**EDIT / POST MANIFEST**

1. Review entries made at the Manifest Entries box.
2. Click Delete to remove the entry
3. Click Edit to update/revise entry
4. Make appropriate edits and click Update Entry or Cancel
5. Click Post Manifest
6. View the Manifest Number, Total Pieces and Total Weight
7. Enter number of containers that will be shipped to Pitney Bowes
8. If desired, the User can enter a Shipment Reference and Instructions that will appear on the printed manifest.
9. Click Post.
10. Print manifest and apply to shipment to Pitney Bowes.

Note: A Posted manifest cannot be revised. If a manifest is posted unintentionally, contact your Pitney Bowes Customer Service Representative immediately.

**FILTER MANIFESTS – LOCATE AN OPEN OR POSTED MANIFEST**

1. Place cursor over Mail Management
2. Click Manifests
3. Search in 3 ways:
   a. Enter manifest number and click Search;
   b. Select Only Open Manifests and click Search; or
   c. Select All Manifests and click Search

***Locate a Posted Manifest -- FASTER***

1. Place cursor over Mail Management
2. Click All Manifests in Search Management box
3. Click Posted column heading and click on desired Manifest number; or
4. Filter for posted manifests by either: Manifest ID or Bill of Lading and click Search

**REPORTS:**
**MANIFEST REPORTS/STATEMENT OF MAILING**

1. Place cursor over Mail Management
2. Cursor over Reports
3. Click Manifest Reports
4. Search for Manifests by Date Range, Manifest Number, Reference or BOL Range –or– click on Verified Column to view Manifests.
5. Click on desired Manifest or Ctrl + Click for multiple manifests.
6. Under Report Options select a group by:
   - BOL
   - Cost Center
   - Reference
   - Product Class
5. Select Optional Columns
6. Click Generate

Note: *Save Time*, generate this report when the shipment is “Verified—True” at Pitney Bowes.

**REPORTS**

1. Place cursor over Mail Management
2. Click Manifests
3. Click All Manifests in Search Management box
4. Click Posted column heading and click on desired Manifest number; or
5. Filter for posted manifests by either: Manifest ID or Bill of Lading and click Search
6. Click Report for desired Manifest
7. Under Report Options select a group by:
   - BOL
   - Cost Center
   - Reference
   - Product Class
5. Select Optional Columns
6. Click Generate

**JOB STATUS REPORT**

1. Place cursor over Mail Management
2. Cursor over Reports
3. Click Job Status Report
4. Select Report Type:
   - In Progress
   - Shipped
6. Click Generate

**INVOICES**

1. Place cursor over Mail Management
2. Click Invoices
3. Filter for posted manifests by either: Manifest ID, Bill of Lading, Reference, Posted Date Range –or-
4. Place cursor over column heading in manifest box to sort in ascending or descending order.
5. Double click to highlight the desired manifest.
6. Select Draft Invoice or Chargeback Invoice from the Manifest Invoice box.
7. View invoice
8. Click Printer icon to print ***–or-*** select export options

Note: *Save Time*, generate a draft and/or chargeback invoice when the shipment is “Verified—True” at Pitney Bowes.

**ADMINISTRATION**
**Create a New User – *SUPER USER***

1. Place cursor over Administration
2. Click Manage Users
3. Select Company (will default if one company).
4. Type in a User ID (15 character maximum)
5. Type in a Password
6. Repeat Password
7. Type in Email Address
8. Click Next
9. Select Role for New User
   - Data Entry – creates shipping manifests only
   - Accounts Payable – generates reports/invoices only
   - Super User – access to all functions
10. Click Finish

**MANAGE USERS – DELETE / EDIT / CHANGE PASSWORD – *SUPER USER***

1. Place cursor over Administration
2. Click Manage Users
3. View Existing Users list
4. Super User can sort list in ascending/descending order by clicking on column heading – User ID, Email or Creation Date
5. **Delete User:**
   - Click Delete
   - A notification will appear that “user ID” was deleted
6. **Edit User:**
   - Click Edit
   - Edit the email address only
   - To restrict access to the specific account, tick “locked” check box.
   - Click Update or Cancel
7. **Reset Password:**
   - Click Reset Password
   - A notification will appear that the password has been reset to “1234”

**CHANGE MY PASSWORD – ALL USERS**

1. Place cursor over Administration
2. Click Change Password
3. Enter *current* Password
4. Enter *new* Password
5. *Confirm* new Password
6. Click Change Password
7. A notification will appear that the Password has been changed.

**HELP**

**Click on the Green icon in the upper right hand screen to get assistance with the function you are currently navigating.**

**QUESTIONS:**
Contact your Pitney Bowes Customer Service Representative:

- New Jersey: 800-521-0080
- Illinois: 800-356-4467
- California: 800-645-4639



Pitney Bowes

# Post Trac$^{sm}$ Quick Guide

2010

International Services

# Pitney Bowes Post Trac[sm] Quick Guide

**GETTING STARTED**

1. Enter Internet Explorer
2. Training site: http://pt2training.pbims.com
3. Live site: http://posttrac.mailservices.pb.com

**LOGIN**

1. Type in Customer ID
2. Type in User ID
3. Type in Password

**First time login:** Pitney Bowes Terms and Conditions of Service will appear. Please take a moment to review and click Accept to continue.

**PROGRAM SETUP:** ***SUPER USER***

1. Place Cursor over Mail Management
2. Click Configuration
3. *Super User* will select Mail Management settings.

3a **Cost Centers:** *Super User* can opt to display cost centers –or- if the *Super User* does not have cost centers will deselect the “Display” box.

3b **Cost Center Type**: If Cost Centers are displayed the *Super User* will select type of cost center; Publication or Other. (*Other* is non-publication – departments, third-party customers, etc.)

3c **Weight:** *Super User* selects how the weight of the mail is calculated on the manifest in one of two ways:
- **Total**: User will enter total number of pieces and total weight of the pieces –or-
- **Item Weight**: User will enter total number of pieces and enter the weight of one piece. The program will calculate total weight.

3d **Custom Fields:** *Super User* can customize reports by creating independent fields; which can be edited and disabled. **This is not mandatory:**
1. Click Add New Field
2. Custom box will appear. For Publication users, click on the drop down box to select Volume or Issue if desired.
3. Create a Custom Field: Enter name to the right of the Custom box (15 characters maximum)
4. Click Insert to create or Cancel to delete
5. To disable/enable custom field click Edit deselect the Enabled box and click Update
6. To view the fields in reports click Show Custom Fields in Reports
7. Click Apply to save Configuration. Notification will appear that your settings have been saved.
8. Custom Fields cannot be deleted only Disabled

**COST CENTERS:** ***SUPER USER***
**FILE UPLOAD COST CENTERS**

1. Place cursor over Mail Management
2. Click Cost Centers
3. To import a new cost center list click Import
4. A box will appear to locate the excel files with cost centers to be imported
5. Click Download Template
6. User can choose to Open or Save Excel template
7. Fill out all pertinent fields
8. Save
9. Click Browse and Upload the newly created cost center template

**CREATE MANUAL COST CENTERS:** ***SUPER USER***

1. Place cursor over Mail Management
2. Click Cost Centers
3. Click Create New Cost Center
4. For **Publication Cost Centers** click on Publication box
   a. Click on Account drop down
   b. Click Title drop down box and select. Note Title will also appear in Description box.
   c. Click on Pub ID
   d. If Titles need to be added select Create New Publication
   e. Enter name of publication in Title field
   f. If title already exists a message will appear indicating so. Note Title will also appear in Description box.
   g. Enter Pub ID — 5 character maximum
   h. Description—Edit if desired
   i. Active Date: key enter or click on calendar for date cost center to be activated.
8. Mark up – Select
   a. None
   b. Percentage of Cost
   c. Add to Cost
   d. Fixed Cost
      If applicable:
      - Enter Per Piece Value
      - Enter Per Pound Value
   K. Click SAVE

1. Enter ID: 25 character maximum
2. Enter Description: 30 character maximum
3. Select Customer
4. Select Cost Center Item or Create New Item
   a. Create New Item (Department/Third Party Customer/Publication Title):
   b. Click Select Cost Center
   c. Click Create New Item
   d. Type: Enter item name (20 character maximum)
   e. ID: Enter ID (20 character maximum)
   f. Description: (50 character maximum)
   g. Click Create
8. Click calendar for Active Date
9. Mark up – Select
   a. None
   b. Percentage of Cost
   c. Add to Cost
   d. Fixed Cost
      If applicable:
      - Enter Per Piece Value
      - Enter Per Pound Value

**EDIT COST CENTERS:** ***SUPER USER***

1. Place cursor over Mail Management
2. Click Cost Centers
3. View Existing Cost Centers
4. Filter Cost Centers: Enter ID or Description (full or partial)
5. Cost Centers can be sorted by heading: Place cursor over column heading and double click to sort.
6. Cost Centers can be activated or deactivated. Follow step 4 or 5 above. Click Activate or Deactivate.
7. Cost Center Descriptions can be edited. Follow step 4 or 5 above. Click Edit to revise the Description. Click Save Cost Center.
8. Cost Center Markups cannot be edited with the same CB ID You must deactivate the cost center; create a new one with the same CB ID and apply the appropriate markups.

**HIDE INACTIVE COST CENTERS:** ***SUPER USER***

1. Place cursor over Mail Management
2. Click Cost Centers
3. View Existing Cost Centers
4. Click “Hide Inactive” check box.

**CREATE BILL OF LADING (BOL)**

1. Place cursor over Mail Management
2. Click BOL Creation
3. Select Account Code.
4. Select Pickup Location
5. Enter Customer Billing Reference — indicating what the shipment consists of. Will appear on Pitney Bowes invoice.
6. Enter Authorized Party—Agent to transport shipment
7. Enter Total Shipped Boxes
8. Enter Total Number of Pieces
9. Enter Total Weight of Shipment
10. Check box if pieces are Identical Weight
11. Piece Weight will be auto calculated when identical weight is checked.
12. If **Publication**, click box.
13. Select Publication title from down box
14. Enter Volume
15. Enter Issue
16. Select Service required
17. Select Value Added Services (if applicable)
18. Click Submit, or Clear to start over
19. Click Printer icon to print BOL and pack with shipment

Note: A Posted BOL cannot be revised. If a BOL is posted unintentionally, contact your Pitney Bowes Customer Service Representative immediately.

**BOL MANAGEMENT—to view/print posted BOL**

1. Place cursor over Mail Management
2. Click BOL Management
3. Search in 3 ways:
   a. Enter Bill of Lading number and click Search;
   b.Enter Reference and click Search; or
   c.Enter Date Posted or Range and click Search

***Locate a Posted BOL -- FASTER***

1. Place cursor over Mail Management
2. Click BOL Management
3. Filter for Posted BOL’s by clicking on a column heading to sort in Ascending/Descending Order: BOL, Entered By, Customer, Reference, Date Posted, Pieces, Piece Weight, Total Weight, Product Class

**CREATE MANIFESTS**

1. Place cursor over Mail Management
2. Click Manifests
3. Click Create Manifest
4. If User has Cost Centers: Select Account from drop down box or All Cost Centers if applicable
5. User can find cost centers by Scroll bar, enter data in fields to filter cost centers, or click on column heading for ascending/descending cost centers.
6. Double click on desired cost center. Will be highlighted in green.
7. If User has Additional Fields: View Additional Fields box
8. User must enter information to the additional field boxes.
9. .**Add entries**: Select Product Class
10. Select Country
11. Enter pieces and weight previously configured. See Program Setup 3c above
12. Reference is not a mandatory field; but can be filled in if desired
13. Select Value Added Services if applicable
14. Click Remove to clear the fields and restart entry process.
15. Click Add Entries if fields are complete.