batch Count information*

1. Press **Funds**.
2. Press **Options** and select "Print Funds Report".
3. At the prompt, either...
  - Feed an envelope. **DM300M**: Place the envelope up against the back wall of the system and slide it to the right until the system grasps it. **DM400M / DM475M**: Load an envelope onto the feeder and press **Start**.

Or

- Press the **Tape** key. The funds report is printed and the envelope / tape strip is ejected
4. At "Printing Complete" press **No** to return to the Home screen or **Yes** if you want to print other reports.

### CAUTION:

Make sure you really want to clear the batch register; once you do, you can't restore the data.

---

1. Press **Funds**.
  2. Press **Options** and select "Clear batch value".
  3. At the "Confirm Clear" prompt, press the "Yes" key to confirm. The batch value and batch piece registers return to zero and the machine returns to the funds screen.
- 

### Note:

This function may require entry of the Supervisor Password. If this is the case, enter the 4-digit Supervisor Password. The batch value and batch piece registers return to zero.

---

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

# Printing mail

---

## Note:

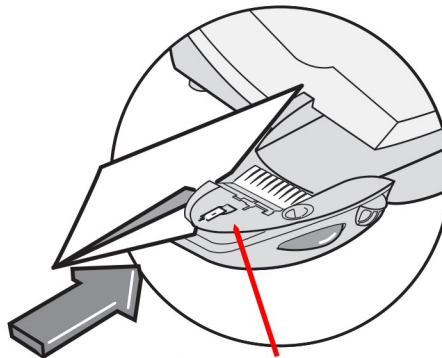
To apply postage to large items of mail and parcels that can't be run through the machine, use tape as described on page 63.

---

Select the postage required, account (if accounting is on), Envelope Messaging and batch function as described on pages 45 - 58.

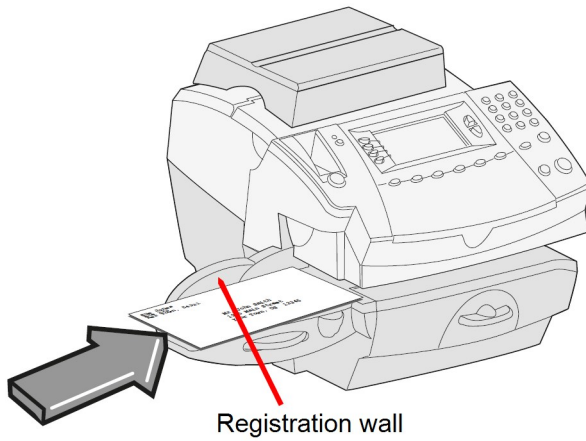
## *Manually Feeding Envelopes (DM300M)*

1. If using the moistener, place the envelope flap under the moistener stripper and move the envelope towards the right.



Moistener stripper

2. Position the envelope against the registration wall of the system and slide it to the right until the system grasps it. The system prints the digital meter stamp and ejects the envelope.



# Automatically feeding envelopes (DM400M / DM475M)

1. Load envelopes into the feeder face up with their top edges against the registration wall.
2. Slide the side guide up to the envelopes.

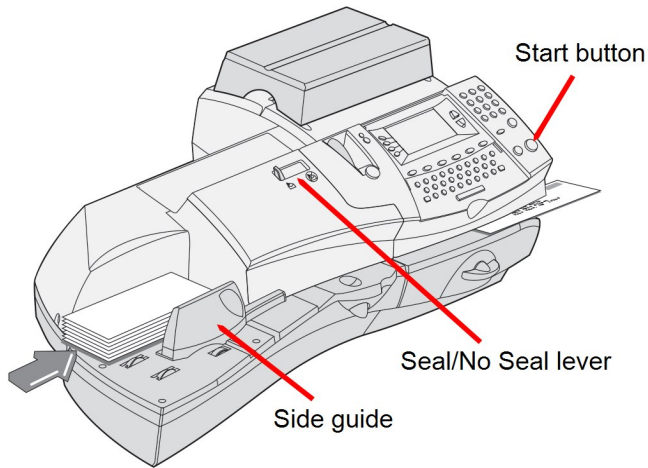
---

## Note:

Allow at least 1.6 mm clearance so that envelope feed is not restricted. If the gap is too large mail may pass through without printing.

---

3. Select seal or no-seal using the Seal / No Seal Lever.
4. Press **Start**. The system automatically feeds the envelopes, prints the digital meter stamp and ejects the envelope.



Model shown DM400M

---

### IMPORTANT:

Always ensure that your prints are clear and complete. Poor prints may be rejected by your Postal Authority. If you notice missing lines in the print as shown in the illustration, perform a printhead purge as described on page 156 of this guide.



**The indicia above is a black and white representation of the approved Blue indicia. Only Blue Non-Fluorescent approved ink should be used in the machine.**

# Printing tapes

Use tapes to apply postage to large items of mail and parcels that can not be run through the machine.

## Printing a single tape

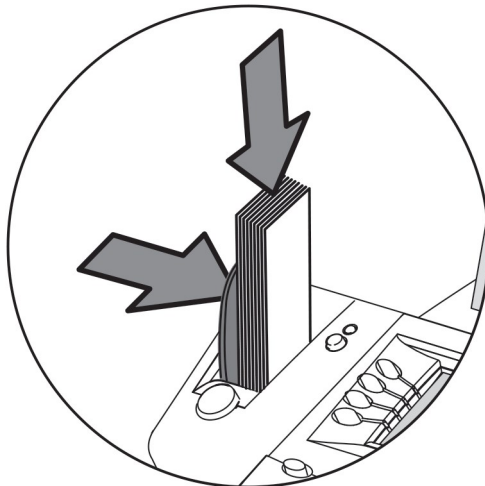
1. Push the tape lever to the right and drop tapes down into the slot.

---

### Note:

The printable side of the tape should be facing towards the right.

---



2. Press **Tape** when ready to print. By default, a single tape will be printed.



### Note:

Ensure the system is configured to print multiple tapes. See *Chapter 6, System Options*, Configuring the Tape Button.

---

- If the system is ready to print postage and on the Home screen, simply type in the number of tapes you wish to print and press the **Tape** button, OR
  - Press the **Tape** button. You will be prompted to enter the tape quantity. Press the **Start** button to begin printing tapes.
- 

### Note:

If the machine is set for WOW operation, tapes cannot be taken. Select a non-WOW rate to use tapes (DM475M UK only).

---

---

### IMPORTANT:

Always ensure that your prints are clear and complete. Poor prints may be rejected by your Postal Authority. If you notice missing lines in the print as shown in the illustration, perform a printhead purge as described on page 156 of this guide.

---

# WOW mode

1. Press the **Weigh/ Rate** key.
2. Select WOW- Weigh on the Way. The machine weighs each piece, calculates the rate before applying postage.

OR

3. Select W1P- Weigh First Piece. The first mailpiece is weighed and the rate is calculated. All the following mailpieces are priced at the same rate.
4. Select a class of mail which is capable of Automatic Pricing.
5. Load and run the mail, see page 54.

---

## IMPORTANT:

Always ensure that your prints are clear and complete. Poor prints may be rejected by your Postal Authority. If you notice missing lines in the print as shown in the illustration, perform a printhead purge as described on page 156 of this guide.



**The indicia above is a black and white representation of the approved Blue indicia. Only Blue Non-Fluorescent approved ink should be used in the machine.**

---

# Printing options

There are various options available when processing mail through the system. You can:

- Seal the envelope only (No Printing)
- Print the date and time or Envelope Messaging on incoming mail.
- Add a Text Message.
- Set Printing Position (preset - not changeable)

---

## Note:

These may not be available on your model.

---

# Seal the envelope only

You can set up your mailing system to seal envelopes without printing a digital meter stamp on them.

1. Press **Options**.
2. Select "Printing Options".
3. Select "Seal Only (No Printing)". The "Seal Only MODE (NO PRINTING)" screen appears.
4. Process the envelopes as described on pages 52 - 55. On the DM400M/DM475M make sure the Seal / No Seal Lever is set to the 'Seal' position.
5. Select "Exit Seal Only" when finished to return you to the Home screen.

# Printing the date and time or Envelope Messaging on incoming mail

You can set up your mailing system to print the date and time, a Graphic Ad or Text Message on incoming pieces of mail. This feature is only available on certain models in the DM300M / DM400M / DM475M series.

1. Press **Options**.
2. Select "Printing Options".
3. Select "Text-Ad-Date-Time Mode."
  - **Date-Time** -This option allows you to toggle between "Print" and "Do Not Print."
  - **Ad** - This option allows you to select a Graphic Ad to print on the envelope/tape.
  - **Text** - This option allows you to select a Text Message to print on the envelope/tape. Refer to page 3-18, Text Messages for more information.
4. Feed envelopes as described on pages 52 - 55.

---

## Note:

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

---

5. Select “Return to Normal Mode” when finished to return you to the Home screen.

# Permit printing

This option allows you to use your system to print postage paid impressions. It is only available if you have a licence with your Postal Authority to process 'bulk' mail.

1. Press **Options**.
2. Select "Printing Options".
3. Select 'Permits'.
4. Select any other printing elements required by your Postal Authority and process your envelopes in the normal way.

# Text messages

Text Messages are only available on certain models in the DM300M / DM400M / DM475M series.

## *What is a Text Message?*

A Text Message is a user defined message typed in via the machine's keyboard that can be printed on your digital meter stamp.

It can be up to 5 lines, each of 20 alpha/numeric characters and prints in a position to the left of the meter stamp.

Up to 5 Text Messages can be programmed into the machine.



# Selecting a text message

1. Press **Page Down** (if necessary).
2. Select "Text Msg". The display lists all messages created on your system.
3. Press **Page Down** to see additional choices (if available).
4. Select the message you want to use. You return to the Home screen with the name of the message on the screen.

# Viewing a text message

1. Press **Options**, then **Page Down**.
2. Select "Text Messages".
3. Select "View/ Edit Messages". The display lists all messages created on your system.
4. Press **Page Down** to see additional choices (if available).
5. Select the message you want to view. It will be displayed on the screen.
6. Press **Home** to return to the Home screen.

# Creating a text message

## *To create the first Text Message:*

1. From the Home Screen, select "Text Msg".
2. Select "Create New Text Message".
3. Accept the warning regarding the use of text messages.
4. Enter the name you want to call this text message, then select "OK".
5. Select "1" and enter your first line of text. It can be up to 20 alpha/numeric characters long. When finished, select "OK" or Edit next line.
6. Continue entering up to 5 lines of text (use the **Page Down** key to display line 5, if required). When you have completed your message, press **Enter**.

## *To create subsequent Text Messages:*

1. Press **Options**, then **Page Down**.
2. Select "Text Messages".
3. Select "Create New Message" and continue from step 3 above.

---

### IMPORTANT:

In accordance with Postal and Advertising Standards requirements the Envelope Messaging (Ad-slogan) and Text must not be obscene, defamatory of any person or group, or deceptive, nor may it advocate unlawful action. The Envelope Messaging (Ad-slogan) must not emulate any form of valid indicia or payment for postage.

---

# Delete a text message

1. Press **Options**, then **Page Down**.
2. Select "Text Messages", then "Delete Message". The display lists all messages created on your system.
3. Press **Page Down** to see additional choices (if available).
4. Select the message you want to delete.
5. You will be asked to confirm the deletion by selecting "Yes" or cancel the deletion by selecting "No".

# Edit a text message

1. Press **Options**, then **Page Down**.
2. Select "Text Messages".
3. Select "View/Edit Messages". The display lists all messages created on your system.
4. Press **Page Down** to see additional choices (if available).
5. Select the message you want to edit.
6. Select the line of the message you want to edit, then select "Edit Options". You can use the "Move Cursor Left" or "Move Cursor Right" to select the text you wish to overwrite.

---

## IMPORTANT:

In accordance with Postal and Advertising Standards requirements the Envelope Messaging (Ad-slogan) and Text must not be obscene, defamatory of any person or group, or deceptive, nor may it advocate unlawful action. The Envelope Messaging (Ad-slogan) must not emulate any form of valid indicia or payment for postage.

---

7. Select "OK" once changes are complete.

# Edit a text message name

1. Press **Options**, then **Page Down**.
2. Select "Text Messages".
3. Select "Edit Message Name". The display lists all messages created on your system.
4. Press **Page Down** to see additional choices (if available).
5. Select the message name you wish to edit.
6. Press the **C** key to clear the existing name, and type a new name.
7. When complete, select "OK".

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# 4 - Presets

## In this section

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# What is a preset

A preset is a setting you can call up at the touch of a button that holds pre-defined values such as class of mail, Envelope Messaging, account number (not normal preset), postage amount (ROI only), etc. within your machine. Your system has a "normal" preset (stores the settings you use most often) which is accessed by pressing **Normal Preset**. It also has the ability to store up to 10 custom presets which are accessed by pressing **Custom Presets** and choosing the desired preset from the menu.

You don't have to program the values that go into a preset in the traditional sense. Instead, the system takes a "snapshot" of the current values on your machine when you define a preset. For example, if the machine is set up to print a Graphic Ad and has a class of mail, this is the condition that will be recorded by the system when you define a preset (either Normal or Custom).

If you need to change the values of a preset, just change the machine condition by pressing the appropriate feature keys and establishing the proper settings (such as no graphic ad, class of mail, etc.). The custom or normal preset will then pick these new settings when you define them in the custom presets menu.

## *Normal Preset*

Your Normal preset as shipped from the factory uses these settings: no class of mail, no graphic ad chosen and printing date. These settings can be changed.

---

## IMPORTANT:

In accordance with Postal and Advertising Standards requirements the Envelope Messaging (Ad-slogan) and Text must not be obscene, defamatory of any person or group, or deceptive, nor may it advocate unlawful action. The Envelope Messaging (Ad-slogan) must not emulate any form of valid indicia or payment for postage.

- You cannot delete the normal preset.
  - You cannot modify the name of the normal preset.
  - There is no option to "edit" the normal preset, but you can define new values for the normal preset based on the current condition of the machine.
  - Preset postage values are subject to the high value warning.
  - **On the date a rate change becomes effective, always check the postage values assigned to all presets to make sure that they comply with the new rates.**
-

# Selecting a normal preset

The Normal Preset can be selected by simply pressing the **Normal Preset** key.

The system will always set itself to the normal preset values when power is turned on.

## *Viewing the Normal Preset*

1. Press **Options**.
2. Press **Page Down** and select "Preset Options".
3. Select "Set Normal Preset".
4. Select "View Settings".
5. The first screen of defined values for the normal preset is listed. Press **Page Down** to see the remainder of the defined values.
6. When finished, press **Home** to return to the Home screen.

# Defining new values for the normal preset

To define new values (change the settings) for the Normal preset:

1. Establish the proper settings on the machine (such as no graphic ad, a particular class of mail, etc.) that you want the preset to contain.
2. Press **Options**.
3. Press **Page Down** and select "Preset Options".
4. Select "Set Normal Preset".
5. You will be prompted to confirm current settings are correct:
  - a. If you select "OK", the new values are saved and you return to the Preset Options menu.
  - b. If you select "View Settings", the system will display the current values. Press **Page Down** to see the remainder of the current values. Press **Enter** to return to the menu.
  - c. If you select "Exit", you return to the Preset Options menu without saving your changes.
6. Press **Home** to return to the Home screen.

# Custom presets

Your system can store up to 10 custom presets.

## *Selecting a Custom Preset*

1. Press **Custom Presets**.
2. The display lists all presets created on your system. Press **Page Down** to see additional choices (if available).
3. Select the preset you want to use. You return to the Home screen with the preset values chosen.

# Viewing a custom preset

1. Press **Options**.
2. Press **Page Down** and select "Preset Options".
3. Select "View Preset Settings". the display lists all presets.
4. Select the preset you want to view. The first screen of defined values for the Custom Preset is listed. Press **Page Down** to see the remainder of the defined values.
5. Press **Enter** to select a preset. Press **Home** to return to the Home screen without selecting the preset.

---

## IMPORTANT:

- Preset postage values are subject to the high value warning.
  - **On the date a rate change becomes effective, always check the postage values assigned to all presets to make sure that they comply with the new rates.**
-

# Defining a new custom preset

To define new values or create a new custom preset:

1. Establish the proper settings on the machine (such as no graphic ad, class of mail, a specific departmental account, etc.) that you want the preset to contain.
2. Press **Options**.
3. Press **Page Down** and select "Preset Options".
4. Select "Create New Custom Preset".
5. The system will prompt for the name of this preset. Type in a name for the preset. It can be up to seventeen alpha/numeric characters long. When finished, select "OK".
6. You will be prompted to confirm if all current settings are correct.
  - a. If you select "OK" the new values are saved and you return to the preset options screen.
  - b. If you select "View Settings", the system will display the preset name and the current values. Press the down arrow key to see the remainder of the defined values. Press **Enter** when done viewing the preset settings. If you want to use the preset as is, select "OK". If you do not want to use the preset as is, select "Exit" to return to the "Preset Options" screen.
  - c. If you select "Exit" you return to the home screen.
7. Press **Home** to return to the Home screen.

# Editing a custom preset name

You may change the name of a preset if you want.

1. Press **Options**.
2. Press **Page Down** and select "Preset Options".
3. Select "Edit Preset Name" and then Select the preset you want to edit.
4. The system will prompt for the new name of this preset. Press the **C** key to clear the current name, then key in the new name for this preset. It can be up to seventeen alpha/numeric characters long.
5. When finished, select "OK". You return to the Preset Options menu.
6. Press **Home** to return to the Home screen.



# Overwriting a custom preset

Overwriting a preset reassigns all the values assigned to it.

---

## CAUTION!:

Once you overwrite a preset, its values are gone. You can't recover an overwritten preset.

---

1. Press **Options**.
2. Press **Page Down** and select "Preset Options".
3. Press **Page Down** and select "Overwrite Preset". the display lists all presets.
4. Select the preset you want to overwrite.
5. You will be prompted to confirm current settings are correct.
  - a. If you select "OK" the new values are saved and you return to the preset options screen.
  - b. If you select "View Settings", the system will display the current values. Press **Page Down** to see the remainder of the defined values.
  - c. If you select "Exit", you return to the preset options screen.
6. Press **Home** to return to the Home screen.

# Deleting a custom preset

Deleting a preset removes all the values assigned to it and removes it from the Presets Menu.

---

## CAUTION!

Once you delete a preset, its values are gone. You can't recover a deleted preset.

---

1. Press **Options**.
2. Press **Page Down** and select "Preset Options".
3. Press **Page Down** and select "Delete Preset". the display lists all presets.
4. Select the preset you want to delete.
5. At the "Confirm Delete" screen, select "Yes". The preset is deleted. You return to the Preset Options menu.
6. Press **Home** to return to the Home screen.

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# 5 - Adding postage / Connecting to Data Centre

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# About the Postage by Phone® system

The Postage by Phone® System allows you to obtain postage funds for your DM300M / DM400M / DM475M series without leaving your office - all you need is a SmartLink™ device, LAN (Local Area Network) connection or an Internet enabled PC using Pitney Bowes PC Meter Connect™ (PCMC) software.

## *How does the system operate?*

The system consists of a central computer situated in our Data Centre which holds details of the funds available in your Postage by Phone® account. Your DM300M / DM400M / DM475M series communicates with the Data Centre and transfers funds from your Postage by Phone® account into your meter.

## *Preparing to Refill with Postage*

Adding postage funds to your system is fast, easy and convenient. Your system must be connected to a SmartLink device, LAN or an Internet enabled PC as described on the following pages.

---

### IMPORTANT:

**For printing postage, your DM300M / DM400M / DM475M series does not have to be connected.** However, we recommend you keep the meter connected to your SmartLink device, LAN or Internet enabled PC as the system needs to connect regularly to upload Royal Mail data.

---

# Connecting your DM300M - DM475M via SmartLink™

---

## Note:

If you are installing your SmartLink™ using a wireless connection you should connect your power cord to the back of your meter and power up **now** before proceeding to the connection instructions below.

---

## *SmartLink device connection*

### **Wired**

Installation takes about 10 minutes.

Requires an available internet port and power socket.

**Follow the instructions below to connect.**

### Or Wireless

Installation takes about 15 minutes.

Requires a computer and access to a wireless network.

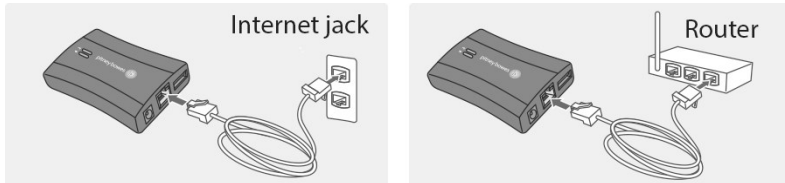
For wireless connection please go to  
[pitneybowes.com/uk/smartlinksetup](http://pitneybowes.com/uk/smartlinksetup)

Do not proceed with the below instructions.

**Please see note above.**

## Wired instructions

1. Connect the SmartLink™ device to either a wall internet port or a router with the included internet cable.



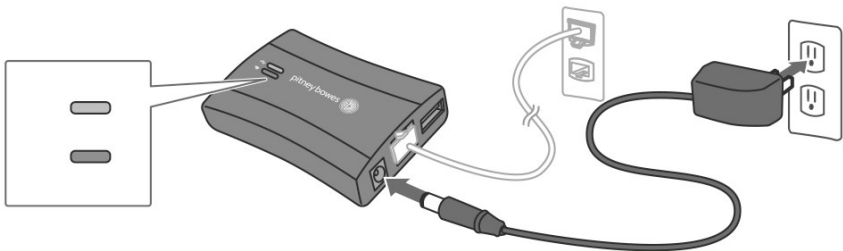
---

### Note:

Lights on the device will remain off.

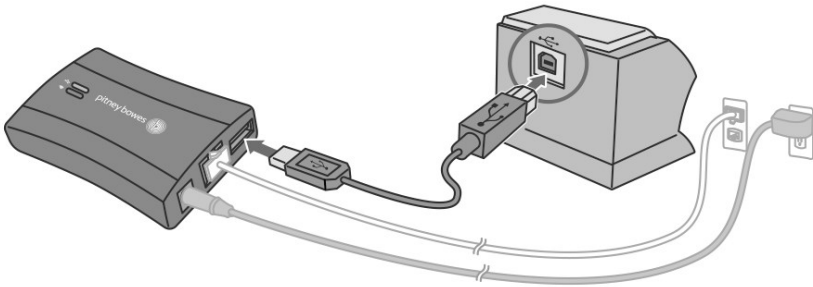
---

2. Plug the power adapter into the SmartLink device. Now connect the power lead to the wall socket.

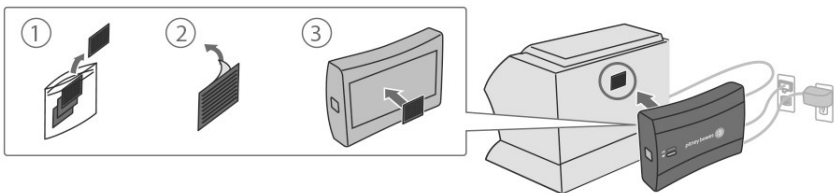


- The SmartLink device's lights will change colour.
- Once the device has connected to the internet the connectivity light will flash green.

- Also the SmartLink's Ethernet port light will show green for successful connection and yellow for network activity.
3. Plug the USB cable into your SmartLink device and into the back of your meter.



- The USB cable is the short cable.
  - The SmartLink device's lights will again change colour.
  - Once a network connection has been established the SmartLink device's USB Connectivity light will turn green and it's Network Connectivity light will blink green.
4. Now connect the power cord to your meter and connect to power.
  5. Attach the SmartLink device to your meter with the included adhesive fastener strips.



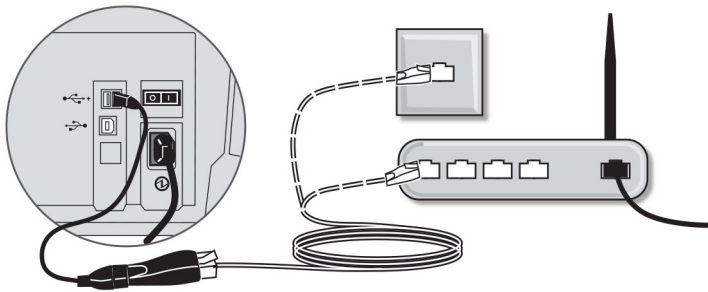


# Connecting your DM300M - DM475M via a wired LAN

To physically connect your system to a LAN, follow the diagrams below.

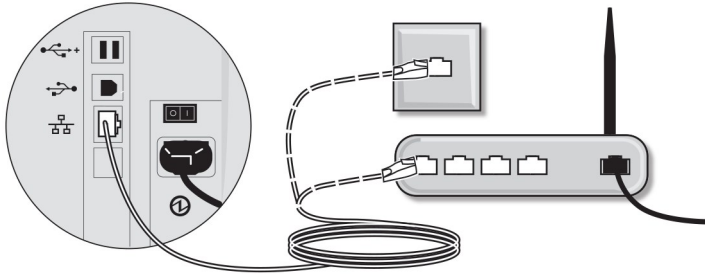
## *DM300M and DM400M*

1. Turn off power to the system.



2. Plug the Ethernet cable into your router or network wall socket.
3. Attach the Network Adapter to the Ethernet cable and then plug the network adapter into one of the USB ports on the meter using the short USB cable that comes with the adapter.
4. Turn the system power back on.

1. Turn off power to the System.



2. Plug the Ethernet cable into your router or network wall socket.
3. Plug the other end of the cable into the LAN port on the rear of the system.
4. Turn the system power back on.

More detailed information on LAN requirements and alternative configurations are given in a guide which you can download. Visit <http://www.pitneybowes.com/uk/support/europe-doc-code-lookup.html>, select the UK flag then select the LAN setup guide (8026).

As a backup and only if you cannot provide a direct connection to your network, you can use the free Pitney Bowes PC Meter Connect™ (PCMC) software to connect via a Windows PC with an internet connection.

# Connecting your DM300M - DM475M via PC Meter Connect™

PC Meter Connect™ (PCMC) software must be installed onto your internet enabled PC. Details of how you can obtain the software are given in the Quick Installation Guide supplied with your system.

As you install PC Meter Connect software, you will be prompted to connect your mailing system to your PC using a USB cable. PC Meter Connect will then test your internet connection and take you through the software installation process.

Once installed there will be a PC Meter Connect™ icon in your PC's system tray. Clicking this icon will give you access to PC Meter Connect's internet settings and language selection.

# Checking funds (Postage) available in your system

1. Press **Funds**.
2. View the funds available.
3. Press **Page Down** for additional information on batch values.
4. Press **Home** to return to Home screen.

---

## Note:

You can continue to check your Postage by Phone balance or add postage by pressing the 'Options' key while in this screen. Refer to 'Checking your Postage by Phone Account' and 'Adding Postage' later in this chapter.

---

# Checking your Postage by Phone® account balance

You can check your Postage by Phone® account balance at any time, as long as your system is connected to a SmartLink device, a LAN (Local Area Network) connection or an Internet enabled PC using Pitney Bowes PC Meter Connect™ (PCMC) software.

1. Press **Refill Postage**.
2. Select "Check PbP balance".
3. The system connects to the Data Centre (this may take a few minutes). Various screens display, letting you know the status of the process.
4. At the Postage by Phone account balances display. Select "Continue" to return to the Home Screen.

---

## Note:

You can elect to refill postage by selecting "Add Postage" on the PbP Balance Screen. Refer to *Refill Postage* in this chapter for more information.

---

# Refill postage

You can add postage to your machine at the times detailed on page 87, as long as you have enough funds in your Postage by Phone account and your system is connected to a SmartLink device, LAN or via PCMC.

1. Press **Refill Postage**.
2. You may select "Add xx" to add the amount shown. Confirm you require the amount by pressing 'Yes'.

---

## Note:

The amount shown in the "Add xx" selection line is the amount of postage you added the last time.

---

OR

Select "Add Another Amount". Key in amount you want to add and select "OK". The amount must be in increments of £50. If you have selected another amount, you will be asked to confirm the new amount. Select "Yes".

3. The system connects to the Data Centre. Various screens display, letting you know the status of the process.
4. The "Transfer Successful" screen displays.
5. You will be asked if you want to print a receipt. Either press "Print Receipt" and follow the prompts or select "Continue" to return to the Home Screen without printing a receipt.

# Secure refill

It is possible to set the machine so that only a supervisor may add postage to the machine. Before a password code can be set, the supervisor password must be turned 'On'. To set a Refill code:

1. Press **Refill Postage**.
2. Select "Refill Code".
3. Enter the "Supervisor Code". You will be asked to key in a Password (4 digits). This becomes the "Refill Code". When selecting Add Postage, the machine will ask for the Refill Password. Enter the 4 digit code you have chosen.

To change or cancel the Refill code:

1. Press **Refill Postage**.
2. Select "Refill Code".
3. Enter the "Supervisor Code". Enter a new code to change the "Refill Code" or leave the code blank to turn the feature off.

# Printing a funds (postage) report

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. Press **Funds**.
2. Press **Options** and select "Print Funds Report".
3. When prompted either:
  - Manually feed an envelope (DM300M): Place the envelope up against the back wall of the system and slide it to the right until the system grasps it.
  - Automatically feed an envelope (DM400M/DM475M): Load envelope onto the feeder and press **Start**.
  - Press the **Tape** key.

The funds report is printed and the envelope/tape is ejected.

4. Select "No" to return to Home screen.



# Downloads from the Data Centre to your system

When you connect to the Data Centre to add postage or perform other transactions, the Data Centre may perform the following:

- Download required software updates to your machine.
- Download Envelope Messaging you ordered.
- Perform a remote audit of your machine as required by the Postal Authority.
- Download new postal rates.

Generally speaking, downloads are considered either mandatory (you must do them at the time you are prompted to on the screen), or non-mandatory (you may decide to download at a later time). However, even non-mandatory downloads can become mandatory if you wait too long to do the download.

Once a download is finished, you will either be prompted to select “Restart Now” to restart the machine or select “Continue” to return you to the screen that you started from, depending on the type of download performed.

A description of the type of downloads that can occur in your machine are presented on the following pages.

## *System Update*

If there has been a feature enhancement or other non-essential update to the software that runs your machine, you will be notified that a system update is available.

## *Envelope Messaging (Advertisements)*

If there are new advertisements that you ordered available, you will be notified that you can perform a download to obtain these.

## *Software Update (mandatory)*

If there has been an important update to the software that runs your machine, you will be notified that a required update is necessary.

## *Postal Inspection (mandatory)*

Your DM300M/DM400M/DM475 series is a Mailmark™ compliant system. At regular intervals defined by Royal Mail, it connects to the Pitney Bowes Data Centre to provide usage data to Royal Mail. The connection will normally happen in the background without you needing to do anything. If the connection was not made for any reason, the display will show 'Data Upload Due' and you should select Connect Now. If, for any reason, a connection has not been made within the 'grace' period allowed by Royal Mail, the display will show 'Data Upload Required' and you MUST make a connection before your franking machine will allow you to continue processing mail.

## *Postal Rate Update (mandatory)*

Postal rates change periodically as defined by your Postal Authority. If new rates are available, you can download them quickly and easily directly from the Data Centre.

The new rates are normally available for download at least 7 days before the effective date. If you connect to the Data Centre and there is time before the effective date, you have a choice whether to download the new rates or not. Once the effective date has been reached (or passed), however, you will have to download the new rates.

The screens on your machine will give you information regarding the status of the rate update and the choices available to you.

When a rate change update takes place it may also affect other presets you have set in your mailing machine. You should check all your presets to insure that they conform to the new rates. See *Chapter 4, Normal and Custom Presets* for instructions on changing preset values.

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.

# Connecting to the Data Centre (other than for postage)

If you need to connect to the Data Centre for purposes other than adding or checking postage, follow these steps.

---

## Note:

The machine must be connected to a SmartLink device, LAN an Internet enabled PC using Pitney Bowes PC Meter Connect (PCMC) software.

---

## *Check for Updates*

Use this feature to connect to the Data Centre for software downloads, new updates etc.

1. Press **Options**.
2. Press **Page Down** if necessary to scroll through the menu.
3. Select "Data Centre Options".
4. Select "Check for Updates".
5. The system connects to the Data Centre. Various screens display, letting you know the status of the process.

6. After connection is made, if a software/postal update or download is available, a message displays.
    - a. If a download is not mandatory, you will be prompted with either "Download Now" or "Skip; Return Home". Select the option desired.
    - b. If a download is mandatory, only "Download Now" displays and you must perform the download.
  7. After the download has completed, a confirmation message displays.
    - a. If you need to restart the system, the prompt "Restart now" displays. Select this to restart the system.
    - b. If no restart is necessary, simply select "Return Home" to return to the Data Centre menu.
- 

**Note:**

When selecting an Envelope Message / Graphic Ad, the menu option "Install an Ad" will be available. Selecting this will cause the system to connect to the Data Centre in exactly the same way as described above.

---

# 6 - System options

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# System options introduction

System options allow you to customise the machine settings for the way you run your mail and add security to those features that are sensitive to your organisation. Because of the many options available, the options are categorised into "Basic", "Scale", "Data Centre" and "Advanced".

## Basic options include:

- Time & Timeouts
- Display Contrast
- Postage Values
- Lock Codes/Passwords
- Configure Tape Button
- Serial Port

Most of the basic system options are accessed by pressing **Options**, then **Setup** and selecting your choice from the menu accessed by using **Page Up** and **Page Down**.

The one exception is Scale settings, which is accessed by pressing the **Weigh/Rate** key.

## Advanced options include:

- Run Install Mode
- Meter Withdrawal

The advanced options are accessed by pressing **Options** and selecting "Advanced Features", which displays a further menu of options.

# Adjusting the contrast

1. Press **Options**.
2. Select "Setup".
3. Select "Display Contrast".
4. Select "Increase Contrast" or "Decrease Contrast" to change the contrast levels as necessary.
5. Press "Continue" to return to the setup menu. Press **Home** to return to the home screen.



# Configuring the tape button

You can specify the action the system takes when the Tape button is pressed.

1. Press **Options**.
2. Select "Setup".
3. Press **Page Down**.
4. Select "Configure Tape Button".
  - If you always want to print one tape at a time, select "Print One Tape".
  - If you want to enter the number of tapes to print, select "Ask For Tape Quantity".

Once you make your selection, the system returns to the Setup Menu. Press **Home** to return to the Home Screen.

# Setting the Timeouts

You set the amount of time your system can remain inactive before reverting to the normal preset values and before reverting to Sleep Mode. Also, on the DM400M/DM475M only, you can set the Wait for Envelope Time.

## *Setting the Normal Preset Timer*

The normal preset is a set of values (postage, graphic Ad, account and so on) that your machine display automatically returns to after a set period of time. You can set the amount of time the display takes before it reverts to the normal preset.

1. Press **Options**.
2. Select "Setup".
3. Select "Time and Timeouts".
4. Select "Normal Preset Timeout".
5. Key in the amount of minutes (from 1-240) before the system returns to the normal preset.
6. Select "OK". The display returns to Time and Timeouts menu.
7. Press **Home** to return to the home screen.

# Setting 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 awaken the machine by pressing any button on the control panel.

1. Press **Options**.
2. Select "Setup".
3. Select "Time and Timeouts".
4. Select "Sleep Mode Timeout".
5. Key in the amount of minutes (from 1-240) before the system goes into sleep mode.
6. Select "OK". The display returns to Time and Timeouts menu.
7. Press **Home** to return to the home screen.

# Setting wait for envelope (DM400 / DM475M)

Once all mail has left the feed deck, the machine runs for a few seconds waiting for more mail to be added. If no mail is added, the machine resets itself and **Start** has to be pressed to restart the machine.

Using this setting adds a delay which allows the machine to automatically restart when mail is placed on the feed deck.

1. Press **Options**.
2. Select "Setup".
3. Select "Time and Timeouts".
4. Select "Wait for Envelope".
5. Key in the amount of seconds (from 0 to 180) before the system stops.
6. Select "OK". The display returns to Time and Timeouts menu.
7. Press **Home** to return to the home screen.

# Setting the low funds warning

You can set up the system so that when the postage remaining reaches a certain level, the system will remind you to add postage.

1. Press **Options**.
2. Select "Setup".
3. Select "Postage Limits".
4. Select "Low Funds".
5. Press the **C** key.
6. Key in the amount you want. Select "OK".
7. Press **Home** to return to the home screen.

# Setting the Lock Code

The lock code prevents unauthorised access to your mailing system after the machine has entered sleep mode or it is in a "soft" power-down mode (by pressing the Lock/Power key on upper left corner of the control panel).

---

## IMPORTANT INFORMATION:

Your DM300M / DM400M / DM475M mailing machine contains postal funds and if you opt to use the 4-digit numeric lock code to secure the funds, it is important that you do not allow your lock code to be compromised if the machine is used in an open area. If you believe your lock code has been compromised, it should be changed immediately. Alternatively, you may wish to consider locking the machine in a secure area.

---

---

## Note:

The password 0000 cannot be used, as this turns off the password feature.

---

1. Press **Options**.
2. Select "Setup".
3. Select "LockCode/Password".
4. Select "Enable Lock Code".

5. At the prompt, type in a new numeric lock code (4 digits) and select "OK".
6. Re-enter the new numeric lock code again to confirm and select "OK".
7. At the "Lock Code enabled" message, select "OK".
8. Press **Home** to return to the home screen.

# Disabling the lock code

1. Press **Options**.
2. Select "Setup".
3. Select "LockCode/Password".
4. Select "Disable Lock Code".
5. When prompted, enter the current numeric Lock Code and select "OK".
6. Press **Home** to return to the home menu.



# Changing the lock code

You can change the Lock Code if it has been enabled.

1. Press **Options**.
2. Select "Setup".
3. Select "LockCode/Password".
4. Select "Change Lock Code".
5. At the prompt, type in the current numeric lock code (4 digits) and select "OK".
6. At the prompt, type in a new numeric Lock Code (4 digits) and select "OK".
7. Re-enter the new lock code again to confirm and select "OK".
8. At the "Lock Code enabled" message, select "OK".
9. Press **Home** to return to the home screen.

# Setting / Disabling the supervisor password

The supervisor password prevents access to sensitive setup procedures.

1. Press **Options**.
2. Select "Setup".
3. Select "LockCode/Password".
4. Select either "Enable Password", "Disable Password" or "Change Password" as required.
5. If there is an existing Supervisor Password, you are prompted to key in the 4-digit numeric code, then select "OK".
6. If you are creating or changing the password, key in the new 4-digit numeric code that you require.
7. Re-enter the new lock code again to confirm and select "OK".
8. Enter the new numeric code again to confirm, then press "OK". The machine will confirm that the new password has been enabled.
9. At the "Password Enabled" message, select "OK".
10. Press **Home** to return to the home screen.

# Setting 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, WOW operation and selecting weight change options.

## *Serial Port*

This must be set to “Attached Scale”. DO NOT select “External Accounting”.

# Zero the scale

Make sure the scale platform is empty before you zero the scale.

1. Press **Weigh/Rate** or press **Options** and select "Weigh/Rate".
2. Select "Zero the Scale".
3. The scale will zero the weight and return to the Home screen.

# Turning the Auto scale on or off

You may turn the scale's auto rating function on or off as necessary.

1. Press **Weigh/Rate**, then select **Page Down** twice.
2. Select "Turn Auto Scale (OFF or ON)".
  - If the scale is ON, you will be prompted to "Turn Auto Scale OFF" or "Keep it turned ON". Select the appropriate option.
  - If the scale is OFF, you will be prompted to "Turn Auto Scale ON" or "Keep it turned OFF". Select the appropriate option.
3. Depending on the changes you make, the system will do one of the following:
  - If you elect to turn the scale on or off, you return to the Home screen with either the scale on or off.
  - If you elect to keep the scale in its current mode, you return to the Weight/Rate menu.

# Setting weight change options

You can set how the scale reacts regarding the class of service when the weight changes.

1. Press **Weigh/Rate**.
2. Press **Page Down**.
3. Select "Change/Retain Class".
4. Select "Retain Class" when weight changes. The current condition is displayed on the screen.
5. Toggle "Yes" if you want the system to retain the class when the weight changes. Toggle "No" if you do not want the system to retain the class when the weight changes.
6. Press **Enter** to return to the Home screen.

# Current WOW weight limit (DM475M only)

You may set the maximum limit to the WOW weight capacity. This will stop the WOW from weighing items above the set weight.

1. Press **Weigh/Rate**, then select **Page Down** three times.
2. Select 'WOW Wt Limit'.
3. Enter the maximum weight and select 'Confirm'.

To revert to the maximum weight, select 'Return to Maximum'.

# WOW start key options (DM475M only)

This sets the action the machine takes if a WOW operation is interrupted for a scale operation during use.

1. Press **Weigh/Rate**, then select **Page Down** three times.
2. Select 'WOW Start Key: Re-WOW'.
3. Select 'Revert to WOW', if you require the machine to continue with WOW operation OR select 'Keep Current Scale Mode'.



# Setting scale location code

You may set the maximum limit to the WOW weight capacity. This will stop the WOW from weighing items above the set weight.

1. Press **Weigh/Rate**.
2. Press **Page Down** three times.
3. Select "Scale Location Code".
4. Enter the location code (from 1 - 31) and select "OK". Refer to the Self Install Guide supplied with your system to determine the location code for your scale/location.
5. Press **Home** to return to the Home screen.

# Connecting to the Data Centre

You can modify the connection settings on your machine. The Data Centre menu choices are:

- Check for Updates
- Network Settings
- Distributor Settings

---

## CAUTION:

Changing these settings can affect the ability of your machine to contact the Data Centre. A member of your network support may need to change these settings.

---

## *Check for Updates*

Use this feature to connect to the Data Centre for software downloads, new updates, etc. See also Chapter 5, Adding Postage/Connecting to Data Centre for more information on this feature.

1. Press **Options**.
2. Select **Page Down** twice.
3. Select "Data Centre Options".
4. Select "Check for Updates". The system automatically connects to the centre.

---

Note:

Make sure the machine is connected to a SmartLink device, LAN or via PCMC

---

5. After connection is made, if a software, postal update or download is available, a message displays to inform you.
  - a. If a download is not mandatory, you will be prompted with either “Download Now” or “Skip, Return Home”. Select your preference.
  - b. If a download is mandatory, on “Download Now” displays. Select this to restart the system.
6. After the download has completed, a message stating so displays..
7. If you need to reboot the system, the prompt “Restart Now” displays If no rebooting is necessary select “Return Home” to return to the home screen.

# Distributor settings

This option allows you to modify the phone connection parameters that your machine uses to call to the Data Centre. A brief description of each parameter is provided on the next page.

---

## CAUTION:

Changing these settings can affect the ability of your machine to contact the Data Centre. A member of your network support may need to change these settings.

---

1. Press **Options**.
2. Press **Page Down**, if necessary.
3. Select "Data Centre Options".
4. Select "Distributor Settings".
5. Select the parameter you want to modify from the list appearing in the display. Use **Page Down** if needed to access your choice.
6. A warning message displays that reminds you that entering a wrong value may result in errors connecting to the Data Centre. If you want to continue, press "Continue"; otherwise, press the **C** key.
7. Key in a new entry for that parameter (some entries may require alpha-numeric characters).
  - To modify the existing parameter, select "Edit Options". You can then scroll left or right to insert a character within the existing string. Select "Enter" when done.
  - To restore default settings, select "Restore Defaults".

8. When finished, either select "Restore Default" (if you made a mistake or changed your mind) or "OK" (if you are satisfied with your new entry).
9. If you have changed a parameter, a message confirming the new setting displays.
10. Select "OK" when done.
11. Press **Home** to return to the home screen.

## *Parameter Descriptions*

### **Account and User ID**

This is the account number and the user ID that your system uses to dial into the internet service provider (ISP) that allows you to connect to the Data Centre.

### **Global Password**

This is the password your system uses to dial into your internet service provider.

### **ANI/LCZ Server IP**

This is the internet address of the Automatic Number Identification (ANI) / Least Cost Zone (LCZ) server that identifies your system and routes your call to a zone that ensures the lowest cost for the connection.

### **ANI/LCZ Server Port**

The server port number identifies the port number on the ANI/LCZ server to which your system connects on dial-up.

### **Primary DNS Server**

This is the internet address of the primary domain name server (DNS). The domain name server converts your system name to its IP address.

## **Secondary DNS Server**

This is the internet address of the secondary domain name server (DNS).

## **Distributor URL**

The Universal Resource Locator, URL, is the web page to which your system connects during dial-up.

# Network settings

This function is used to set the internet configuration required for the system is being connected via a LAN.

More detailed information on LAN requirements and alternative configurations are given in a guide which you can download. Visit <http://www.pitneybowes.com/uk/support/europe-doc-code-lookup.html>, select the UK flag then select the LAN setup guide (8026).

## *Firewall Settings*

This function gives control of some firewall settings that may be required if the system is being connected via a LAN.

These settings will not normally require any changes. They should only be changed in consultation with your machine supplier and your own network administrator.

## *Connection Mode*

This function is used to set the way your system connects to Pitney Bowes services.

This setting should remain set to Auto.

## *Advanced Options*

Advanced options allow you access to features that are used very infrequently such as meter withdrawal, etc. The Advanced Feature menu includes:

- Run Install Mode
- Meter Withdrawal (for withdrawing postage funds)

## *Run Install Mode*

This function can be used to reset machine functions.

It should only be used under direct instructions of your machine supplier.

## *Meter Withdrawal (Withdrawing Postage Funds)*

This function is used to withdraw your machine from use.

It should only be used under direct instruction of your machine supplier.



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# 7 - Maintenance

## In this section

Replacing the Ink Cartridge/Printhead	139
Filling the moistener (DM400M / DM475M)	146
Filling the moistener (DM300M only)	148
Maintaining the Moistener (DM400M / DM475M)	149
Maintaining the moistener (DM300M)	153
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Cleaning the printer nozzles (Purging)	160

# Replacing the Ink Cartridge/Printhead

All supplies, accessories and options are available from your machine supplier. Contact details are given in the separate 'Contacts' document supplied with your machine.

---

## IMPORTANT INFORMATION:

Pitney Bowes recommends that you only use genuine replacement blue ink cartridges that are available from Pitney Bowes. Pitney Bowes ink cartridges have been checked and comply with Royal Mail readability requirements. If alternative cartridges or refills are obtained, the ink used must be approved by Royal Mail.

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Ink usage will vary, depending on whether you routinely print ads, how many pieces of mail you print a day and other factors. We recommend that you keep a spare ink cartridge on hand at all times.

The machine display tells you when the ink supply is low or exhausted:

"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. See *Chapter 9, Supplies and Options* for instructions.

---

## CAUTION:

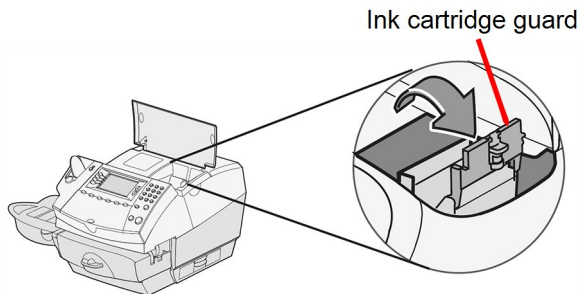
Replace the ink cartridge as soon as you see the "Low Ink" alert.

---

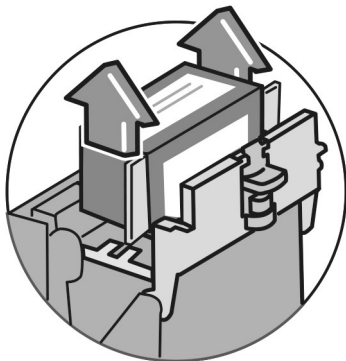
### "Ink Out"

Replace the ink cartridge immediately. The ink supply has finished; you won't be able to print.

1. If you have received an ink warning, skip to step 2. Alternatively you can navigate through the menus to perform the replacement procedure.
  - a. Press **Options**.
  - b. If necessary, Press **Page Down** and select "Maintenance".
  - c. Select "Printer Maintenance".
  - d. Select "Replace Ink Cartridge" or "Replace Print Head" as required.
2. When prompted, remove the weighing platform and open the ink access cover. A "Moving Ink Cartridge" message displays.
3. When prompted to "Install Now", unlatch and flip open the ink cartridge guard.



4. Remove the old ink cartridge.



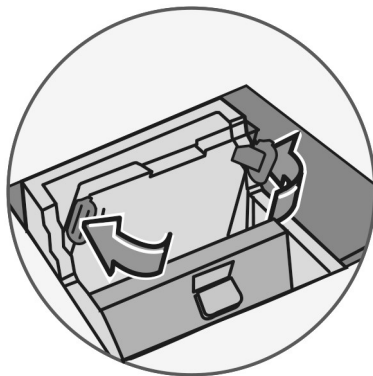
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**Note:**

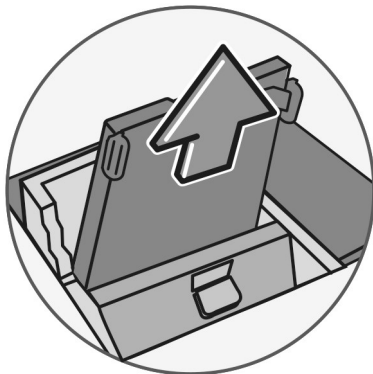
If you are NOT changing the printhead, skip to Step 11. If you have been directed by a representative of your machine supplier to change the Print Head, continue with step 5 below.

---

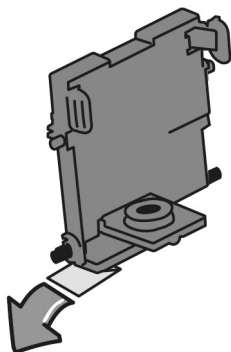
5. Squeeze the two grey tabs on either side of the printhead.



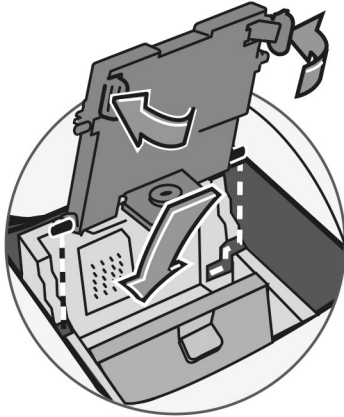
6. While squeezing, lift and tilt to the right the printhead. The printhead should come up out of the machine.



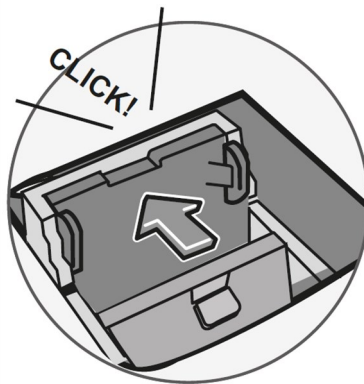
7. Remove the protective tape from the bottom of the new printhead.



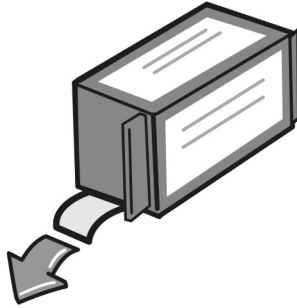
8. Squeeze the two grey tabs on either side of the new printhead and slightly angle the printhead while sliding it back into its holder.



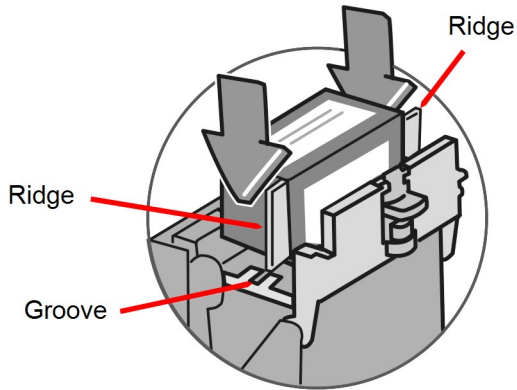
9. Push the printhead back into place. You should hear a click when it is seated correctly.



10. Replace the ink cartridge. Follow step 11 onwards in this chapter for more information.
11. Remove the tape from the bottom of the new ink cartridge.



12. Lower the ink cartridge into the cavity. The ridges on either side of the cartridge will slide into the grooves.

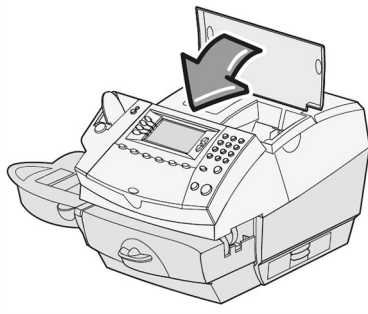




13. Rotate the guard back to the closed position.

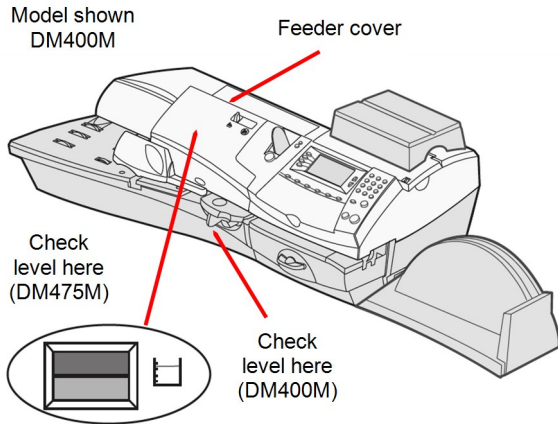


14. Close the ink access cover. The system automatically recognises the new cartridge and in a few moments returns you to the Home screen. Refit the weighing platform if it was removed previously.

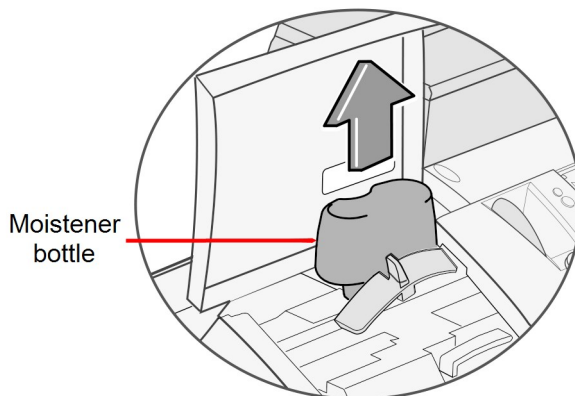


# Filling the moistener (DM400M / DM475M)

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



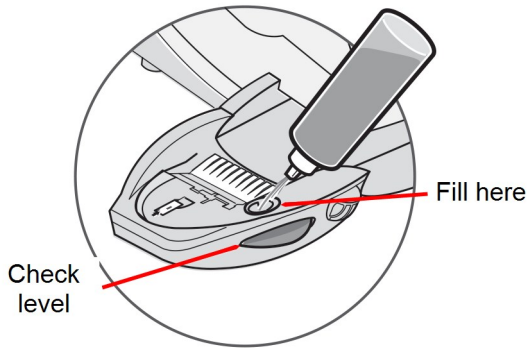
2. Open the feeder cover and remove the moistener bottle.



3. Remove the moistener bottle cap and fill the moistener bottle with sealing solution or water. We recommend sealing solution because it helps keep your moistener clean and improves sealing efficiency.
4. Replace the moistener bottle cap and place the bottle back in its original location.
5. If the tank was empty, allow 30 minutes for the moistener brush and wick to get completely wet.
6. Close the feeder cover.

# Filling the moistener (DM300M only)

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



2. Add enough sealing solution or water to bring the sealant level up to the bottom of the fill hole. We recommend sealing solution because it helps keep your moistener clean and improves sealing efficiency.
3. If the tank was empty, allow 30 minutes for the moistener brush and wick to get completely wet.

---

## CAUTION:

Don't overfill the moistener tank.

---

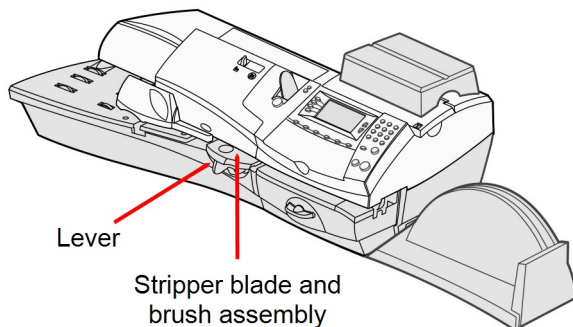
# Maintaining the Moistener (DM400M / DM475M)

## *Maintaining the Moistener*

If you notice incomplete or poor sealing and the moistener tank is full, you may need to clean the moistener brush or wick. If the seal quality doesn't improve after cleaning you can replace the stripper blade and brush assembly or wick as needed. See *Chapter 9, Supplies and Options* for instructions on ordering these supplies for your machine.

## *Cleaning the Stripper Blade and Brush Assembly*

1. Push the lever up, on the stripper blade and brush assembly or press the button on the top of the DM475M.
2. Whilst holding the lever up, grasp the assembly and pull it straight out towards you.



3. Clean the moistener brush by running it under plain water.

---

**Note:**

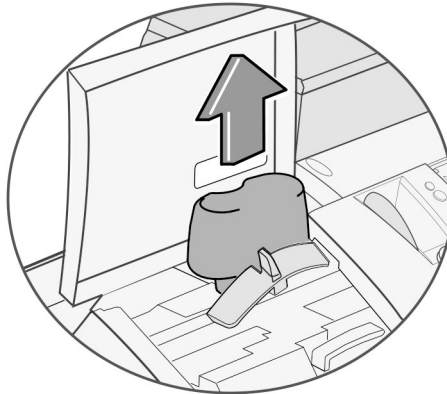
If the assembly cannot be cleaned thoroughly, then it should be replaced.

---

4. If you need to clean the wick and shield, continue with *Cleaning the Shield and Wick* below. Otherwise, push up on the release lever on the stripper blade and brush assembly.
5. Slide the assembly back onto the machine. You should hear a click as it engages.

### *Cleaning the Shield and Wick*

1. Open the feeder cover and remove the moistener bottle. Leave the moistener bottle out until instructed to replace it.



2. Remove the stripper blade and brush assembly.
3. Pull the moistener tank straight out towards you. Gently lift the tank up and out.

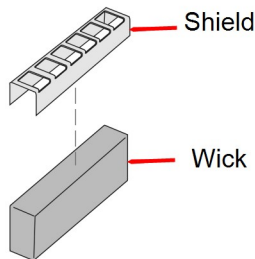
---

## IMPORTANT:

The moistener tank may be full of sealing solution. If so, you can pour the solution back into the moistener bottle, or drain the tank into a receptacle.

---

4. Pull up and remove the shield and wick from the moistener tank.
5. Separate wick from the shield. Clean the wick in plain water, and rinse thoroughly.



---

## Note:

If the wick and shield cannot be cleaned thoroughly, they will need to be replaced.

---

6. Place the wick back into the shield.
7. Push the wick and shield back into moistener tank.
8. Slide the tank back in place.

9. Replace the stripper blade and brush assembly by pushing up on the release lever and sliding the assembly back on its track until it snaps into position.
10. Replace the moistener bottle and close the feeder cover.



# Maintaining the moistener (DM300M)

If you notice incomplete or poor sealing and the moistener tank is full, you may need to clean the moistener brush or wick. If seal quality doesn't improve after cleaning, you can replace the moistener brush or wick as needed. See *Chapter 9, Supplies and Options* for instructions on ordering these supplies for your machine.

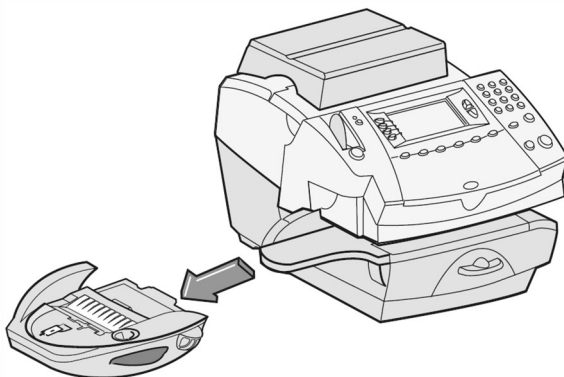
## Removing the Moistener

1. Push down on the blue release lever on the moistener.



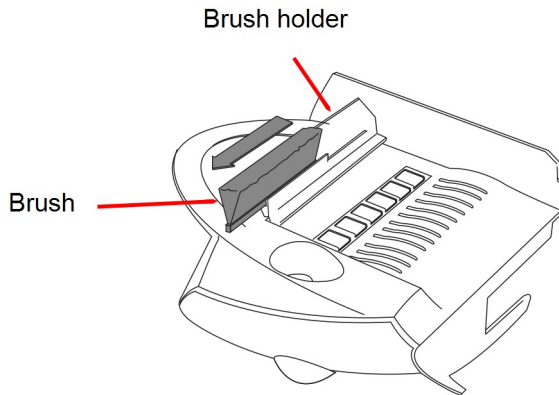
Release lever

2. Pull the moistener straight out to the left.

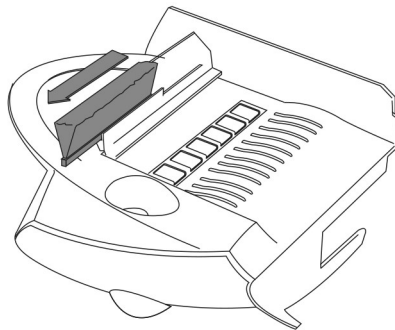


## Removing the Moistener Brush

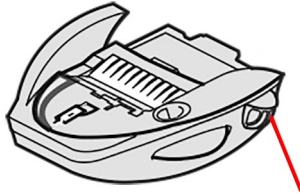
1. Remove the moistener as described above.
2. Open the hinged brush holder.
3. Grasp the bristles and slide the brush out of the hinged brush holder, towards the front of the moistener tank.



4. Clean the brush in plain water, and rinse thoroughly.
5. Position the brush as shown so its bottom edge is under the mounting tabs.

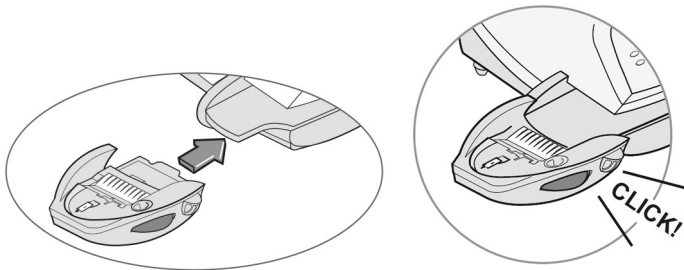


6. Slide the brush back towards the rear of the moistener.
7. If you need to clean the wick and holder, continue with Removing the Holder and Wick procedure on the next page. Otherwise, push down on the blue release lever on the moistener.



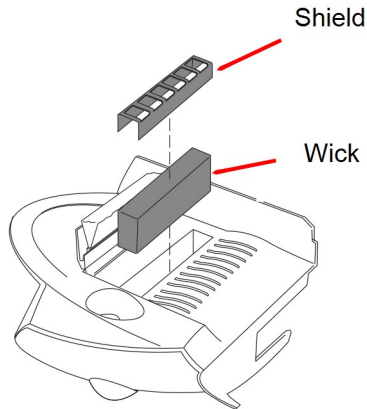
Release lever

8. Slide the moistener back onto the machine. You should hear a click as it engages.

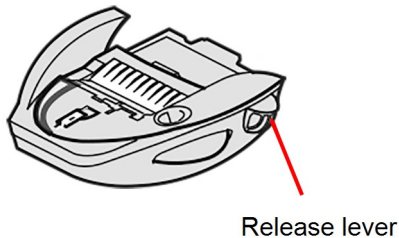


## Removing the Shield and Wick

1. Remove the moistener as described on page 149.
2. Pull up and remove the shield and wick from the moistener tank.

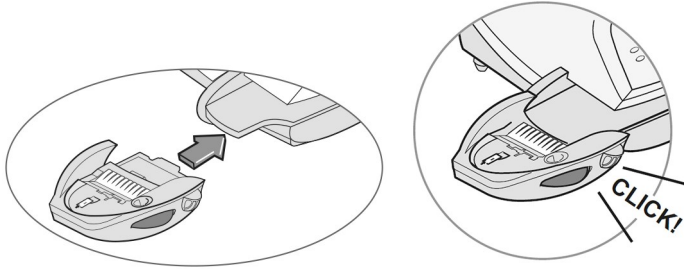


3. Separate the wick from the shield. Clean the wick in plain water, and rinse thoroughly.
4. Place the wick back into the shield.
5. Reinstall the wick and holder assembly into the moistener.
6. Reinstall the moistener. Push down on the blue release lever on the moistener.



## Reinstall the Moistener Tank

1. Line up the yellow tab with the yellow slot.
2. Slide the moistener tank into position on the mailing machine base until the release lever snaps into position.



3. Resume operation.

# Running print tests

The system has several tests that let you check print performance and help you determine printing problems:

## *Test Print*

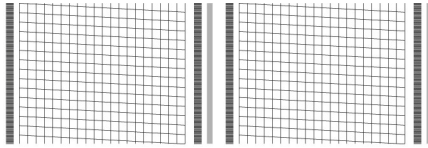
The test print allows you to print a test pattern to see if the printhead is functioning properly and has no blocked printing jets.

Always ensure that your prints are clear and complete. Poor prints may be rejected by your Postal Authority. If you notice missing lines in the print, perform a purge as described on the following page.

1. Press **Options**.
2. Press **Page Down**.
3. Select "Maintenance".
4. Select "Printer Maintenance".
5. Select "Print Test Pattern".
6. Follow the prompts to print the test pattern on an envelope or tape strip.

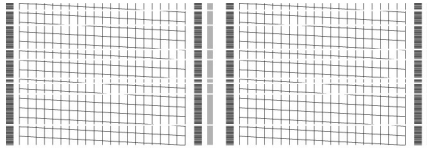
7. You are asked if the test pattern is OK.

a. If yes, Select "yes" and you return to the Home Screen.



Good test print  
(No missing lines)

b. If no, select "No, Clean Nozzle" and the system executes a purge. This may take a few moments. When finished, you return to the Maintenance Complete menu. Select "Continue" to return to the Printer Maintenance menu.



Poor test print  
(Missing lines)

8. Press **Home** to return to the home screen.

# Cleaning the printer nozzles (Purging)

This function allows you to purge the printheads in an effort to fix a printing problem.

---

## IMPORTANT:

Always ensure that your prints are clear and complete. Poor prints may be rejected by your Postal Authority. If you notice missing lines in the print as shown in the illustration, perform a printhead purge as described below.



The indicia above is a black and white representation of the approved Blue indicia. Only Blue Non-Fluorescent approved ink should be used in the machine.

- 
1. Press **Options**.
  2. Press **Page Down**.
  3. Select "Maintenance".
  4. Select "Printer Maintenance".
  5. Select "Clean Printer Nozzle".



6. You have a choice of 4 purges to use. Normally selecting "Purge A" is sufficient to purge the system, unless directed by a representative of your machine supplier to do otherwise.
7. The system executes a purge. This may take a few moments. When finished, the Maintenance Complete menu displays.
  - Select "Print Test Pattern" to print a test pattern. See printing a Test Pattern in this chapter.
  - Select "Select another purge" to choose a different purge.
  - Select "Continue" to return to the Printer Maintenance menu.
8. Press **Home** to return to the home screen.

# 8 - Troubleshooting

## In this section

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# Getting help

There may be times when you need help to solve a problem, or you may want more information about how your DM300M / DM400M / DM475M Series works. Please read the troubleshooting information in this section first. In many cases, it can help you resolve the problem.

If you need to contact us, please have the following information at hand:

- Product model: DM300M / DM400M / DM475M Series.
- Serial number: See the back of the DM300M / DM400M / DM475M Series.
- Nature of problem: What happens and when does it happen? Did the DM300M / DM400M / DM475M Series display an error message?
- The steps you've already taken to solve the problem and the results.

Details of how to contact your machine supplier will be either in a separate document supplied with your DM300M / DM400M / DM475M Series, on the back cover of this guide, or on a sticker applied to your DM300M / DM400M / DM475M Series.

---

## IMPORTANT INFORMATION:

The DM300M / DM400M / DM475M Series has been approved for use in the UK by Royal Mail. Under the terms of your licence you are not allowed to tamper with or modify the machine in any way.

---

# Power problems (nothing displays)

1. Is the power cord plugged into both the meter and the wall outlet?  
Make sure the power cord is not connected to a switched wall outlet with the outlet turned off.
2. Check the power switch is on.
3. Check the power lamp on the machine. If it is on, power is reaching the machine.
4. The meter may be in sleep mode. Press any key to wake it.

# Error messages

From time-to-time your DM300M / DM400M / DM475M Series may display an alert or error message. An alert tells you that something needs attention; an error message usually tells you about a DM300M / DM400M / DM475M Series condition you can fix.

Message	Description	Action
Account Balance Low	Refill amount exceeds funds available or credit limit.	Perform refill procedures for a smaller amount, make an advance payment or call your machine supplier for credit.
Cannot Reach Data Centre	Trouble getting a connection to the Data Centre.	See Connection problems on pages 172 - 176
Connection Lost	Connection made but lost before transaction completed.	See Connection problems on page 172 - 176
Data Upload Due/Required	Periodically your system must connect to the Data Centre to provide usage data to Royal Mail. These messages remind you that a connection is due. If 'Data Upload Required' appears, you <b>MUST</b> connect to the Data Centre before you can use the machine.	Connect to the Data Centre to perform the audit.

Message	Description	Action
Not Enough Funds	Insufficient funds in your DM300M / DM400M / DM475M Series. Postage amount selected exceeds maximum funds available in meter.	Select a lower postage amount. Perform a funds refill to add funds to the DM300M / DM400M / DM475M Series.
Refill Too High	Refill amount entered is more than the maximum DM300M / DM400M / DM475M Series will allow.	Press <b>Clear/Back</b> . Repeat the refill procedure with a smaller refill amount.

If you encounter an error that has no accompanying message (such as "1103", "2215", etc.), press **Clear / Back**. If nothing happens in 5 seconds, turn off machine; wait 15 seconds, and then turn on machine. If the problem persists, call your machine supplier.

# Printing problems

## *Machine won't print*

Machine is in seal-only mode. This mode disables printing. Press Home to return to the Home screen and resume printing.

## *Digital meter stamp is incomplete or streaked; poor print quality*

Print nozzles clogged

---

### IMPORTANT:

Always ensure that your prints are clear and complete. Poor prints may be rejected by your Postal Authority. If you notice missing lines in the print as shown in the illustration, perform a printhead purge as described on page 156 of this guide.



**The indicia above is a black and white representation of the approved Blue indicia. Only Blue Non-Fluorescent approved ink should be used in the machine.**

---

The print nozzles may be clogged. Perform a print purge in an effort to fix the problem see *Chapter 7, Maintenance*.

If printer maintenance fails to correct the problem, call your machine supplier. You may have to replace the printhead.

# Feeding problems

## *To avoid stalled (jammed) envelopes*

1. Make sure your envelopes meet our published specifications. See *Chapter 1, Introduction*.
2. Feed envelopes correctly. See the instructions in *Chapter 3, Running Mail*. Don't try to feed oversize envelopes through the machine. Use tape strips instead.

## *Clearing a stalled envelope*

1. Rotate clearance lever clockwise to the "released" position.
2. Carefully pull the envelope out from the right.

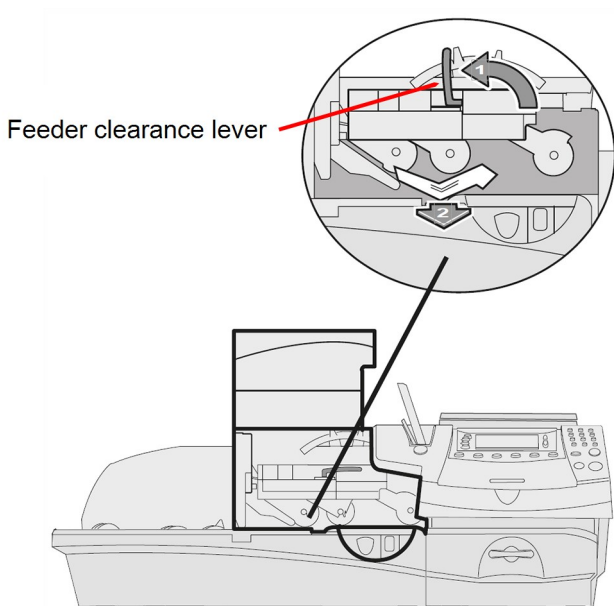


3. Make sure the deck is clear of paper fragments.
4. Rotate the clearance lever anticlockwise to the "home" position.

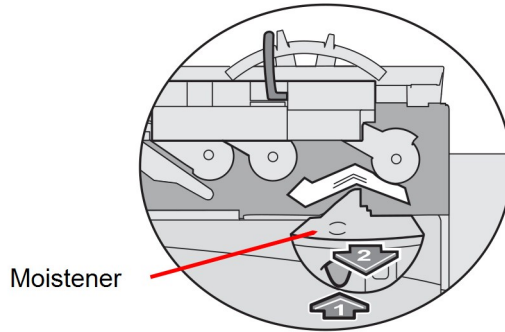


# Clearing a stalled envelope - Feeder area (DM400M Only)

1. Raise the Feeder cover.
2. Raise the moistener clearance lever two clicks to the fully upright position remove mail under the feeder rollers.

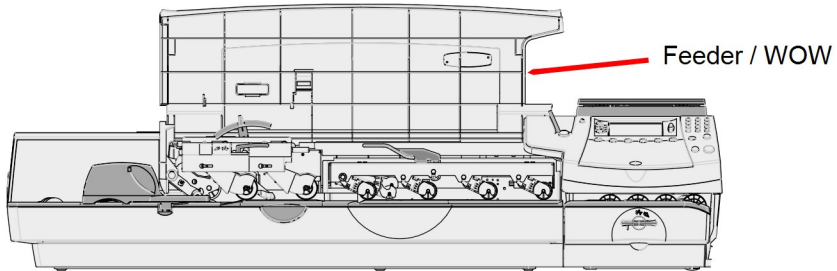


3. If necessary, remove moistener assembly to clear mail between the feeder and the printer area.

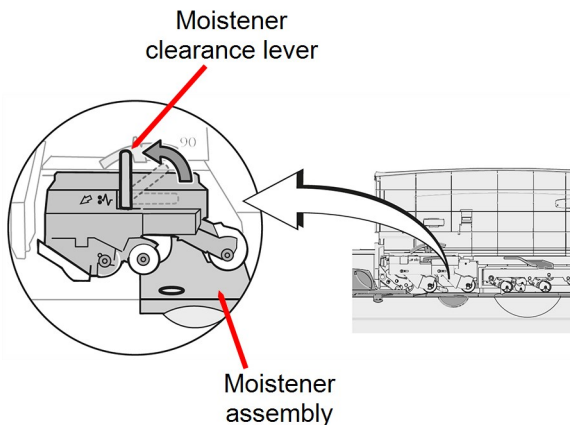


# Clearing a stalled envelope - Feeder/WOW area (DM475M only)

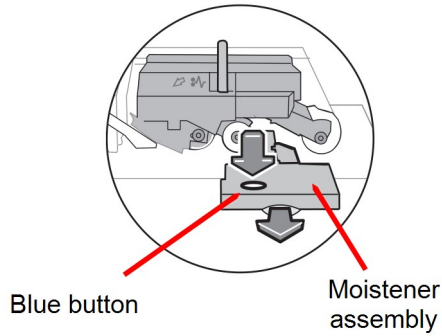
1. Open the Feeder / WOW cover.



2. Raise the moistener clearance lever two clicks to the fully upright position remove mail under the feeder rollers.



3. If necessary to gain access to the material, push down on the blue button and slide the moistener assembly out of the deck.



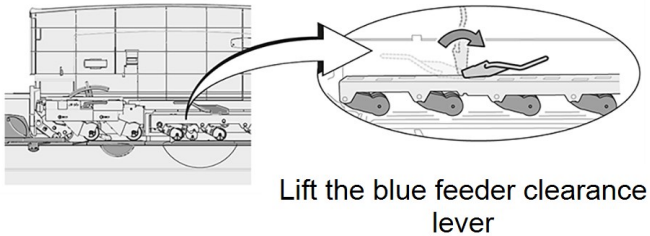
---

**IMPORTANT:**

Do not remove mail without lifting the clearance lever.

---

4. Raise the Feeder / WOW clearance lever.



5. Lower all levers and close the Feeder / WOW cover.

# SmartLink connection problems

Are you seeing problems like shown below whilst using the SmartLink device?

- The SmartLink device's network LED is not blinking green.
- The lights are correct, but the meter attempts to dial out and shows error No dial tone.

You may be able to resolve the problem by restarting your SmartLink device and meter.

1. Power down the meter by removing the power cable from the back of the machine.
2. Power down the SmartLink device by removing the power cable from the back of the box.
3. Remove the USB cable from the back of the meter.
4. Power up the meter by plugging the power cable into the back of the machine.
5. Power up the SmartLink device. After a few seconds, if the device finds an active connection, the bottom internet light will start blinking green:



6. Plug the USB cable into the SmartLink and into the back of your meter.

7. The device's lights will change colour. The USB light will show steady green and the internet light will be blinking green:



8. The meter should display the message Meter Controlled by PC. This indicates that the meter is able to make a connection to Pitney Bowes.

# LAN (network) connection problems

- Check that PC's on your network can access the internet.
- Check you have either the 10 or 100 indicator on the network adapter lit and the ACT indicator may flash. If no indicators are lit, check the network cable and network connection socket or router.
- If you're unsure about the requirements for LAN connection, our online LAN guide can help. Visit **<http://www.pitneybowes.com/uk/support/europe-doc-code-lookup.html>**, select your countries flag then select the LAN setup guide (8026).

# PC Meter Connect™ connection problems

Are you seeing problems like shown below whilst using the PC Meter Connect?

- Meter not detected.
  - Internet not detected.
1. Ensure that the meter is fully booted up.
  2. Ensure that the USB cable's flat end is plugged into the computer, the square end into the meter.
  3. Try connecting the USB cable to a different USB port on your computer.
  4. Try a different USB cable.

The PC Meter Connect program runs in the background on your computer. If it is left running for a long period of time, the program can become unresponsive when the meter is connected. A simple relaunch of the application can often resolve this issue

1. Check if the PC Meter Connect program is running by either double clicking on the desktop icon or press the Start button and type **PC Meter Connect**.
2. If you see a message saying "PC Meter Connect Already Running", press **OK**.



3. You can find the PC Meter Connect icon in the bottom right-hand corner of the computer, near the clock. It is often hidden, click the up triangle on the taskbar.
  - a. When a meter is connected, the icon is an orange arrow.
  - b. When meter is not connected, the icon is a red cross. When you hover the mouse cursor over the icon it says "Meter not detected by PC" or "Internet Not Detected".
4. Exit the program by right-clicking the icon and left-clicking **Exit**.
5. Reopen the program (from the desktop icon, or via Start and search "**PC Meter Connect**").
6. Plug the flat end of the USB cable into a USB port on the computer, then plug the square end into the back of the meter.
7. The computer should immediately show a pop-up box, saying "Meter detected". This means the meter has been recognised, and you can proceed with attempting a connection on the meter.

# Moistening problems

## *Envelopes not sealing*

This can be caused by incorrect feeding of envelopes. Make sure you slide the envelope flap under the blue edge of the feed deck. If you don't, the moistener can't wet the flap.

## *Low sealant level*

Check the sight glass on the left side of the moistener tank. If the sealant level is low, add sealing solution until it reaches the bottom of the fill hole. See the instructions in *Chapter 7, Maintenance*.

## *Dry moistener brush*

Try wetting the moistener brush. If the brush dries out quickly, clean the moistener wick as explained in *Chapter 7, Maintenance*.

## *Dirty moistener brush*

Remove the moistener brush. Clean it in plain water and rinse thoroughly (see *Chapter 7, Maintenance*).

## *Worn moistener brush*

Replace the moistener brush (see *Chapter 7, Maintenance*).

To order any of these supplies, refer to *Chapter 9, Supplies and Options*.

# Viewing system configuration levels

Sometimes in an effort to fix your problem over the phone, the representative of your machine supplier may request you to look up the software and firmware level that is on your machine. Follow these steps to do this:

1. Press **Options**.
2. Press **Page Down** if necessary.
3. Select "Maintenance".
4. Select "View System Info".
5. There are multiple screens of information available about your machine. Press **Page Down** to scroll through all the screens if needed.
6. Press **Home** to return to the Home screen.

# 9 - Supplies and options

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# Options

A number of flexible options are available so you can tailor your mailing system to meet your exact needs today, and expand it as your business grows tomorrow. Contact your machine supplier who will advise you about the options available on your model.

## *Weighing Platforms*

The weighing platform allows you to accurately weigh mail and packages. You have a choice of different capacity weighing platforms. See *Chapter 3, Running Mail* for details on using the weighing platform.

## *Moistener*

The moistener applies sealing solution to the envelope flap. You can seal envelopes or leave them unsealed, depending on how you feed them. See *Chapter 3, Running Mail* for details.

## *Envelope Messaging (Ads)*

Your system may come pre-loaded with envelope messaging. Envelope Messages give your mail a professional appearance and can turn your mailings into a powerful promotional tool. You can purchase additional Envelope Messages if your needs require it.

Optional Envelope Messages are conveniently loaded into your machine over the telephone line via software downloads.

## *Departmental Accounting*

The optional accounting feature tracks postage costs for departmental accounts. See *Chapter 11, Departmental (Standard) Accounting* for details.

# How to order

All supplies, accessories and options are available from your machine supplier.

Contact details are given on a separate document supplied with your DM300M / DM400M / DM475M Series, on the rear page of this guide and/or on a 'sticker' applied to the machine.

## *Supplies*

Your DM300M/DM400M Series requires certain supplies to function properly. These include:

- Ink Cartridges
- Tape sheets / strips (dependant on model)
- Sealing Solution (to seal envelope flaps after processing)

---

### IMPORTANT:

Pitney Bowes recommends that you only use genuine replacement ink cartridges that are available from Pitney Bowes.

If alternative cartridges or refills are obtained, **the ink used must be approved by your Postal Authority.**

---

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# 10 - Reports

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# Overview of reports

Your system allows you to print reports for funds usage, postage refills, postage tracked by account, and other valuable data. The reports are accessed by pressing **Options** and selecting "Reports".

---

## Note:

The accounting reports described in this chapter are available if the Departmental Accounting feature is turned on. If INVIEW accounting is in use, refer to *Chapter 12 - INVIEW / Budget Manager Accounting* for details of the accounting reports available.

---

# Last five refills report

This report lists the last 5 postage refills.

1. Press **Options**.
2. Select "Reports".
3. Select "Last 5 Refills" report.
4. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

5. Select "Yes" to return to the Reports Menu, or press "No" to return to the Home screen.

# Funds report

This report lists the postage used, postage available, pieces processed, and other information about your machine usage.

1. Press **Options**.
2. Select "Reports".
3. Select "Funds Report".
4. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

5. Select "Yes" to return to the Reports Menu, or press "No" to return to the Home screen.

# Single account report

This report provides the postage history for a single account (if the Departmental Accounting feature is set up on your system).

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select "Single Account".
5. Select an account.
6. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.
7. Select "Yes" to return to the Reports Menu, or press "No" to return to the Home screen.

# Multi account summary report

This report provides the postage history for multiple accounts (if the Departmental Accounting feature is set up on your system).

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select "Multi-Account Summary".
5. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports Menu, or press "No" to return to the Home screen.

# Account list report

This report provides a list of all of the accounts that you have configured on your system (If the Departmental Accounting Feature is set up on your system). It can only be printed if you have an external printer connected to your system.

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select "Accounts List".
5. The report is printed to the external printer.
6. Select "Return to Report Menu", or press Home to return to the Home screen.

# Upload summary report

This report provides the history of uploads to the Data Centre.

1. Press **Options**.
2. Select "Reports".
3. Select "Upload Summary".
4. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports menu or press **Home** to return to the Home screen.

# System setup report

This report lists the complete system setup of your system. It can only be printed if you have an external printer connected to your system.

1. Press **Options**.
2. Select "Reports".
3. Select "System Setup".
4. The report is printed to the external printer.
5. Select "Return to Report Menu", or press **Home** to return to the Home screen.



# Error report

This report provides a history of error codes that your machine has encountered.

1. Press **Options**.
2. Select "Reports".
3. Press **Page Down** (if necessary).
4. Select "Error".
5. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports menu or press **Home** to return to the Home screen.

# Configuration report

This report lists configuration information about your machine and Postage by Phone® account.

1. Press **Options**.
2. Select "Reports".
3. Press **Page Down** (if necessary).
4. Select "Configuration".
5. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports menu or press **Home** to return to the Home screen.

# Permit report

This report lists the activity of each permit print if your system is being used for permit printing.

1. Press **Options**.
2. Select "Reports".
3. Press **Page Down** (if necessary).
4. Select "Permit".
5. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports menu or press **Home** to return to the Home screen.

# Software version report

This report lists the activity of each permit print if your system is being used for permit printing.

1. Press **Options**.
2. Select "Reports".
3. Press **Page Down** (if necessary).
4. Select "Software Version".
5. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports menu or press **Home** to return to the Home screen.

# Rates summary report

This report lists the versions of rate used in your system.

If you have a problem and call your machine supplier, this information may assist in the fault finding process.

1. Press **Options**.
2. Select "Reports".
3. Press **Page Down** (if necessary).
4. Select "Rate Summary".
5. When prompted, insert a tape sheet or envelope into machine.  
The report is printed.

---

## Note:

If it is a multi-page report, you will be prompted to insert another envelope/tape sheet.

---

6. Select "Yes" to return to the Reports menu or press **Home** to return to the Home screen.

# 11 - Standard accounting

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# Overview of the accounting feature

If your model has the departmental accounting feature, you can setup your system to track postage costs incurred by individuals or departments in your organisation (e.g., Engineering, Sales, etc.). The number of accounts available on your system is based on the amount purchased or supplied with your model. Your system stores the following information for each account:

- A name up to 15 alphanumeric characters long.
- An account number.
- The count total. This is the total number of pieces of mail charged to an account since it was last cleared.
- The value total. This is the total amount of postage charged to an account since it was last cleared.
- An account password

The maintenance of your accounts is done through options on the Accounts menu, accessible by pressing **Options** and the selecting "Accounts".

Each Accounts menu option is discussed in this chapter.

# Turning on accounting (if available)

If you have the Accounting option, follow the steps below to turn on the accounting feature.

1. At the home screen, press **Options**.
2. Select “Accounts”.
3. If the supervisor password is enabled, you will be prompted to enter it and select “OK” to continue.
4. When prompted, select “Account Type: .....”.
5. Select “Standard”.
  - If no accounts are present on the system, you will be notified that you need to have at least one account in order to use accounting. Select “Create an Account” to continue. Go to step 5 in Creating an Account in this chapter to create a new account.
  - If accounts are present on the system, the Accounts screen will appear.

## *Selecting an Account*

You can select an account to track postage if the optional departmental accounting feature has been bought and turned on.

Refer to Page 51 of this guide for information about selecting an account.



# Turning off accounting

You can temporarily turn off the Departmental Accounting whenever you wish.

---

## Note:

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

---

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. When prompted, select "Account Type: .....".
5. Select "Turn Accounting OFF". Press **Home** to return to the home screen with no account displayed.

# Creating an account

You need to create an account before you can use the departmental accounting feature to track postage.

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Create New Account".

---

## Note:

If no accounts are present on the system, you will be notified that you need to have at least one account in order to use accounting. Select "Create an Account" to continue.

---

5. The system will prompt for the name of this account. Type in a name for the account. It can be up to fifteen alpha/numeric characters long. Select "OK" to continue.

6. The New Account Created Screen appears.
    - a. Select “Name” if you would like to edit the account name. Select “OK” to return to the New Account created screen.
    - b. If the supervisor and accounts password are enabled, you will have the option of adding an account password. Select “Edit Acct Password” and enter the 4-digit password. Select “OK” to confirm.
    - c. Select “Number” if you would like to assign a number to the account. Select a number.
- 

**Note:**

The machine will assign the next available account number. If you wish to assign another number you can select the number from the ‘Available List’.

---

- d. Select “Continue” to return to the Accounts screen.

# Editing an account / Setting up account passwords

You can edit an account name and establish passwords for each account if you wish.

1. Press **Options**.
2. Select “Accounts”.
3. If the supervisor password is enabled, you will be prompted to enter it and select “OK” to continue.
4. Select “Edit Accounts”
5. Select an account to edit.
6. The Edit Account screen appears.
  - a. Select “Name” if you would like to edit the account name.
  - b. If the supervisor and account passwords are enabled, you will have the option of editing the account password. Select “Password” and enter the 4-digit password. Select “Continue” to return to the Edit Account screen.
  - c. Select “Number” if you would like to change the number assigned to the account. Select a number from the list.
  - d. Select “Continue” to return to the Accounts screen.

# Turning on account passwords

You can turn on the requirement for all operators to enter passwords (if passwords are set up) when choosing an account.

---

## Note:

The Supervisor Password must be turned on before you can use this feature. If it is turned on, you will be presented with an option to enter the Supervisor Password.

---

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Accounting Password: OFF".  
The display will change to "Accounting Password: ON".
5. Press **Home** to return to the home screen.

# Turning off account passwords

You can turn off the requirement for all operators to enter passwords (if passwords are set up) when choosing an account.

---

## Note:

The Supervisor Password must be turned on before you can use this feature. If it is turned on, you will be presented with an option to enter the Supervisor Password.

---

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Accounting Password: ON". The display will change to "Accounting Password: OFF".
5. Press **Home** to return to the home screen.

# Viewing account totals

You can view your account totals anytime using this option.

1. Press **Options**.
2. Select “Accounts”.
3. If the supervisor password is enabled, you will be prompted to enter it and select “OK” to continue.
4. Select “View / Clear Account Totals”.
5. The select Account to Clear screen displays. Press **Page Down**, if necessary to select an account.
  - a. You may either key in the first digit of the account number if you know it and press **Enter**, OR
  - b. Select the account name.
6. The account name, pieces, and value of the postage used displays.
7. Press **Home** to return to the home screen.

# Clearing account totals

You can clear an account total anytime using this option.

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "View / Clear Account Totals".
5. The select Account to Clear screen displays. Press **Page Down**, if necessary to select an account.
  - a. You may either key in the first digit of the account number if you know it and press **Enter**, OR
  - b. Select the account name.



6. The account name, pieces, and value of the postage used displays. If you want to clear the account:
    - a. Select “Clear Totals” to clear the totals for account.
- 

**CAUTION:**

Ensure that you do not delete this information unless you are certain that you want to. This information can not be retrieved after deletion.

---

- b. The Confirm Clear Totals screen displays. Select “Yes”.
  - c. If you want to view / clear another account select “Yes” to return to the Select Account to Clear screen. Otherwise select “No”.
7. Press **Home** to return to the home screen.

# Clearing all accounts

You can clear the postage totals on all accounts when necessary.

---

## CAUTION:

Make sure you really want to clear all your accounts. Once you do, the information can not be retrieved.

---

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Clear All Account Totals".
5. When prompted to clear all account totals, select "Yes".
6. The system indicates that the totals for all accounts are cleared. Select "OK" to return to the Accounts screen.
7. Press **Home** to return to the home screen.

# Deleting an account

You can delete an account and remove it and its contents from the system.

---

## CAUTION:

Make sure you really want to delete an account. Once you do, the account information can not be retrieved.

---

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Delete Accounts".
5. The "Select Account" screen displays. Press **Page Down** if necessary To select an account:
  - a. You may either key in the first digit of the account number if you know it and press **Yes/Enter**, OR
  - b. Use the appropriate selection key next to the display.

6. When prompted to delete the account, select “Yes”.
  - If the deleted account was the last account on the system you will be prompted to “Create New Accounts” or “Turn Accounting OFF”. Select the appropriate option and follow the prompts to continue.
  - If the deleted account was not the last account on the system you will be asked if you want to delete another account. Select “Yes” to return to the Select Account screen (step 5). Select “No” to return to the Accounts screen.

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# 12 - Inview / Budget Manager accounting

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# Introduction

INVIEW and Budget Manager are packages which provide extended accounting features. Budget Manager offers additional features over the INVIEW package.

Use of INVIEW requires fitting a kit that is supplied with your system. Details of fitting the INVIEW kit are available on the web. Visit <http://www.pitneybowes.com/uk/support/europe-doc-code-lookup.html>, select your countries flag then select the Inview kit installation instructions (9691).

Budget Manager is a purchasable option. Contact your machine supplier for more information.

INVIEW or Budget Manager is enabled and controlled through the normal system menus as described in this chapter. Both packages use an external memory module which is connected to your system via one of the USB ports.

Please note: INVIEW can also be referred to, in some instances as Budget Manager Lite.



# Turning Inview / Budget Manager on

If you have purchased the INVIEW/ Budget Manager Accounting option, follow the steps below to turn on the feature.

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. When prompted, select "Acct Type: .....".
5. Select "INVIEW/ Budget Manager". After a few seconds, the INVIEW/ Budget Manager main menu will display.

# Turning Inview / Budget Manager off

You can temporarily turn off INVIEW/ Budget Manager Accounting whenever you wish.

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Account Type: INVIEW/ Budget Manager".
5. When prompted, select "Turn Accounting OFF".
6. Press **Home** to return to the home screen with no account displayed.

# Logging on to Inview / Budget Manager

The screen that displays when you start up your mailing system depends on whether or not you have set up operators on your system. For more information on how to set up operators, refer to Setup Operators on page 233 of this guide.

## *If Your System is Set Up for Operators*

When you start the system you are prompted to enter your Operator ID, and if passwords are required, your Operator Password. Once you enter your password, the INVIEW/ Budget Manager Main screen appears.

## *If Your System is not Set Up for Operators*

When you start the system, the INVIEW/ Budget Manager Main screen appears and you can begin processing mail immediately.

## *If Your System is Locked*

When you start the system, the Locked screen appears.

- If operators are enabled, you will need to enter a password to unlock and to log on to the system.
- If operators are disabled, you will need to enter a password to unlock the meter.

Once you have unlocked the system the INVIEW / Budget Manager Main screen appears.

**If your system is set up for operators**

Once you are finished processing mail, press the Lock key to log off the system. You may be prompted to log off or lock meter if the Lock Meter feature is turned on.

# Importing and backing up data using the PC Transfer Utility

A software program called “PC Transfer Utility” is available to allow accounting data to be transferred to a PC for backup/restore.

In order for Inview / Budget Manager to be able to interface with the PC Transfer Utility software installed on your PC, your mailing system must be attached to a LAN.

For more information about the PC Transfer Utility, please refer to the Help file located in the PC Transfer software on your PC.

# Uploading Inview / Budget Manager data to Total Meter Reporting

If you have access to the Pitney Bowes My Account webservice and have registered with Inview for Total Meter Reporting, it is necessary to upload accounting information periodically from Inview / Budget Manager to the accounting Server.

This can be performed in 2 ways, either

1. During a Balance Enquiry
  - a. Carry out a balance enquiry as detailed on page 5-4.
  - b. If Accounting data is present you will be prompted to upload accountable data.
  - c. Choose Upload Now? or Upload Later?
  - d. Follow the on-screen prompts to complete the task.
2. From the Options button.
  - a. Press **Options** and then press **Page Down**.
  - b. Choose menu item Data Centre Options.
  - c. Choose Data Upload.
  - d. Follow on-screen prompt to complete the task.

## *External Memory*

To enable Inview / Budget Manager to work, the memory stick supplied must be connected to one of the USB ports on the rear of the mailing system.

# Setting a station ID

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

Station IDs are numeric and must be two characters in length.

Follow the step below to set a Station ID:

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** then select "Station ID: ..."
5. Key in the Station ID, then select "OK".
6. Press **Home** to return to the Home screen.

# Setting the owner (Budget Manager only)

Follow the steps below to enter information about the owner of the Budget Manager system.

1. Press **Options**.
2. Select “Accounts”.

---

## Note:

If the supervisor password is enabled you will be prompted to enter it and select **OK** to continue.

---

3. Use the down arrow key to scroll through the menu options, then select **Owner**.
4. Select **Name**. Type in the owner’s name and press **Enter**.
5. Select **Address 1**. Type in the address information (e.g. the street address) and press **Enter**.
6. Select **Address 2**. Type in any additional address information and press **OK**.
7. Press **OK** to save the owner information.
8. Press the **Home** key to exit setup and return to the main screen.



# Setting up Job ID's / Job ID 1 and 2

You can set up your system to make Job ID's mandatory with every transaction. You will also be able to retain or clear the Job ID after each transaction, with the Auto Clear facility. Budget Manager allows you to set up two job ID's, Job ID 1 and Job ID 2.

Follow the steps below to set up mandatory Job ID's:

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Job ID Required: ..." to toggle the option on or off, as required.
5. Press **Page Down** and select "Job ID Auto Clear: ..." to toggle the option on or off, as required.
6. Press **Home** to return to the home screen.

# Configuring the optional barcode scanner

If you have an optional barcode scanner attached to your system, you can configure it to scan in account names or account codes if you are using the Inview / Budget Manager accounting system.

---

## Note:

You can use a barcode scanner to scan in barcodes for electronic confirmation services regardless of the accounting system you are using. Electronic confirmation services do not require any set up operations here.

- 
- You can set the default scan type so that your system recognises your particular accounting application when it scans the barcode. Refer to *Setting the Default Scan Type*.
  - Long account names require split barcodes. If you need to combine multiple barcode scans into a single barcode, refer to *Combining Barcodes*.
  - If you want your system to require an operator to press the **Enter** key to accept each barcode value after it is scanned and displayed, refer to *Setting Auto-Enter*.

# Setting the default scan type

When using the Inview / Budget Manager accounting system on your system, you can set up the scanner so that it interprets the barcode as an account name or account code. Your selection of account name or account code depends on the way you wish to use your accounting system.

To set the default value:

1. Press **Options**.
2. Select "Setup".
3. Press **Page Down** and select "Configure USB Scanner".
4. At the USB Barcode Scanner Settings menu, select "Home Default".
5. For use with Inview / Budget Manager, select the appropriate option:
  - Account name
  - Speed code
  - Preset
  - Job ID
6. If you do not want any default account system or preset, select "None".
7. As soon as you make your selection, the USB Barcode Scanner Settings menu reappears. You can make other selections or press **C (clear)** to return to the setup menu.

# Combining Barcodes

If you need to combine multiple barcode scans into a single barcode, use this setup option. For example, the typical barcode scanner can only accept a maximum of 30 characters. If you want to scan an account name that contains more than 30 characters, say 50 characters, you add a “join character” at the end of the first 30 characters. These first 30 characters with the join character at the end, would be on the first line and the second 20 characters would be on the second line. When you scan these two barcode lines, the system will combine them into a single barcode account value.

To select the character to join multiple barcode scans:

1. Press **Options**.
2. Select “Setup”.
3. Press **Page Down** and select “Configure USB Scanner”.
4. At the USB Barcode Scanner Settings menu, select “Concatenate cbar.”.
5. A list of possible “join character” options is displayed. Select the character you use to combine the barcode values (the default join character is +).
6. As soon as you make your selection, the USB Barcode Scanner Settings menu reappears. You can make other selections or press **C (clear)** to return to the setup menu.

The following is an example using a + symbol as a join character.



When you scan in these 3 barcodes, the system will combine them into a single barcode value.

---

**Note:**

When creating your own barcodes, create them in upper case. If you create them in lower case, the length of the barcode will be twice that of the same barcode created using upper case text.

---

# Adding barcode prefixes

If you want to create barcodes with a prefix, you can set up your system to recognise this prefix when you scan the barcode. This prefix identifies whether you are scanning in an account name, account code, custom preset or job ID.

You may use prefixes from a set of pre-printed barcode labels that have a prefix as part of the barcode. Using these barcodes allows you to scan directly into the Home screen.

It is possible to set the system so that it will recognise either a 1 or 2 character header, this must be set before using the barcode scanner.

To set the prefix characters:

1. Press **Options**.
2. Select "Setup".
3. Press **Page Down** and select "Configure USB Scanner".
4. At the USB Barcode Scanner Settings menu, select "Prefix Setup".
5. Select the prefix size and then select **1** or **2** whichever is appropriate.

6. Select the appropriate prefix option to change the default for your system.

Barcode Prefix contains	Default Character
Account Name Prefix	A
Speed Code Prefix	C
Preset Prefix	P
Job ID Prefix	J

7. When you select the prefix option, the default value for the option appears on the screen. To enter a new value, press **C (Clear)** to remove the default, then type in the prefix character(s).
8. Press **Enter**, the USB Barcode Scanner Settings menu reappears. You can make other selections or press **C (Clear)** to return to the setup menu.

# Setting Auto-Enter

You can set up your system so that after it scans in a barcode value and displays it on the display, it requires you to press **Enter** to accept that value. You can do this if you want to be sure that an operator verifies that the correct barcode has been scanned. By default, the system will automatically enter the value as soon as it scans in the barcode.

To require you to press **Enter** to accept each scan:

1. Press **Options**.
2. Select "Setup".
3. Press **Page Down** and select "Configure USB Scanner".
4. At the USB Barcode Scanner Settings menu, select "Auto-Enter".
5. Select **Off** to disable the Auto-Enter. This will now require you to manually press **Enter** after each scan.



# Preparing Barcodes

Barcodes must be prepared using extended 3 of 9 code. All codes must begin and end with an asterisk (\*).



Using lower case:



Using an account prefix:



If Sub or Sub Sub accounts are used add a hyphen (-) between the account names:



# Configuring operators

## *Enabling Operators*

Follow the steps here to set up your mailing system so that you can assign operators with an ID and 4-digit alphanumeric password.

1. Press **Options**.
2. Select "Setup".
3. Press **Page Down** and select "Operator Setup".
  - a. If a supervisor password has not been created, the screen will prompt you to create one now OR
  - b. If a supervisor password is active, the screen will prompt you to enter the password now.
4. Select "OK", then select "Create Operator".
5. Type in the operator name and select "OK" to continue.
6. Type in the operator password and select "OK". Then confirm it and select "OK" again.
7. The screen will now show the following operator information that you can change:

**Name:** Select this option to edit an operator's name.

**Status:** Select this to toggle an operator active or inactive.

**Password:** Select this option to toggle between enabling and disabling the operator password for this operator. You can also use this option to edit the password.

**Level:** Select this option to change the access level for this operator.

**Report Printing:** Select this option to toggle between enabling/disabling report printing for this operator.

When finished, select "Continue" to save.

8. The screen will now revert to the Setup Operators menu. Within this screen are three options which **globally** control the operator function and the use of operator passwords:

**Operators:** Select this option to turn the entire operator log in function on or off. i.e. If you wish to use Operator log in, this option **must be turned on**.

**Operator Passwords:** Select this option to turn operator passwords on or off on a global basis. i.e. If you wish to use Operator Passwords, this option **must be turned on**.

**Auto Log Off:** When ON, will log off the operator if the machine has not been used for 'x' minutes (where 'x' is the timeout setting).

When OFF, the machine will not automatically log off the operator.

# Setup operators

Once the operator function has been enabled as described on the previous page, you can control the set up of the operators as follows:

1. Press **Options**.
2. Select "Setup".
3. Press **Page Down** and select "Operator Setup".
4. Type in the supervisor password. You will now be offered the following functions:
  1. Create operator
  2. View / Edit operator
  3. Delete operator
  4. Operators Off / On\*
  5. Operator Password Off / On\*
  6. Auto Log Off\*

\* These options globally control operator functions and are described on the previous page.

5. Choose the option you want, and follow the on screen instructions. When done, press **Home** to exit .

Any changes you make will take effect the next time you or another operator logs onto the system. At that time, the system will require a valid operator ID and password to log on.

An operator can log off from the mailing system by simply pressing the **Lock** button located to the left of the display. The system will then require the next operator to log on with their ID and password. Additionally, you can also set the machine to Auto Log Off, which will operate should the operator walk away from the machine without logging off.

# Important notes regarding operator functions

## *Deleting Operators*

If there is transaction data associated with an operator and you delete the operator, the system does not actually remove the operator until the end of the fiscal year. Instead, the operator becomes inactive, and will not be able to log on to the system.

At the end of your fiscal year, you will get a prompt that the last reporting period has ended. At that time, you must select the inactive operator(s) you want to permanently delete and redefine the yearly fiscal period.

If there is no information connected to the operator, the system will actually remove the operator at the time you delete it.

## *Viewing / Editing Operators*

The Viewing / Editing Operators screen allows you to access operator specific information that has been entered into the Budget Manager system. You can view or edit the operator's name; lock or unlock the operator; enable, disable, or edit a password; enable or disable report printing; and edit the access level.

# Inview / Budget Manager account structure

You can use Inview / Budget Manager to track and account for postage used by departments or individuals within your organisation. Your system is set up to accept a total of 74 characters for single level accounts, a total of 73 characters for an account and sub account, and a total of 72 characters for an account, subaccount, and subsubaccount.

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

---

## Note:

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

---

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

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

Example: Account - Engineering

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

Examples:

Account - Engineering, Subaccount - Software

Account - Engineering, Subaccount - Design

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

- If you create subsubaccounts for subaccounts, the subsubaccounts become the end links and identify the departments that are charged for postage.

Examples:

Account - Engineering, Subaccount - Software, Subsubaccount - Testing

Account - Engineering, Subaccount - Software, Subsubaccount - Design

Account - Engineering, Subaccount - Industrial Design, Subsubaccount - Graphics

Account - Engineering, Subaccount - Industrial Design, Subsubaccount - User Testing



# Turning account passwords on / off

You can turn on the requirement for all operators to enter passwords (if passwords are set up) when choosing an account.

---

## Note:

The Supervisor Password must be turned on before you can use this feature. If it is turned on, you will be presented with an option to enter the Supervisor Password.

---

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** until "Accounting Password: ..." is displayed. Selecting "Accounting Password: ..." will toggle between ON and OFF as required.
5. Press **Home** to return to the home screen.

# Creating accounts

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Create New Account".
5. Enter the account name and then select "OK".

---

## Note:

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

---

6. The Account Information menu appears, offering the following options for the account being created:

**Name:** Select this option to edit the name of an account.

**Password:** This option appears only if account passwords are enabled. The account password is a four digit number that you can assign to limit access to an account. As soon as you enter the name of your account, the system will request that you enter the account password if it is enabled. Select this option to assign, change or disable the password if necessary. When you are running mail, passwords must be globally enabled. This feature should not be used if operator log on is in use.

**Spd Code:** A speed code is a number that uniquely identifies an account. You can use it as a short cut to identify accounts with long names. As soon as you enter the name of your account, the system automatically assigns the next available speed code to your account. Select this option to change the speed code number assigned by the system. It allows you to select from the next 500 available speed codes.

**Owner:** You can use this option to edit the Owner Name, Address and Telephone Number (Budget Manager Only).

**Descript:** This option allows you to type in a brief description of the account.

**Spending Limit:** Select this option to edit the Spending Limit for any Account that has a set Budget (Budget Manager Only).

**Budget:** Select this option to edit the Budget setting for an Account (Budget Manager Only).

**Add Sub Acct:** Select this option to add a subaccount to your new account.

7. When you are done, select "Continue" to save your account information. If you exit the screen without selecting "Continue", changes are lost.
8. Press **Home** to return to the Home screen.

# Creating a subaccount or subsubaccount

1. Press **Options**.
2. Select "Account".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Add Sub Account".
5. The system displays a list of all the existing accounts. If necessary, page down to scroll through the list of accounts. Select the account you would like to add a subaccount or subsubaccount to.
6. Select "Add Sub Account" or "Add SubSub Account", as required.
7. Type in the name of the new subaccount or subsubaccount and select "OK". The Account Information Screen appears.
8. Select and configure any of the options in the same way as creating an account (see page 240).
9. When you are done, select "Continue" to save your account information. If you exit the screen without selecting "Continue", changes are lost.
10. Press **Home** to return to the Home screen.

# Viewing or editing accounts

You can view or edit the name, status and description for all of the accounts, subaccounts or subsubaccounts entered into INVIEW/ Budget Manager (lowest level):

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "View/Edit Accounts".
5. The system displays a list of all the existing accounts. If necessary, page down to scroll through the list of accounts. Select the account you would like to view or edit.
  
6. Select the appropriate option and follow the prompts.

**Name:** Select this option to make changes to the name of the account you have selected.

**Password:** The account password is a four digit number that limits access to an account.

**Spd Code:** Allows you to change the speed code of the account.

**Owner:** Use to edit the owner name, address and telephone number (Budget Manager Only).

**Description:** Select this option to edit the account description.

**Spending:** Select this option to edit the spending limit on an account (Budget Manager Only).

**Budget:** Allows you to edit the budget setting for an account (Budget Manager Only).

**Manage Sub Acct:** Select this option to add, view or edit a subaccount of the account selected.

**Status:** Once you have added an account to the system, you can set the account active or inactive. Active status is the default setting for all accounts. If you have an account that you no longer wish to use, you can set the status to inactive. The inactive account will remain on the system, but you will not be able to process transactions against it.

7. When you are done, select "Continue" to save your account information. If you exit the screen without selecting "Continue", changes are lost.
8. Press **Home** to return to the Home screen.

# Deleting accounts

When deleting accounts be advised that:

- If there is no information connected to the account, the system will remove the account when you delete it.
- If there is any information connected to an account (for example transaction data), the system will not allow you to delete the account. Instead it will offer you the option of either cancelling or setting the account status to inactive. If you select inactive, the system will notify you when the last period of the fiscal year ends. At that time, you must select the inactive accounts you want to permanently delete and redefine the yearly fiscal period.

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Delete Accounts".
5. The system displays a list of all the existing accounts. If necessary, page down to scroll through the list of accounts. Select the account you would like to delete.
6. Confirm that you really want to delete the account by selecting "Yes".
7. Choose whether you wish to delete further accounts by selecting either "Yes" or "No".
8. Press **Home** to return to the Home screen.

# Clearing account data

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## CAUTION:

Clearing the account data permanently erases all transaction data.

---

**It is recommended that the supervisor password be active and the accounting protection be turned on. This will prevent unauthorised persons from clearing the accounting data.**

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Clear Account Data".
5. Select "Print Reports" if you wish to print account reports before clearing the data.

OR

6. Select "Clear All Data".
7. Confirm that you really want to clear all the data by selecting "Yes".
8. Press **Home** to return to the Home screen.



# Selecting the account period

When you enter the start date for the fiscal year, the system automatically determines the end date. (For example, if 1st January 2018 is the beginning of your fiscal year, the system sets the end date at 31st December 2018.)

Once the fiscal year is set, you will need to select the number of accounting periods. You can select one of the standard accounting periods (none, annual, twice yearly, quarterly, and monthly) or you can define your own custom reporting period.

Follow the steps below to set your fiscal year and select the type of accounting period you will use:

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Acct Period: ...". The Accounting Period screen appears.
5. Select "Edit Start of Fiscal Year".
  - a. Press **Clear**.
  - b. Type in the start date of your fiscal year.
  - c. Select "OK" to save the date. The Accounting Periods screen reappears.
6. Select "Period". (see notes on the next page). Select the number of periods for your fiscal year (Annual, Twice a Year, Quarterly, Monthly or Custom). Page down to scroll through the list, if necessary.

7. If you select custom periods, the Custom Period screen appears.
    - a. Select "End Date 1" to set period 1 end date.
    - b. Type in the end date of the period and select "OK".
    - c. Select "End Date 2" to set period 2 end date.
    - d. Type in the end date of the period and select "OK" again to exit the Custom Period menu.
- 

Note:

Period 1 is the current period and period 2 is the running total i.e. Year to date.

---

8. Select "Continue" to return to the Accounting Setup Menu.
9. Press **Home** to return to the Home screen.

---

Notes:

### **Standard Periods**

When a period in the fiscal year reaches its cut-off date, the system will automatically start the next period and store the existing period. For example: If you have set the periods for monthly, at the 1st July the June period will be saved and July will now be the current period. At the end of the fiscal year, the system will prompt you to clear all 12 periods.

### **Custom Periods**

The start date for a custom reporting period is the date you activate the custom period on your system. The custom reporting period will have to be reset on the end date you select for it. At that time, you will be required to enter the next end date for your custom reporting period.

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# Global surcharge

A Global Surcharge is a surcharge (or discount) that applies to each transaction (or batch) processed by Inview / Budget Manager, unless a **batch surcharge overrides it. You can apply a global surcharge per piece of mail, per transaction, and/or per transaction percentage.**

- A per piece of mail surcharge is calculated by multiplying the number of pieces processed by the surcharge setting. The per piece surcharge can be set anywhere from -1.000 to 1.000.
- A per transaction surcharge is applied to each batch (or transaction) run on the system. The per transaction surcharge can be set anywhere from -50.00 to 50.00.
- A per transaction percentage surcharge is calculated multiplying the postage cost of the entire batch by the percent transaction setting. The per transaction percentage can be set anywhere from -100% to 100%.

If you want to apply a batch surcharge, or a surcharge that is customized for a specific transaction, see [Entering a Surcharge](#) on page 258 of this guide.

# Turning global surcharge on or off

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Surcharge: ...". The Global Surcharges screen appears.
5. Press **Page Down** and select "Surcharge: ..." to toggle the surcharge option ON or OFF, as required.
6. Select "Continue" to return to the Accounting Setup Menu.
7. Press **Home** to return to the Home screen.

# Selecting the global surcharge method

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Select "Surcharge: ...". The Global Surcharges screen appears.
5. Select the type of surcharge you wish to apply:
  - Per Piece: The surcharge or discount is applied to each individual piece of mail processed.
  - Per Trans: The surcharge or discount is applied to each transaction.
  - Per Trans %: The surcharge or discount is applied to each transaction and is a percentage of the transaction cost.

In each case, select "Change to Discount Value" if you wish to apply a discount rather than a surcharge.

A **negative** amount indicates a **discount** will be applied to the postage amount for a transaction.

A **positive** amount indicates a **surcharge** will be applied to the postage amount for a transaction.

6. Select "OK" to confirm your selections.
7. Select "Continue" to return to the Accounting Setup Menu.
8. Press **Home** to return to the Home screen.

# Selecting an account to print postage

You can select an Inview / Budget Manager account in a variety of ways:

You can select an account manually by scrolling through the entire list of accounts on your system.

If you know part of the account name or the speed code, you can use the account name search or the speed code search to locate the account you want to use.

If you know only part of the account name or the speed code, you can use the account name or speed code search to narrow down the list of accounts to those that most closely match the search criteria you entered.

# Selecting an account manually

1. Select “Account: ...” from the Home screen. The Select Account screen appears listing all of your accounts.
2. Select the Account you want to use to charge postage. Use the **Page Down** key to scroll through the Account list, then press the screen key that corresponds with the account name.
3. If the Account password is enabled, the Enter Account Password screen appears. If the account password is not enabled, go to step 4.
  - a. Type in the password.
  - b. Select “OK”.
4. The system returns to the Home screen. The name of the account you selected appears on the display.



# Selecting an account by name

The account name search allows you to type in the account name, or part of the account name, to narrow down your search.

1. Select “Account: ...” from the Home Screen. The Select Account screen appears listing all of your accounts.
2. Type in the first few characters of the account name. The list on the screen will show all the account names that start with the characters you have entered.
3. Select the account you want to use:
  - Press **Enter** to select the account that most closely matches the characters you searched on; **or**
  - If a list of account names appear on the screen, press the screen key that corresponds with the account you want to use.
4. If the account password is enabled, the Enter Account Password screen appears. If the account password is not enabled, go to step 5.
  - a. Type in the password.
  - b. Select “OK”.
5. The system returns to the Home screen, and the name of the account appears on the display.

# Selecting an account by Speed Code

The speed code search allows you to type in the speed code, or part of the speed code, to narrow your search.

1. Select “Account: ...” from the Home Screen. The Select Account screen appears listing all of your accounts.
2. Type in the speed code, or the first few numbers of the speed code. The screen will show the account names that correspond with the speed code you typed.
3. Select the account you want to use:
  - Press **Enter** to select the account that most closely matches the characters you searched on; **or**
  - If a list of account names appear on the screen, press the screen key that corresponds with the account you want to use.
4. If the account password is enabled, the Enter Account Password screen appears. If the account password is not enabled, go to step 5.
  - a. Type in the password.
  - b. Select “OK”.
5. The system returns to the Home screen, and the name of the account appears on the display.

# Entering a surcharge

When you select the surcharge method from the Home Screen, you are setting a **batch surcharge**, or a surcharge that will be applied only to the current transaction being processed by Inview / Budget Manager.

Setting a batch surcharge will override your global surcharge settings, but only for the current transaction. Once the transaction is complete, the system will revert to the global surcharge settings for the system.

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

If you want to set up a **global surcharge**, or a surcharge that will be applied to each and every transaction processed by the Budget Manager system, see Global Surcharges on page 251.

1. At the Home Screen, press the **Page Down** key.
2. Select “Surchrg:”. The Batch Surcharges screen appears.
3. To clear the existing batch surcharge settings, press **Page Down** and select “Clear All Surchrg”. The per piece, surcharge per transaction, and per transaction percentage surcharges are set to 0.
4. To add a surcharge per piece:
  - a. Select “Per Piece”.
  - b. Type in the surcharge amount you wish to use for each individual piece of mail and select “OK”.
5. To add a surcharge per transaction:
  - a. Select “Per Trans”.
  - b. Type in the surcharge amount you wish to use for each transaction and select “OK”.

6. To add a surcharge per transaction percentage:
  - a. Select “Per Trans %”.
  - b. Type in the percentage amount you wish to use and select “OK”.
7. Select “Continue” to save your changes.

# Selecting Job IDs / Job ID 1 and 2

A Job ID field allows you to identify specific tasks within an account. Assigning a Job ID to a transaction allows you to track the amount of money you spend on postage, as well as how frequently you process a given transaction.

1. At the Home screen, press the **Page Down** key.
2. Select “Job ID”. The Job ID screen appears.
3. Type in the Job ID number and select “OK”; or select the “Select from Recent List” option, then select the Job ID. (You can use the **Page Down** key to scroll through the list.)
4. The system returns to the Home Screen once you have made your Job ID selection.
5. Repeat steps 1, 2 and 3 to change or add another Job ID.

See Job IDs on page 224 for more details of Job IDs.

Depending on your system, you can store up to 25 or 50 Job IDs at any one time.

# Entering manual transactions

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and Select "Transactions Options".
5. Select "Add Manual Transaction". The Add Manual Transaction screen appears. The options you choose to use will vary depending upon your manual transaction needs:

**Account:** Select this option to choose an account from the available accounts on your system to run the manual transaction against.

**Job ID/ Job ID 1 and 2:** Select this option to assign Job IDs to the manual transaction.

**Class:** Select this option to set the postage class.

**Postage:** Select this option to set the total actual postage amount for the transaction.

**Chrg Amt:** Select this option to set the total postage amount that you will be charging for the transaction. (This is the actual postage amount plus any surcharges you may want to add.) By default, this sets to the same postage as the actual postage amount.

**Piece Ct:** Select this option to set the number of pieces of mail you want the manual transaction to indicate were sent.

**Weight:** Select this option to set the total weight of all pieces of mail.

6. Once you have finished setting up your manual transaction, select “Continue” to save your changes. The system will return to the Home screen.

---

**Note:**

The maximum amount you can enter in paragraphs 5 and 6 above is limited to the maximum value you can select on your machine.

---

# Transferring transaction data

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

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Transactions Options".
5. Select "Transfer a Transaction". The Select Account screen appears.
6. Use the **Page Up** and **Page Down** keys to scroll through the account list and then select the account you want to transfer the transaction FROM.
7. Select the transaction you want to transfer. The Select Account To Transfer To screen appears.
8. Select the account you want to transfer the transaction TO.
9. Once you have finished setting up your transaction transfer, select "Continue" to save your changes. The system will return to the Home screen.



# Clearing the transaction log

When the transaction log reaches full capacity, you can clear out the log to allow the inclusion of new transactions.

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Transactions Options".
5. Select "Clear Transaction Log". The Clear Transaction Log screen appears.
6. If you want to print a report select "Yes". If you do not want to print a report select "No". The Continue to Clear Log screen appears.
7. Select "Yes" to clear the log. The system returns to the Transaction Options screen.
8. Press **Home** to return to the Home screen.

---

## Note:

The transaction log can only be cleared after an upload to the data centre has been completed.

---

# Setting the condition for the log full warning

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

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select “OK” to continue.
4. Press **Page Down** and select “Transactions Options”.
5. Press **Page Down** and select “Full Log Warning”.
6. Type in the percentage you want use (from 80 to 100) and select “OK”. The system returns to the Transaction Options menu.
7. Press **Home** to return to the Home screen.

# Defining the log full action

The Action When Full option allows you to select the action you want the system to take when the transaction log is full. You can choose to stop processing mail, or process mail and overwrite the transaction log (see notes below).

1. Press **Options**.
2. Select "Accounts".
3. If the supervisor password is enabled, you will be prompted to enter it and select "OK" to continue.
4. Press **Page Down** and select "Transactions Options".
5. Press **Page Down** and select "Full Log Action".
6. Select the action you want the system to take. The system returns to the Transaction Options menu.
7. Press **Home** to return to the Home screen.

---

## Notes:

If you select 'Continue and overwrite Log', when the log is full the system will continue processing mail and **erase the old transactions**. The normal setting is 'Stop processing mail'. This allows you to print off the Transaction log or download the transaction log to a PC if you have the PC Transfer Utility programme.

If you find the system is frequently stopping due to the log being full, you might find it more convenient to print or download the log to a PC at the end of each period. At this time you could then clear the log before the start of the new period.

# Inview / Budget manager accounting reports

With Inview / Budget Manager, you have the ability to create a broader range of accounting reports than you would using the standard accounting reports on your mailing system.

The following is a list of INVIEW/ Budget Manager accounting reports:

- Custom reports
- Transaction Log
- Account summary
- Budget Performance (Budget Manager only)
- Invoice (Budget Manager only)
- Quick profile
- Accounting set up
- Account list
- Weight Break Account / Class
- Weight Break Carrier / Class
- Weight Break Job ID / Class

## *Transaction Report*

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

## *Account Summary Report*

The Account Summary Report lists a summary of pieces, postage and surcharges that have been charged to an individual account for the time period specified for the report.

## *Budget Performance (Budget Manager Only)*

The Budget Performance report lists the accounts and how they are performing against their present budget.

## *Invoice (Budget Manager Only)*

The Invoice report an Invoice to be printed by account and period.

## *Quick Profile Report*

The Quick Profile report lists the summary of pieces, postage and surcharges for all of the Budget Manager accounts. This report can be viewed on the screen.

## *Accounting Setup Report*

The Accounting Set Up report lists the options and settings for INVIEW/ Budget Manager.

## *Account List Report*

The Account List report lists the accounts that have been defined in the system. The accounts are sorted by account name, then by subaccount and subsubaccount.

## *Account Speed Code List Report*

The Account Speed Code List Report lists the accounts that have been defined in the system and the account status. The report is sorted by account speed code. Account speed codes refer to chargeable accounts.

## *Operator List Report*

The Operator List report lists the operators on the accounting system. This report contains the operator name, ID, status (enabled/disabled), and whether or not report printing is enabled (Y/N).

## *Weight Break Reports*

The Weight Break Reports list the number of pieces and postage by weight break for the selected period. The weight break report can be by:

- Account / Class
- Carrier / Class
- Job ID 1 / Class

# Printing reports

You can print accounting reports using an external (attached) printer if one is connected to your system.

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## Note:

You must enable report printing for an operator in order for that operator to print a report. See [Enabling Operators](#) on page 234 for more information.

---

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select the report you want to print. Follow the prompts, if any, that may appear.
5. Select "Print to Attached Printer" to print the report to the attached printer.
6. Press **Home** to return to the Home screen.

# Custom reports

You can design your own report formats using the Custom Reports generation feature. This tool allows you to select the report format you want (detailed or summary) as well as select the fields of information you want to appear on the report.

A summary report groups transaction information together by time period. If you select the summary report format you will be able to include any, or all, of the following data in your report:

- Account
- Postage
- Yr to date postage
- Carrier
- Surcharge
- Yr to date surcharge
- Class / Fee
- Total charge
- Yr to date global sur.
- Pieces
- Yr to date pieces\*

A detailed report outputs specific information about each transaction processed by the system. If you select the detailed report format you will be able to include any, but not all, of the following data in your report:

- Transaction ID
- Operator



- Date of transaction
- Total weight
- Time
- Pieces
- Account
- Postage
- Carrier
- Surcharge
- Class / Fee
- Total charge
- Job ID / Job IDs 1 & 2
- Transaction type

### *Custom report tips:*

- “Available” options on the Select Custom Report screen indicate open spaces where you can create a new custom report.
- When selecting data to include in the report:
  - “OK” appears next to the data name to indicate that it will be used in the report.
  - Each data selection you make will appear as a column in the report.
  - The “Spaces Used” counter on the bottom of the screen indicates how much space you have left in the report. You will receive a “Not Enough Space Left” warning if you select data that exceeds the amount of space the report can take up on the printed page.

# Creating a custom report

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select "Custom Reports".
5. Select "Create Custom Report".
6. Type in the report name, and select "OK".
7. Select the "Detailed" or "Summary" report format.
8. Press the screen keys that correspond with the data you want to include in your report.
9. Press **Enter** when you are done selecting data.
10. If you selected any data that can be subtotaled, the Select Data to Group By screen appears, otherwise go to step 11.
  - a. Press the screen keys that correspond with the data you want to subtotal in your report.
  - b. Press **Enter** once you have finished selecting data.
  - c. If you did not select accounts on the Select Data to Group By screen then go to step 11, otherwise the accounts to include screen appears.
    - a. Select "Prompt Individual Account Before Printing" to require an operator to select an account before printing the report.
    - b. Select "Include All Accounts" to include all accounts when printing the report.
11. Select "Continue" to save the custom report.

# Viewing and editing a custom report

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select "Custom Reports".
5. Select "View/Edit Report".
6. Select the custom report you want to view or edit. The Edit Report Name screen appears.
7. Use the **C (Clear)** key to delete the existing name. Type in the new report name and select "OK".
8. The Select Data to Include screen appears.
  - a. To add data to the report, press the screen key that corresponds with a column you want to include.
  - b. To remove a column from the report, press the screen key that corresponds with a column you want to remove.

9. If you selected any data that can be subtalled, the Select Data to subtotal screen appears, otherwise go to step 10.
  - a. Press the screen keys that correspond with the data you want to subtotal in your report.
  - b. Press **Enter** once you are done selecting data.
  - c. If you did not select accounts on the Select Data to Subtotal screen then go to step 10, otherwise the Accounts to Include screen appears.
    - a. Select "Prompt Individual Account Before Printing" to require an operator to select an account before printing the report.
    - b. Select "Include All Accounts" to include all accounts when printing the report.
10. Select "Continue" to save the custom report.

# Deleting a custom report

1. Press **Options**.
2. Select "Reports".
3. Select "Accounts".
4. Select "Custom Reports".
5. Select "Delete Report"..
6. Select the custom report you want to delete. The Delete Custom Report screen appears.
7. Select "Yes".
8. Press **Home** to return to the Home screen.

# Inview / Budget Manager error / warning messages

This section contains a list of problems you may encounter while using Inview / Budget Manager.

Refer to *Chapter 8 - Troubleshooting* for information on problems you may encounter while using the mailing system (e.g. envelope sealing problems, envelope feeding problems, tape feeding problems, etc.).

## *Account Limit Reached - Cannot create any more accounts*

- Contact your machine supplier to purchase an increase in the number of accounts available on your system.
- Select "Select Account to Delete". The Select Account screen appears. Follow the prompts to select an account to delete.

## *Funds and piece count registers are full. Account must be reset.*

- Select "Print Report". The Single Account Report screen appears. Follow the prompts to print the single account report and reset the account, **or**
- Select "Reset". The system resets the account.

## *External memory not responding. Please check the USB and memory device connections. Run mail without accounting?*

Inview / Budget Manager uses a memory module attached via one of the USB ports. This module holds all the accounting data.

Check that the memory device is properly connected to one of the system's USB ports.

- Select "No" if you want to recheck the device connections. The Please Wait screen appears as the system tries to re-establish the connection.
- Select "Yes" to run mail without accounting. This operation requires that an operator has supervisor access privileges.
  - If operators are enabled and the current operator has supervisor access privileges, the system disables accounting and returns to the main screen.
  - If operators are enabled and the current operator does not have supervisor access privileges, the Authorisation Required screen appears. An operator with supervisor access privileges must log on to run mail without accounting.
  - If operators are disabled, then the Enter Supervisor password screen appears. The supervisor password must be entered to run mail without accounting.

If the problem persists, contact your system supplier.

*Accounting Discrepancy xxxx has been spent without being recorded to the external memory.*

- Select "Make a Manual Transaction" to continue running mail. The Manual Transaction screen appears with the postage amount equal to the amount listed on the Account Discrepancy screen. See Entering Manual Transactions on page 262 for more information.
- Select "Ignore" to stop running mail. The system returns to the Home screen.

# 13 - Glossary

## In this section

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Glossary

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# Glossary

**Account** - A department (e.g., “Human Resources”) to which postage is charged. Your machine may allow you to set up and choose a number of different accounts. You can assign a unique name to each. The machine stores the total postage used and the number of mail pieces processed for each account. The accounting feature is optional and the total number of accounts available on your machine depends on the option purchased.

**Ascending Register (Used)** - The total amount of postage used since the machine was placed in service.

**Batch Register** - A part of the machine’s memory that stores the total postage spent and the number of pieces of mail processed. Your machine stores this information in memory for each account. You can clear the contents of the batch register if you want.

**Default** - A value or setting the machine automatically uses unless you change it. As delivered, your machine has factory-set defaults or “normal” settings. You may change these if you wish.

**Descending Register (Available / Unused)** - The postage funds available for use.

**Digital Meter Stamp** -The imprint produced by the machine.

This may include:

- The postage amount
- The date
- The machine’s serial number
- Postal Code/ Town Circle
- Information for Postal Authority use

- **Envelope Messaging.** This is an optional part of the machine stamp that lets you convey your own special message to the mail recipient. Envelope Messaging may consist of a Graphic Ad and/or a Text Message.

A Graphic Ad can be purchased and downloaded to your system.

A Text Message is text that you define which prints alongside the Graphic Ad. Text Messages are only available on certain models.

**Envelope Messaging** - An additional message that appears next to the meter's printed postal information. See "Digital Meter Stamp" above for more information.

**Graphic Ad (Advertisement)** - An advertising message that appears next to the machine's digital meter stamp. You can choose from a range of standard and custom Graphic Ads. See *Chapter 9, Supplies/Options* for ordering.

**Home Screen** - The machine display that shows your current selections. It indicates that you're ready to print postage.

**Inspection** - The process of examining the postage usage through the machine to assure accurate postal funds accounting. Your machine is subject to remote inspection whenever you add postage to it. To do an inspection, simply add postage or connect to the Data Centre as explained in *Chapter 5, Adding Postage/Connecting to Data Centre*.

**IntelliLink™** - A technology that allows you to download machine features, and postal rate and system software updates via a digital link. Future IntelliLink features will also provides online access to manage your account, purchase supplies and take advantage of a range of professional services.

**Inview** - An optional accounting package that extends the accounting abilities of the system beyond the Departmental (Standard) accounting.

**LAN** - Local Area Network. Your system can be connected to your LAN to communicate with the Data Centre.

**Lock Code** - A four-digit code that serves as a user password. It prevents unauthorised machine use.

**Mailmark™** - A standard set by Royal Mail for postal franking machines. Your DM300M/DM400M/DM475 system is Mailmark™ compliant.

**Postage by Phone®** - A service that allows you to buy postage and check account status over the phone. It also permits convenient postal inspection by phone.

**PC Meter Connect™** - Pitney Bowes software for your PC that allows your system to access the Data Centre using your PC's internet connection.

**Presets** - A custom machine setting you can call up instantly at the push of a button. You can assign each preset a number of values, depending on the postage mode you're in, how your machine is set up and what options are installed. A preset will always have a name and postage amount, and could also have an account, Envelope Messaging, class of service, operating mode and other values assigned to it.

**Serial Number** - The serial number found on the rear of the machine.

**Sleep Mode** - An energy-saving feature of your machine that clears the display after a certain period of idle time. Pressing any key wakes up the display.

**SmartLink™** - Your system can be connected to your SmartLink device to communicate with the Data Centre.

**Tape** - A sheet of self-adhering paper which you print postage on and apply to a piece of mail or package that is too big to be processed through the machine.

Mailmark™ is a trademark of the Royal Mail

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