



PostBase



**Remoteone
Reportone**

User Manual

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1 Introduction

About this User Manual

This User Manual assumes that both PostBase and RemoteOne / ReportOne have already been installed and are now operational.

Information on available product variants and country-specific particularities can be found in the Addendum to the User Manual (*if available in your country*).

Target group	Users of this software should have basic knowledge of Windows. They do not need special computer skills.
Topics	The present manual provides a comprehensive overview of the software and describes how to perform daily routine tasks.
[Management]	Names of buttons are given in square brackets.
<i>TIP / additional information</i>	Tips for improving the operation or additional information appear in italics.
Product logo	In this manual, the product names appear in their plain form, e. g. 'ReportOne'.

What is PostBase RemoteOne / ReportOne?

PostBase RemoteOne / ReportOne are user-friendly PC applications enabling you to set up, maintain and use your PostBase mailing system.

With , you are able to perform your mailing system's basic functions directly on your computer. It also enhances functionality and provides possibilities in addition to those available at the mailing system. includes all these functions and additionally offers the transactions and reports features.

TIP: To download PostBase RemoteOne / ReportOne, please visit our web portal.

In this User Manual, the term 'The software' will be used whenever a feature is available at both RemoteOne and ReportOne. In some illustrations, a ReportOne screen is shown on behalf of the other software versions.



**Application areas
(examples)**

- Adjust the meter imprint
- Start metering
- Load postage
- Create shortcuts
- Manage cost accounts
- Manage advertising imprints
- Manage user and access rights
- Print reports (only ReportOne)
- Display and export transactions (only ReportOne)
- Change system settings of PostBase

**System
requirements**

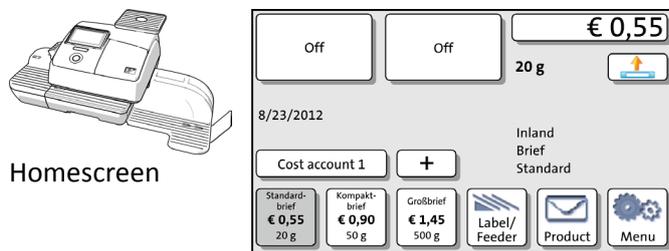
- Windows XP / Windows Vista / Windows 7
- Processor: Pentium min 1000 MHz
- Screen resolution: min 800 x 1210 (height x width)
higher resolution is recommended
- RAM: min 1 GB
- Empty hard drive space: min 1.5 GB
- Adobe Reader

2 Start / exit the program

2.1 Start and connect with PostBase automatically

Note: If you work with this program for the first time, you first have to make some elementary settings. For further details refer to the [Software settings](#) in the [Appendix](#).

First make sure that the software is installed and the PostBase is connected to your PC. PostBase must show the Homescreen as shown in the example below.

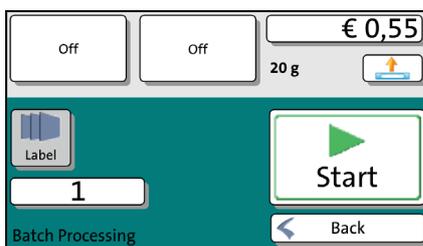
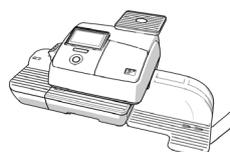
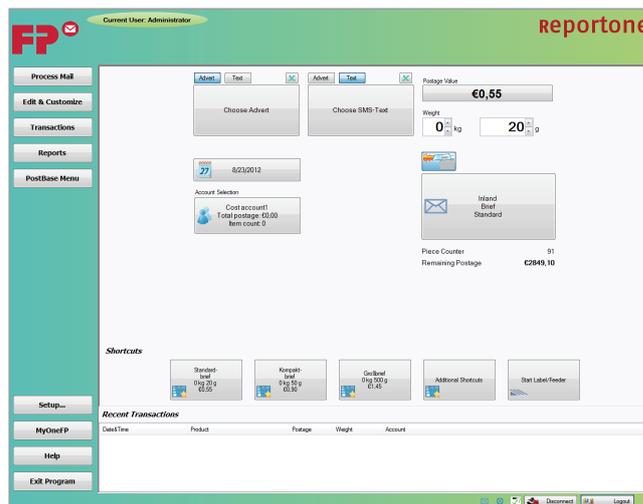


Homescreen

Starting RemoteOne / ReportOne

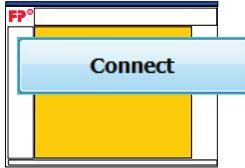


Double click the PostBase icon on your desktop to start the program. When opening, it automatically establishes a connection to PostBase. The software shows the screen below after connecting.

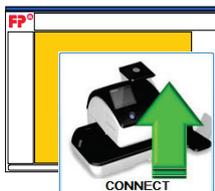
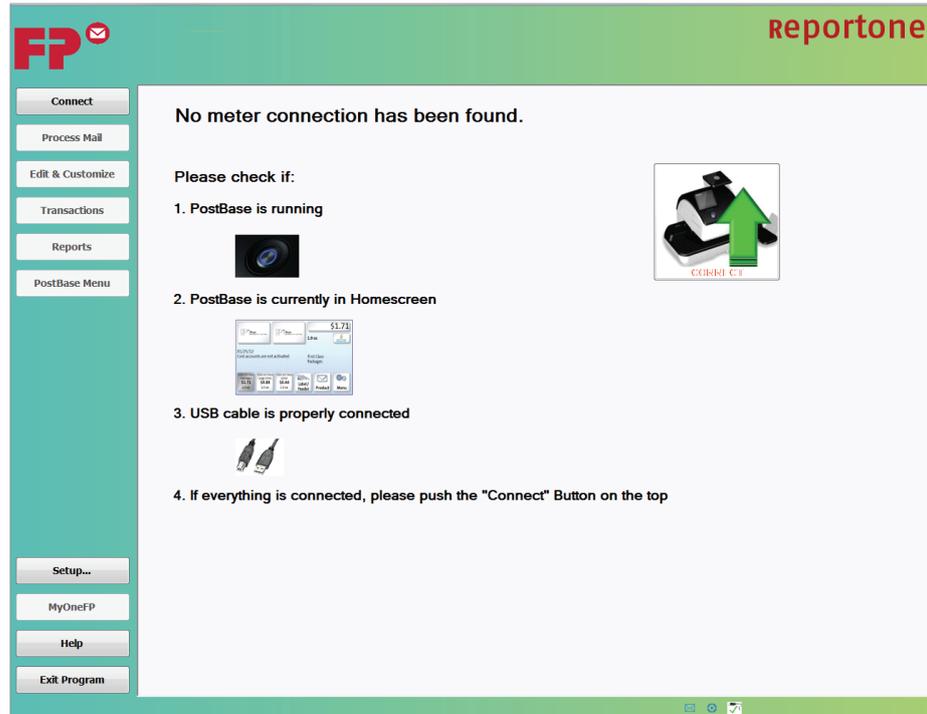


When PostBase is connected to the software, it shows a screen like this.

2.2 Connect RemoteOne / ReportOne and PostBase manually



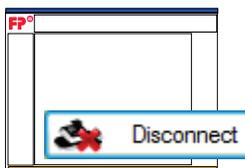
If connection does not work, RemoteOne / ReportOne shows the following screen.



Check if PostBase shows the Homescreen. Click the [Connect] button in the working area.

Note: If The software does not show this screen, click the [Connect] button in the main menu.

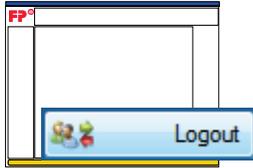
2.3 Disconnect PostBase and exit



Click [Disconnect] in the status area to terminate the connection with the mailing system.

The connection to the mailing system is terminated and PostBase shows the Homescreen. You can now use PostBase without The software.

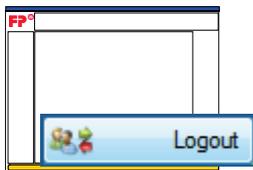
2.4 Log out PostBase user



Click the [Logout] button in the status area to log the current user out.
Confirm the security prompt. The connection is terminated.

The PostBase display shows the login screen where you can select another user.

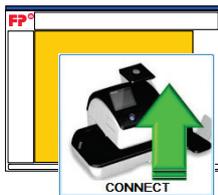
2.5 Change PostBase user



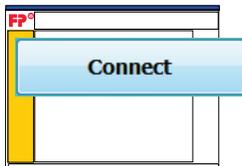
Click the [Logout] button in the status area and confirm the security prompt.

The connection between The software and the mailing system is terminated.
PostBase changes to the login screen.

On the mailing system, select the desired user and enter the PIN.



Check if PostBase shows the Homescreen.
Click the [Connect] button in the working area.



If necessary, click the [Connect] button in the main menu.

*TIP: The current user is displayed in the secondary menu of the The software window.
Depending on the user profile, info on available postage credit is also displayed.*



2.6 Exit RemoteOne / ReportOne

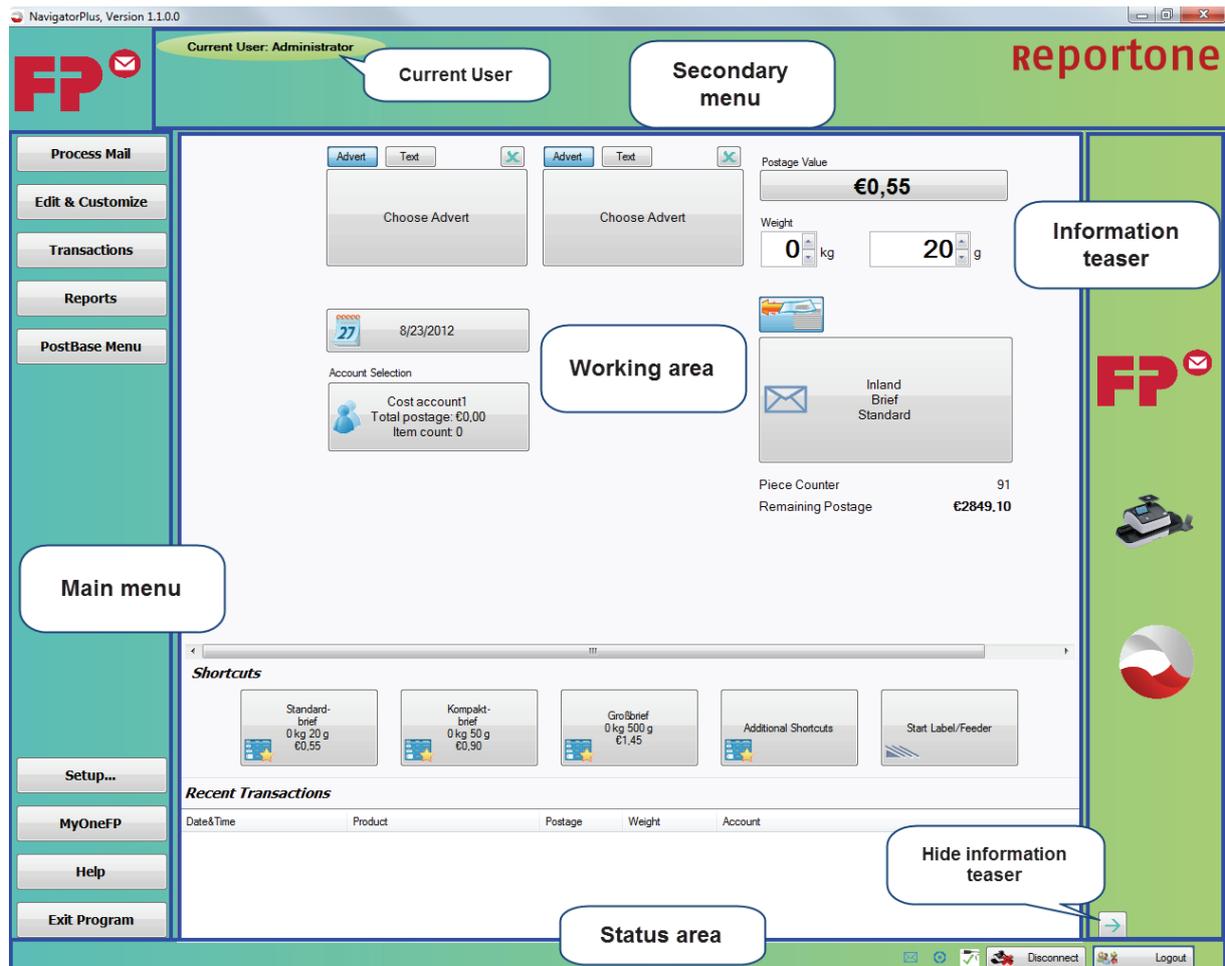


If you want to exit the software, click [Exit Program] on the main menu or the [x] button on the top right corner.

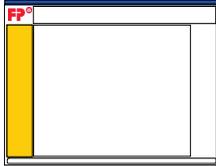
The connection to the mailing system is terminated and PostBase shows the Homescreen.

3 The user interface

You will first receive a short overview of your software's user interface. In the following chapters, the individual areas will be explained in detail.



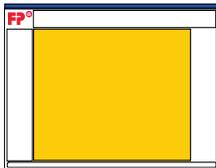
3.1 The main menu



From the main menu, you get to the menus [Process Mail], [Edit & Customize], [Transactions], [Reports] and [PostBase Menu] by clicking on the corresponding button. You can also call the [Setup...], [MyFP Access] and [Help] functions. The selected menu will appear in the working area.

The [Exit Program] button closes the program.

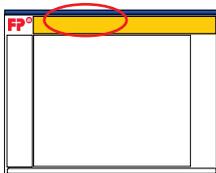
3.2 The working area



The active menu appears in the working area. In order to make it easier for you to switch between software and PostBase, the working area was designed on the basis of your mailing system's display.

The information teaser to the right of the working area provides you with up-to-date information on FP.

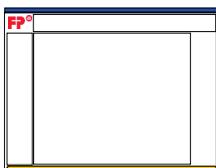
3.3 The secondary menu



The secondary menu provides additional functions for the active menu in the working area.

If user management is active, the current user and, where applicable, the available postage credit are displayed on the left side.

3.4 The status area



The status area provides, inter alia, information on the connected mailing system and on current processes.

3.5 Buttons and other elements (selection)

Buttons and input elements



save

Save an entry (e.g. a new text message).



cancel

Reject an entry.

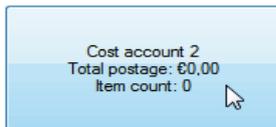


clear / delete

According to context:

- Remove from selection (text / advert).
- Delete (e.g. shortcut or text message).
- Clear data (e.g. reset piece counter or cost account to zero).

Note: Depending on the selected color scheme, button colors may vary.



Selection field

When you click on a selection field, the software immediately adopts your selection. Example: Cost account selection.



Button for moving fields

Click on this button and hold the mouse button down. You can now drag a selection field to another position.



Arrow buttons

Click to increase or reduce the displayed value gradually.

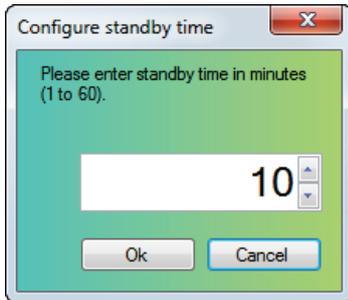


Input Boxes

Enter texts directly via PC keyboard.

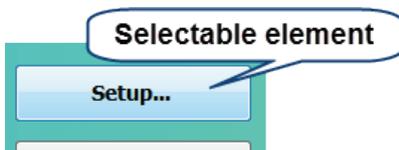


For the input of values, you can use the arrow buttons as well as the PC keyboard.

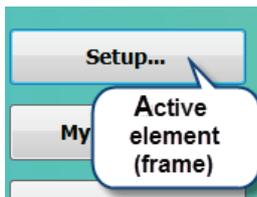


Example: Standby time.

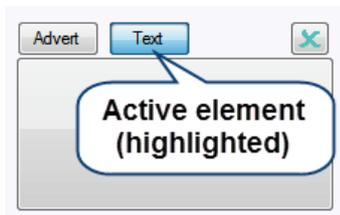
Status display for buttons



Selectable elements turn blue as you scroll your mouse over them.



If a button is active, it is highlighted in blue or it is framed with a blue boarder.

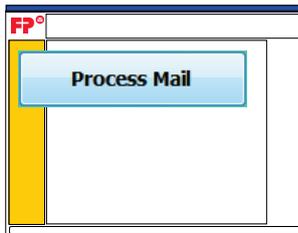


Software navigation

If you want to exit a menu, click on a button leading you to another menu. There is no 'Back' function.

4 Overview of the main menu functions

4.1 Mailing



- Services
- Weight
- Advert/Text
- Account
- Change date

Meter settings

You can easily define meter settings from your PC. These include product settings (services and weight) as well as selecting a text message and / or an advert. Furthermore, you can select an account and adjust the date of postage. (Regarding the postal regulations, predating is possible.)

(For further information, see chapter [Meter settings](#).)



Differential weighing

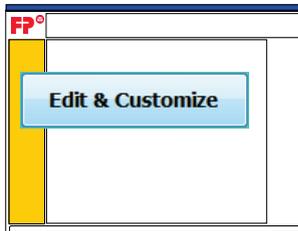
Weigh and meter larger volumes of similar mail pieces quickly and conveniently.



Metering

Start the metering process directly from your PC.

4.2 Management



Manage text messages

You can enter texts via PC keyboard and store up to twelve different text messages. You can access all stored texts from PostBase. (For further information, see chapter [Manage texts.](#))



Manage shortcuts

The software offers shortcuts which can store frequently used product settings. You can set three or four shortcuts for PostBase. The program itself even features 20. You can sort, delete, overwrite and rename shortcuts.

(For further information, see chapter [Manage shortcuts.](#))



Manage accounts

The software shows you all existing accounts. It provides information about the accounts themselves, their postage consumption and number of meter imprints performed since the last reset. You can manage the accounts on your PC or set them to zero.

(For further information, see chapter [Manage accounts.](#))



Manage adverts

Download adverts from the FP Portal or create individual ones with the PostBase Advert Designer (see chapter [Manage adverts.](#))



Manage users (Administrator only)

As Administrator, you can create users, set individual access rights for the respective users of the mailing system, view and change user profiles, and delete users (for detailed information, refer to chapter [Manage users.](#))

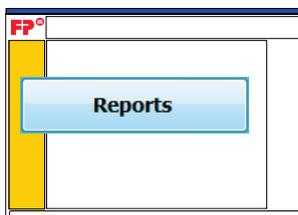
4.3 Transactions (only ReportOne)



The 'Transactions' menu gives you a full picture of all your mailing activity. Transactions are used to generate reports. Comprehensive search functions are provided.

(For more detailed information, see chapter [Transaction administration](#).)

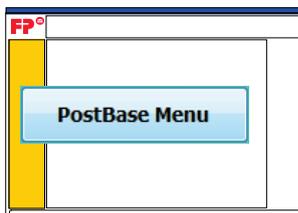
4.4 Reports (only ReportOne)



ReportOne enables you to generate different types of reports, e.g. account reports.

(For more detailed information, please refer to chapter [Reports](#).)

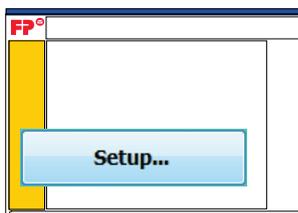
4.5 PostBase mailing system



The 'PostBase Menu' enables you to make settings on the PostBase mailing system. You can, for example, view or reset the piece counter. You also find special functions like 'Print Advert Only' in this menu.

(For more detailed information, see chapter [PostBase Setup and special functions](#).)

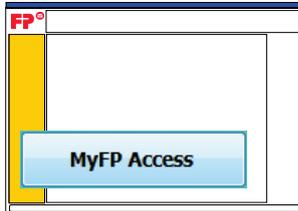
4.6 Software Settings



Define software settings, e.g. for printing reports.

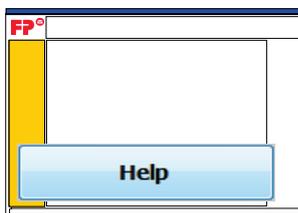
(For more detailed information, see [Appendix](#).)

4.7 Connection to Francotyp-Postalia



The PC program sets up a connection to Francotyp-Postalia's web portal. Through your account, you can order for example accessories for your PostBase and manage adverts.

4.8 Help

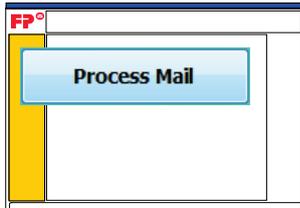


If you run into problems while working with the program, click [Help] to review this User Manual.

If the help function shouldn't be sufficient to solve your problems, please consult the FP web page or contact Francotyp-Postalia.

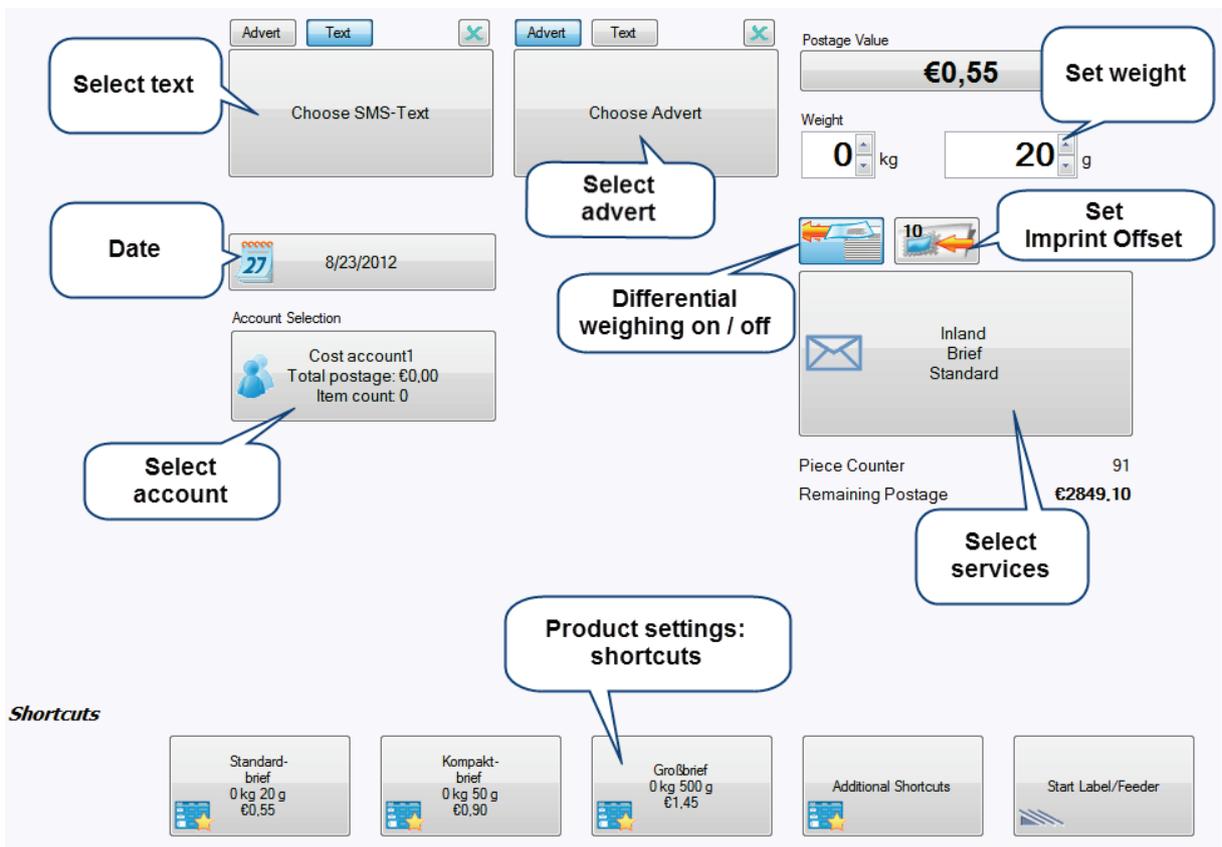
5 Meter settings

5.1 Overview



In the 'Process Mail' menu, you find your mail's characteristics.

The software synchronizes settings with PostBase when setting up a connection to the mailing system. The next section describes how to change the different settings.



The screenshot shows the 'Process Mail' settings interface with several callouts:

- Select text**: Points to the 'Choose SMS-Text' field.
- Date**: Points to the date field showing '8/23/2012'.
- Select account**: Points to the 'Account Selection' area showing 'Cost account1', 'Total postage: €0,00', and 'Item count 0'.
- Select advert**: Points to the 'Choose Advert' field.
- Postage Value**: Points to the '€0,55' value.
- Weight**: Points to the '20 g' value in the weight field.
- Differential weighing on / off**: Points to the '10' value in the differential weighing field.
- Set weight**: Points to the weight field.
- Set Imprint Offset**: Points to the '10' value in the imprint offset field.
- Select services**: Points to the 'Inland Brief Standard' service selection.
- Product settings: shortcuts**: Points to the 'Großbrief' shortcut in the 'Shortcuts' section.

Shortcuts

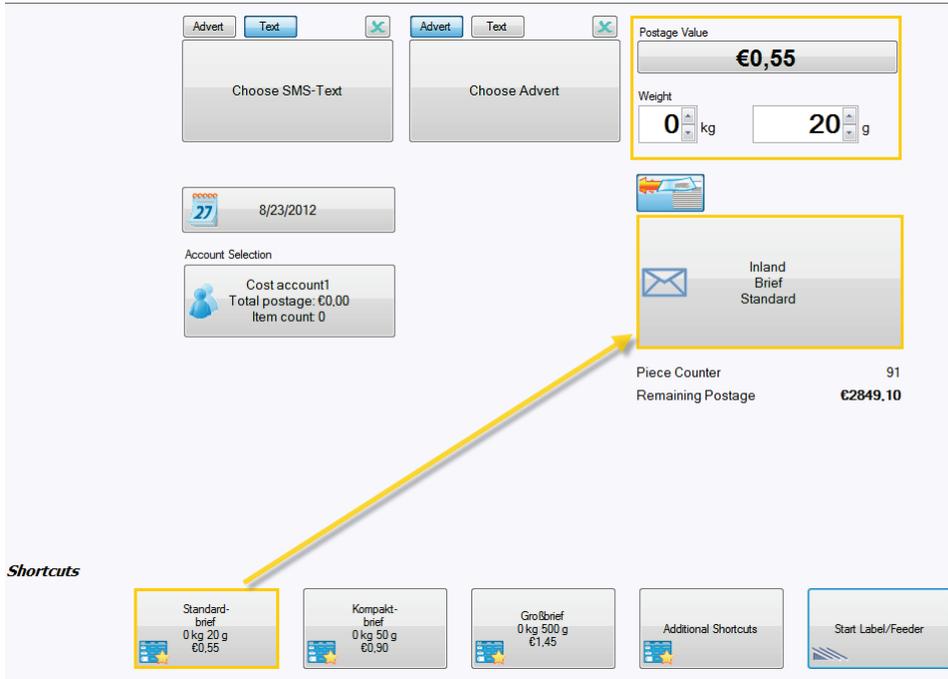
Product	Weight	Price
Standard-brief	0 kg 20 g	€0,55
Kompakt-brief	0 kg 50 g	€0,90
Großbrief	0 kg 500 g	€1,45

Additional Shortcuts: Additional Shortcuts, Start Label/Feeder

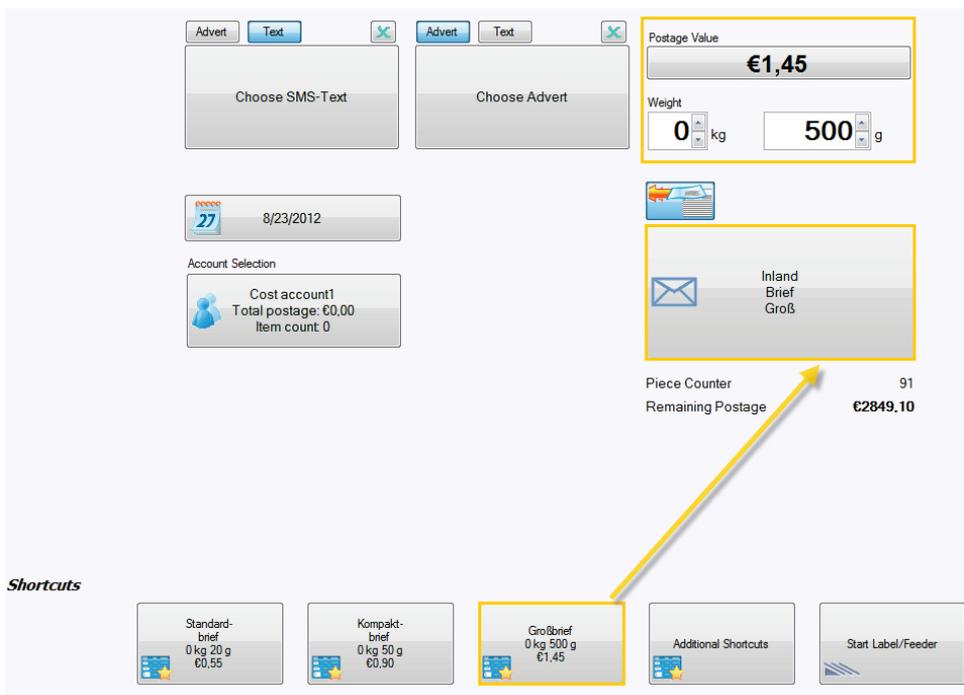
Piece Counter: 91
Remaining Postage: €2849,10

5.2 Product setting: Shortcut

The software directly offers the first three shortcuts in its 'Process Mail' menu. Click on [Additional Shortcuts] to open the menu 'Product shortcuts'. This menu displays all available shortcuts.



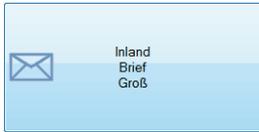
Select the desired shortcut. The software applies the product settings.



Note: If you want to edit shortcuts or create a new one, see chapter [Manage shortcuts](#).

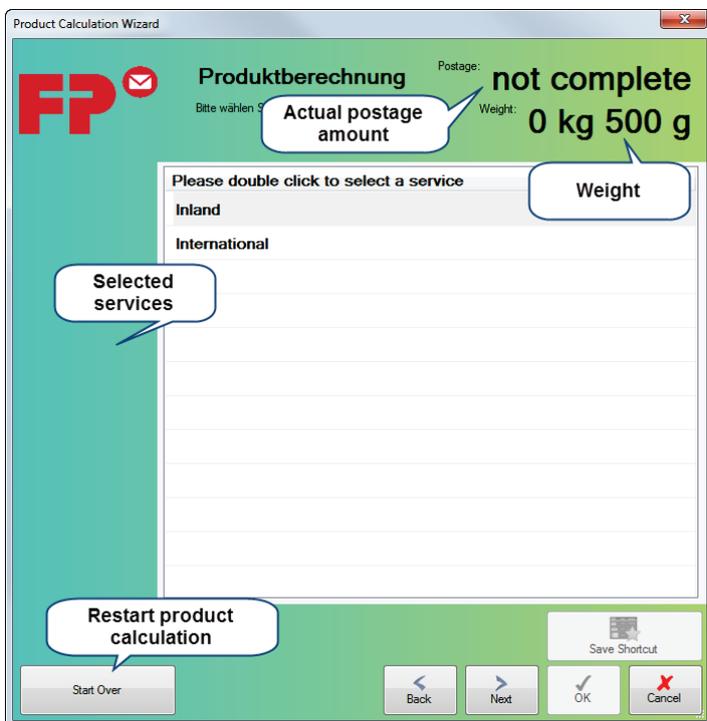
5.3 Product setting: Select services and set weight

Select services



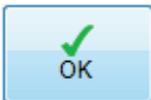
Click on the field for selecting services to set a product.

The software opens the Product Calculation Wizard. On the left-hand side of the window, you see all selected characteristics. Postage amount and set weight are displayed on the top right corner.

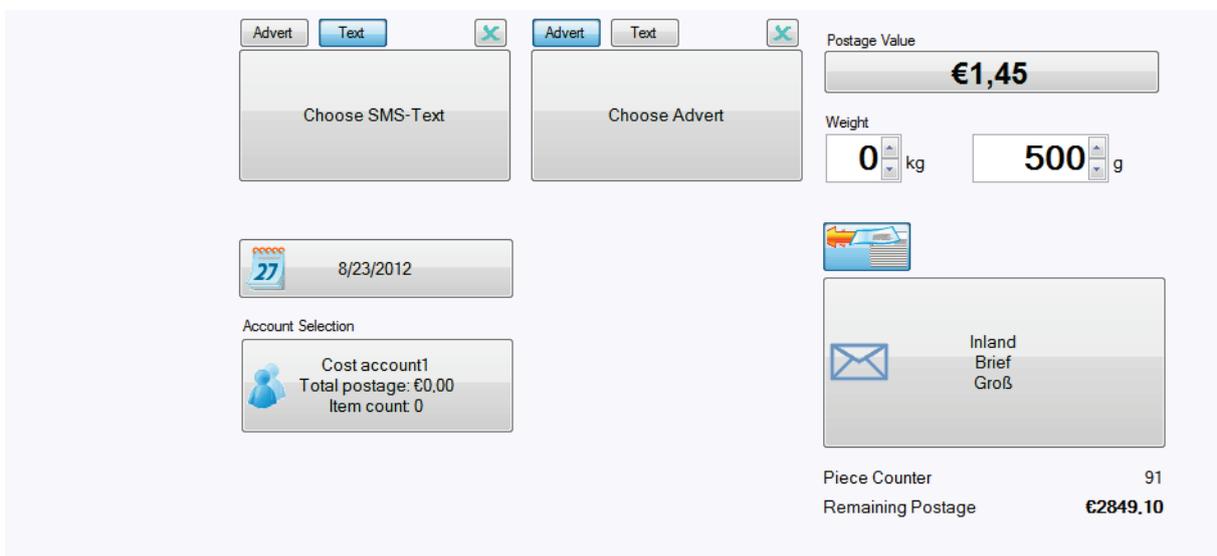


Select a service and click on the [Next] button. The program adopts your selection, offering further services. Select all desired services in this way.

TIP: Instead of selecting the [Next] button, you can also double click on the desired service.



Click [OK] to confirm. The Product Calculation Wizard closes. Your desired product has been set for metering.



Set weight

Place the mail piece on the PostBase weighing platform to determine the piece's weight.

*TIP: In the 'Process Mail' menu, you can manually enter a weight value.
(See next chapter [Set weight.](#))*

5.4 Set weight

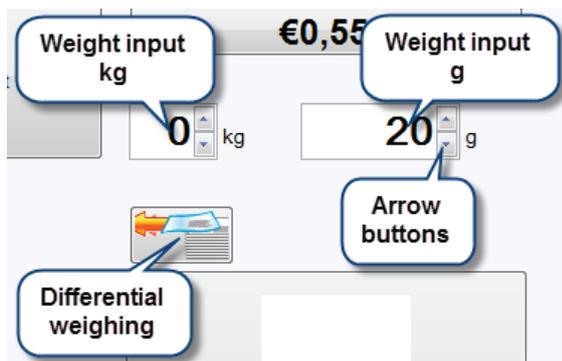
5.4.1 Using the internal scale in normal mode

If you place the mail piece on the PostBase weighing platform, the program automatically transfers the weight value. In this case, you do not need to enter it manually. If you use the shortcut function, there is a preset weight value.

5.4.2 Manual input

However, it is sometimes necessary to use the PC program to enter a weight value, e.g. if your mail piece should exceed the allowable weighing range.

There are two input boxes (kilogram and gram) for the weight of the mail piece. Click on the input box to enter a weight via PC keyboard. You can also set the weight by arrow buttons.



5.4.3 Using the internal scale in differential weighing mode

The differential weighing feature helps you save time weighing and metering large amounts of similar mail pieces. Mail pieces can easily be weighed by taking them from the letter stack on the weighing platform one at a time. PostBase then calculates the difference in weight, i.e. the individual weight of each letter automatically.

Note: Please observe the postal regulations regarding the dimensions of the mail piece.



Click on the button with the 'Differential weighing' symbol to activate or deactivate this feature.



Postage Value
€0,55

Weight
0 kg 20 g

Differential weighing ON: The software displays the mail piece's weight after removing it from the weighing platform.

- Place the letter stack on the weighing platform. For now, the previous weight and the previous postage value are still displayed.

Postage Value
€0,55

Weight
0 kg 15 g

- Take one mail piece from the stack.
- The software displays weight and postage amount of this mail piece.
- Meter as described in chapter [Metering](#).
- Repeat this procedure with the other mail pieces.

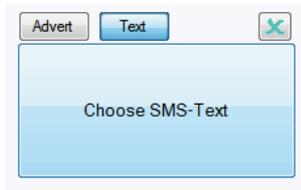
When the weighing platform is empty, PostBase asks you whether you want to use the most recent weight.



Differential weighing OFF: The software displays the mail piece's weight after putting it on the weighing platform.

Note: For more detailed information on differential weighing, please refer to the PostBase Operator Manual (Reference Guide).

5.5 Select text message



Click on the field for selecting text messages.

The 'Sms texts' menu opens in the lower part of the working area. It displays all available text messages.

A screenshot of the PostBase interface. The top part shows two 'Choose SMS-Text' and 'Choose Advert' buttons. To the right, there are fields for 'Postage Value' (€0,55), 'Weight' (0 kg and 20 g), and 'Inland Brief Standard' with a piece counter of 91 and a remaining postage of €2849.10. Below this, there is an 'Account Selection' section showing 'Cost account1' with a total postage of €0.00 and an item count of 0. At the bottom, there is a 'Sms texts' section with three buttons: 'Happy New Year!', 'Seasons Greetings', and 'Best wishes!'. A 'Manage' button and a downward arrow are also visible in the bottom right corner.



Select the desired text. The program adopts a text message closing the 'Sms texts' menu.

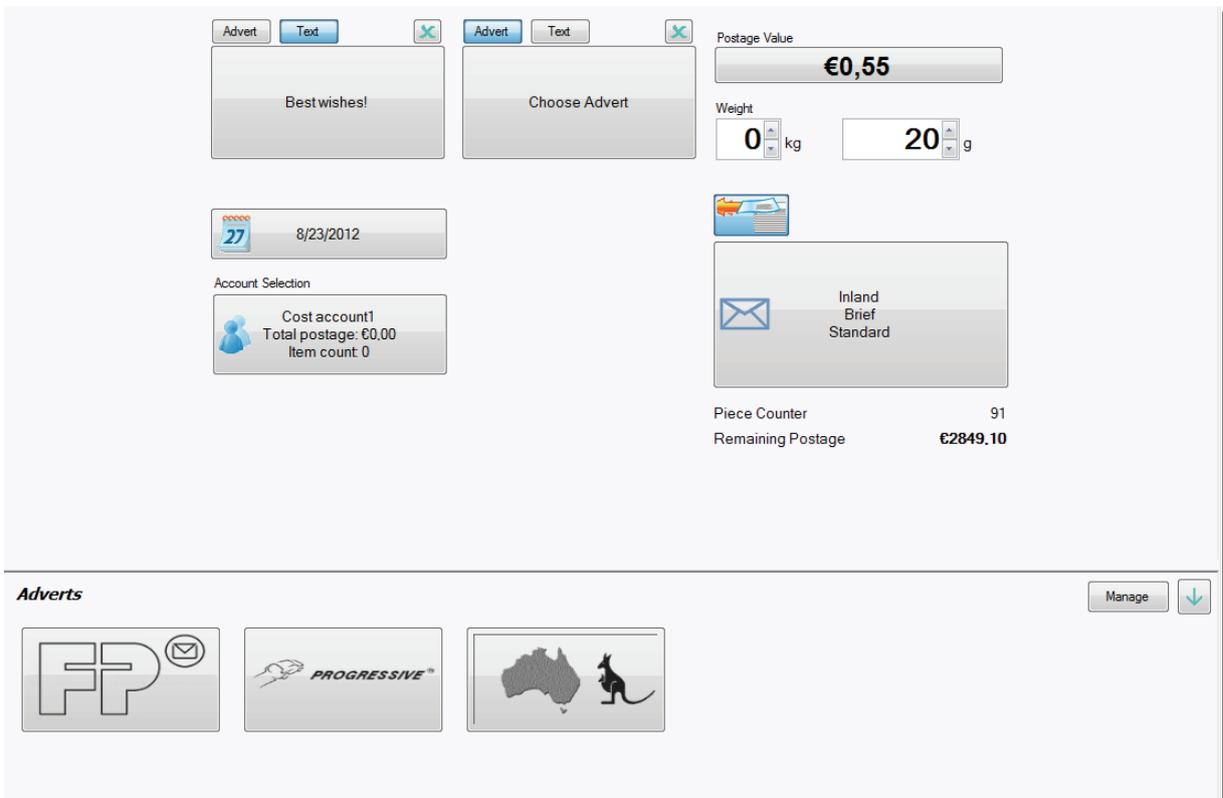
The screenshot displays the 'Meter settings' interface. At the top, there are two tabs: 'Advert' and 'Text'. Below the tabs, there are two main panels. The left panel shows a selection of text messages, with 'Best wishes!' highlighted. A callout box with the text 'Remove from selection' points to a small 'x' icon in the top right corner of this panel. The right panel shows a selection of advertisement types, with 'Inland Brief Standard' highlighted. Below the panels, there are several status indicators: a date '8/23/2012', an 'Account Selection' box showing 'Cost account1', 'Total postage: €0,00', and 'Item count: 0', a 'Postage Value' of '€0,55', a 'Weight' of '0 kg' and '20 g', a 'Piece Counter' of '91', and a 'Remaining Postage' of '€2849.10'.

5.6 Select advert



Click on the field for selecting adverts.

The 'Adverts' menu opens in the lower part of the working area. It displays all available advertisings.



TIP: If you click [Manage], you have the possibility to download adverts from the FP portal.



Select the desired advertising. The software adopts an advert closing the 'Adverts' menu.

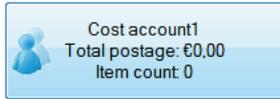
The screenshot displays the PostBase software interface. At the top, there are two 'Advert' buttons with 'Text' sub-buttons and close icons. The left 'Advert' button is selected, showing a 'Bestwishes!' message. The right 'Advert' button is also selected, showing the 'FP' logo with an envelope icon. A blue callout box with the text 'Remove from selection' points to the close icon of the right 'Advert' button.

On the right side, the 'Postage Value' is set to €0,55. The 'Weight' is set to 0 kg and 20 g. Below this, there is a button for 'Inland Brief Standard' with an envelope icon. At the bottom right, the 'Piece Counter' is 91 and the 'Remaining Postage' is €2849.10.

At the bottom left, there is a 'Shortcuts' section with five buttons:

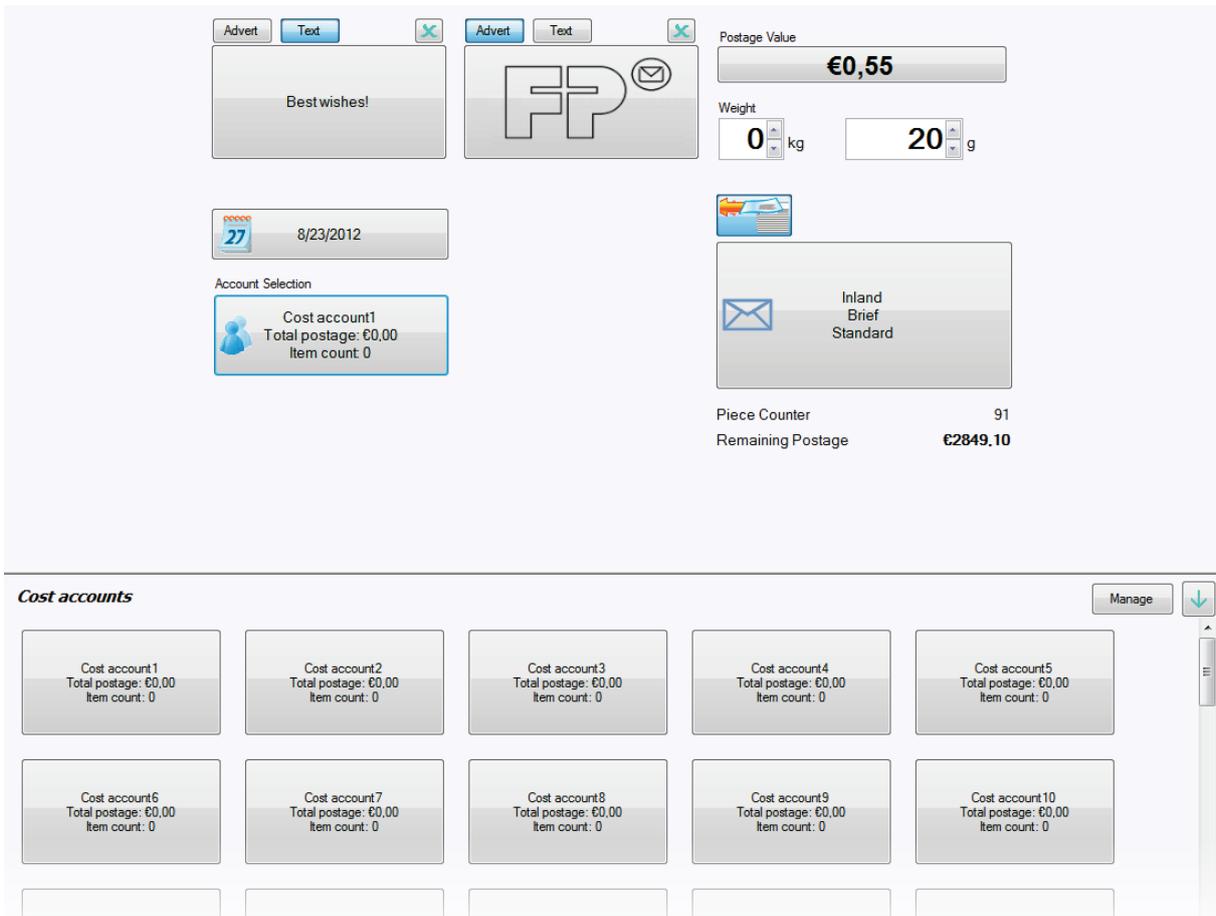
- Standard-brief: 0 kg 20 g, €0,55
- Kompakt-brief: 0 kg 50 g, €0,90
- Großbrief: 0 kg 500 g, €1,45
- Additional Shortcuts
- Start Label/Feeder

5.7 Select account



In the 'Process Mail' menu, the field for selecting accounts shows you the name of the active account. It also displays postage consumption and number of performed meter imprints. Select this field to change the account.

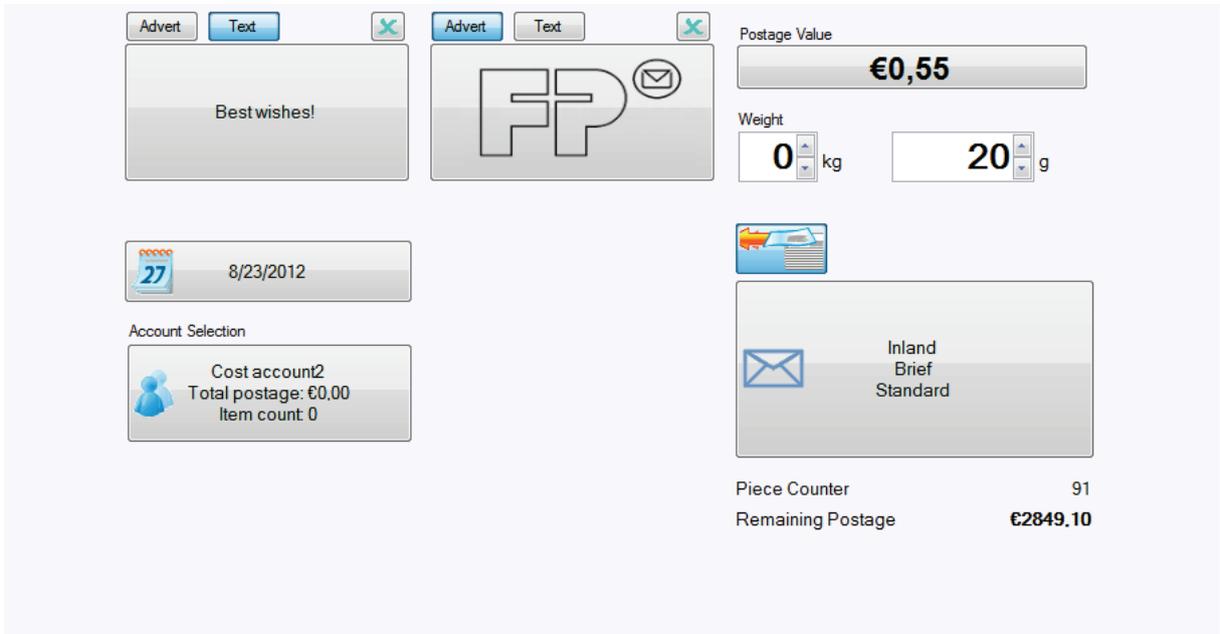
The 'Cost accounts' menu opens in the lower part of the working area. It displays all available accounts.



With the [Manage] button, you can directly jump to the account administration.

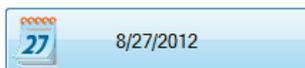


Select the desired account. The software adopts your selection closing the 'Cost accounts' menu.

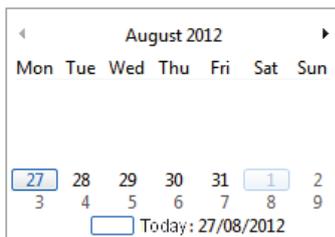


Note: If you need information on how to manage cost accounts, please refer to chapter [Manage accounts](#).

5.8 Set date

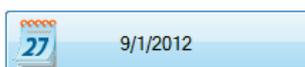


Click on the button displaying a date in the 'Process Mail' menu.



The software opens a calendar window. It displays the allowable predating range. At the bottom of the window, you see the actual date.

Click on the desired date.



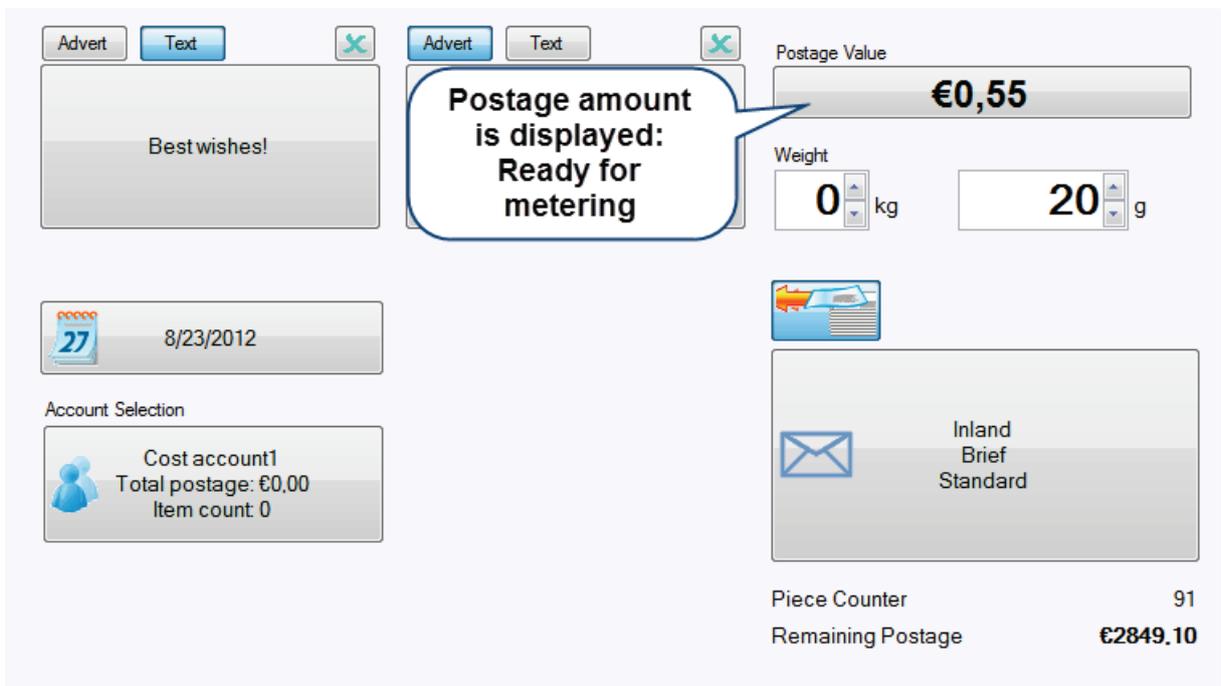
The new date of postage appears in the 'Process Mail' menu.

5.9 Metering

A postage amount in the right top corner of the 'Process Mail' menu indicates: PostBase is ready for metering. Before you start metering, check if all characteristics displayed are correct.

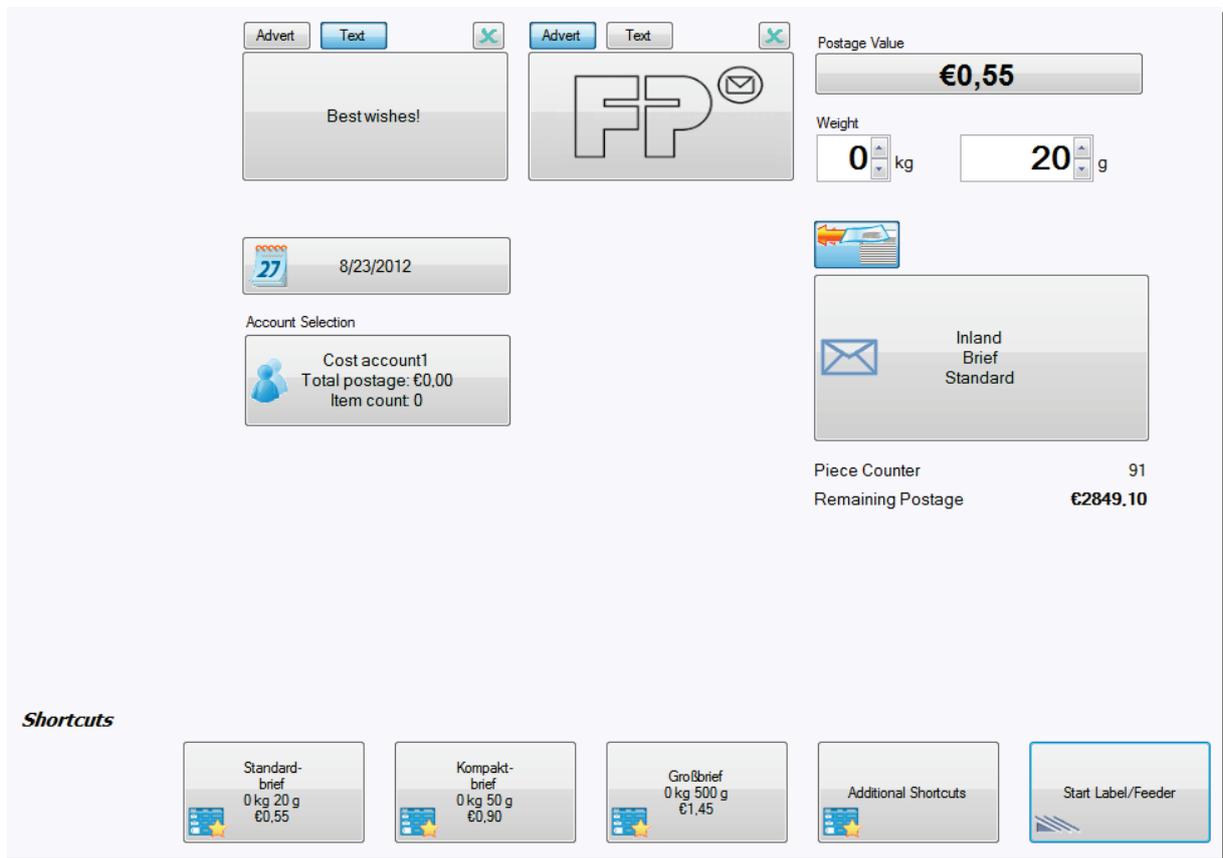
5.9.1 PostBase without Label dispenser / Automatic Feeder

The software shows a screen as shown below. Place a mail piece on the hand feed tray to start the metering process.



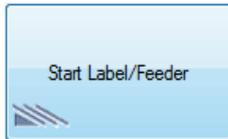
5.9.2 PostBase with Label dispenser / Automatic Feeder

The software shows a screen as shown below.



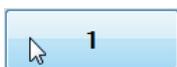
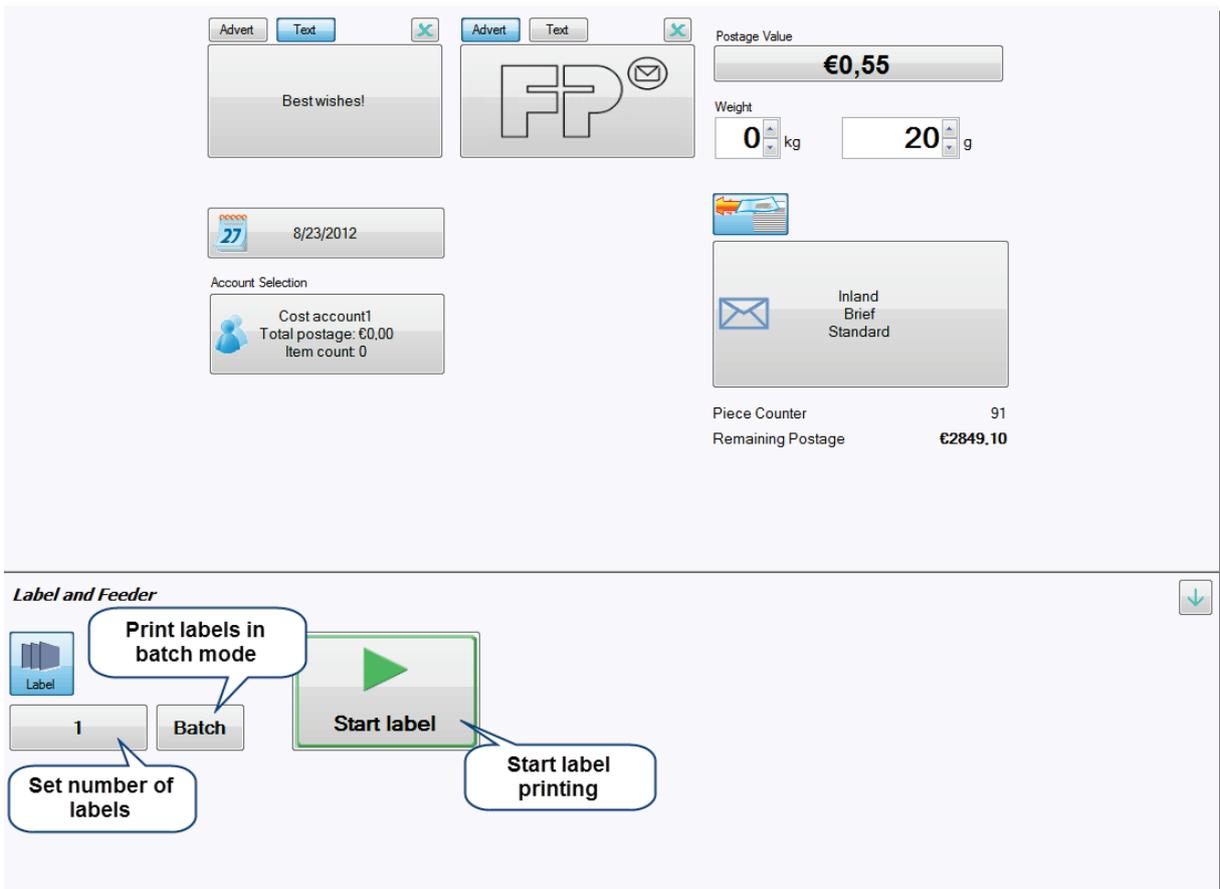
There are the following possibilities for starting the metering process:

- Place a mail piece on the hand feed tray or automatic feeder.
- Start label printing from your PC using the [Start Label/Feeder] button.
- Start batch processing from your PC using the [Start Label/Feeder] button.
- Start label printing on the PostBase.
- Start batch processing on the PostBase.



Click on the [Label/Feeder] button to start metering from your PC. (The following example shows a menu for PostBase with label dispenser and without feeder.)

The 'Label and Feeder' menu opens in the lower part of the working area.



Click the button that shows the set number.



Type in the desired target count via PC keyboard.

You can also enter figures using the arrow buttons.

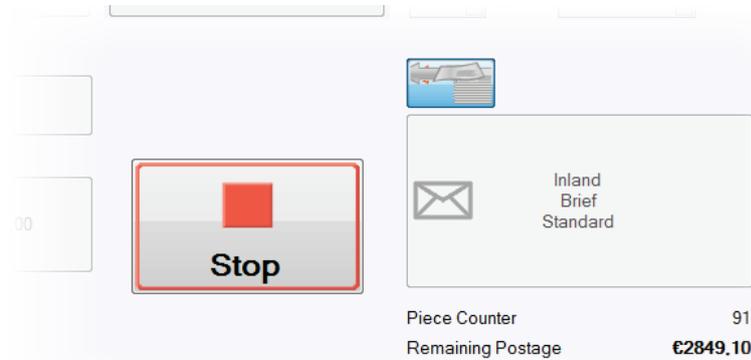


Save your entry.

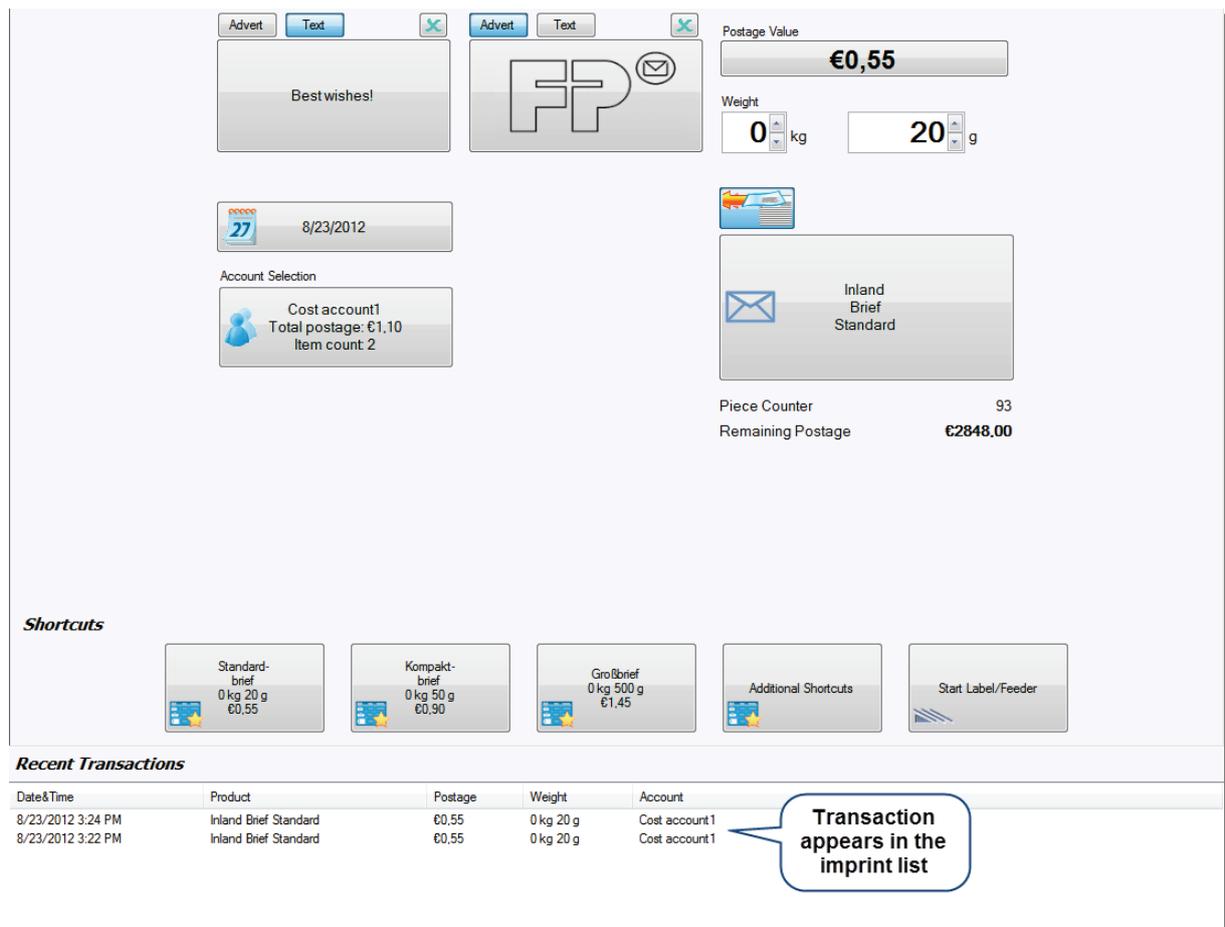


When you have set the desired number of labels, click on [Start label] to start label printing.

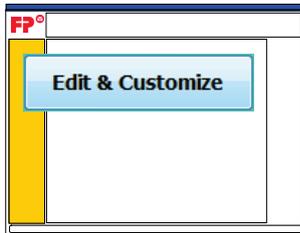
During operation, the following window is shown.



When the metering process is complete, the 'Process Mail' menu appears in the working area again. The metering appears in the imprint list.

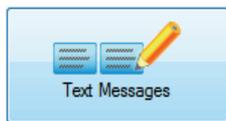


6 Manage texts

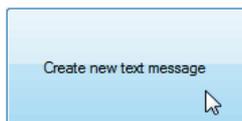


In the 'Edit and Customize' menu , you have the possibility to manage text messages.

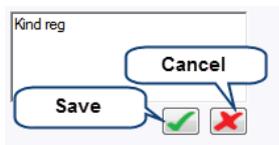
6.1 Enter a new text



Select [Text Messages].



Click on [Create new text message].



You can now enter a text of your choice.

Save your entry. You can store up to 12 different text messages.

You can now select the new text in the 'Manage Text Messages' menu.



6.2 Edit or delete a text

Edit a text



Select [Text Messages].



Click on the text you want to edit.



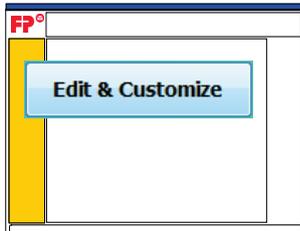
The software opens an input box for text. Enter a new text.

Delete a text



Click [x] button in the upper part right of the text.

7 Manage shortcuts

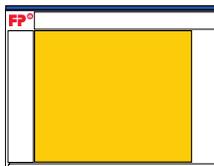


In the 'Edit and Customize' menu, you can manage shortcuts.

7.1 Create new shortcut



Select [Shortcuts].



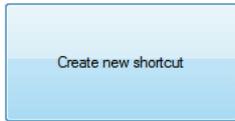
All shortcuts appear in the working area.

Manage shortcuts (Drag and Drop into the blue box to synchronize.)

7 of 20 shortcuts defined

Standard-brief 0 kg 20 g €0.55	Kompakt-brief 0 kg 50 g €0.90	Großbrief 0 kg 500 g €1.45	Maxbrief 1 kg 0 g €2.20
Bücher Inland 0 kg 20 g €0.45	Postkarte Inland 0 kg 4 g €0.45	Einschreiben/ Rueckschein 0 kg 20 g €4.40	Create new shortcut

TIP: If you want to define a weight for your new shortcut, set a weight in the 'Process Mail' menu.

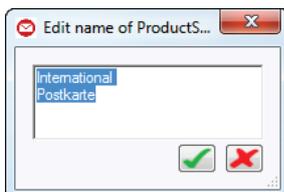


Click on [Create new shortcut].

The software opens the Product Calculation Wizard. For detailed information on product setting, please refer to chapter [Product setting: Select services and set weight.](#)



Select [Save Memory] to store the selection as shortcut.



The program suggests a name for the new shortcut.

You can enter a different name if you want.



Confirm you entry.

The new shortcut is now saved. You can store up to 20 different shortcuts.

TIP: You can also create a new shortcut opening the Product Selection Wizard directly in the 'Process Mail' menu. Simply click on the field for selecting services.

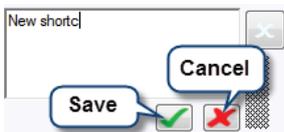
7.2 Rename shortcuts



Select [Shortcuts].



Click on the shortcut you want to rename.



The software opens an input box for text. Enter a new name.

Confirm your entry.

7.3 Resort shortcuts

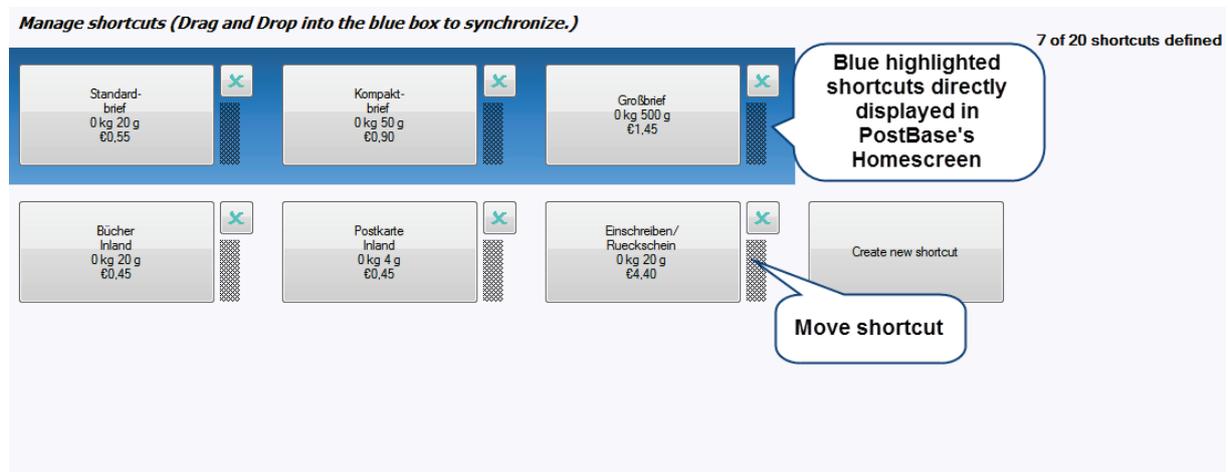
Setting the order of the shortcuts on the list, you determine which of them will be available at the PostBase mailing system.



Select [Shortcuts].

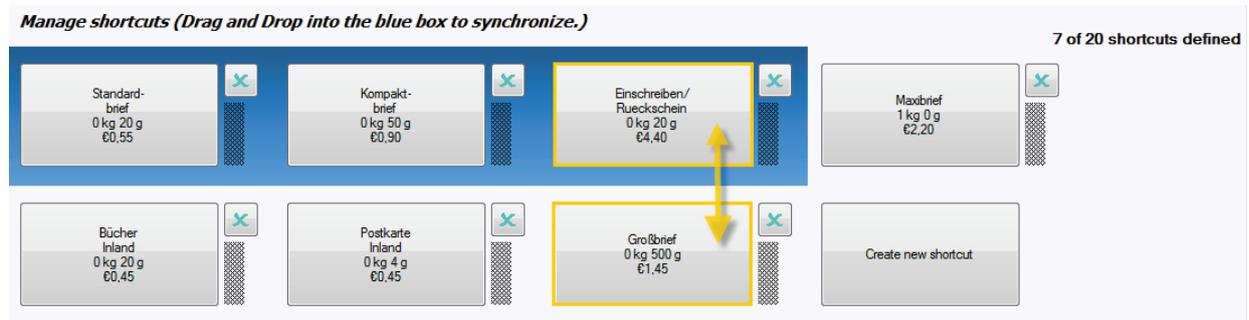
Depending on the equipment of your mailing system, either the first ten or all 20 shortcuts are transmitted to the PostBase.

The first three or four shortcuts in the list (depending on the equipment of your mailing system) are directly available in the PostBase's Homescreen. These shortcuts are highlighted in blue.



Click on the [Move shortcut] button next to the desired shortcut.
Hold down the mouse button.

Move the shortcut to its new position. The other shortcut key will take the empty position.



7.4 Delete shortcuts

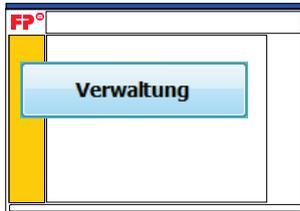


Select [Shortcuts].



Select the [x] button to the right of the shortcut you want to delete.

8 Manage users (Administrator only)



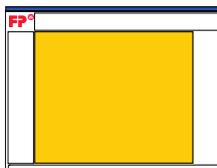
As Administrator, you can create users, set individual access rights for the respective users of the mailing system, view and change the user profiles, and delete users.

Note: The [Users] button is only available if you are logged in as Administrator at the PostBase. For info on how to change the user, please read chapter [Change PostBase user](#).

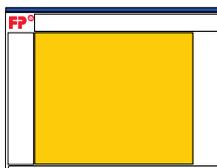
8.1 Overview



Click on [Users].



All users set up so far are displayed in the working area.



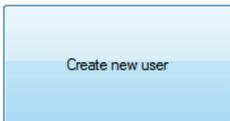
In the working area, you can:

- Create new users.
- Edit users.
- Delete users.

8.2 Create new user



Click on [Users].



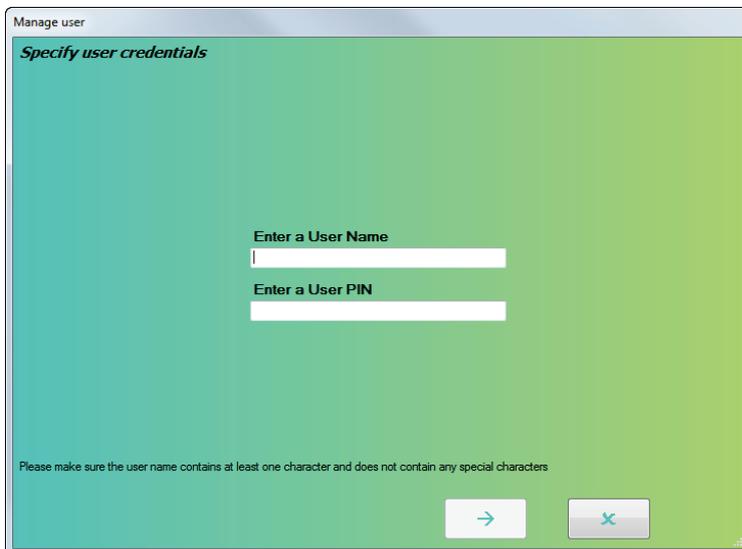
Click on [Create new user].

You can only create users if access control (PIN protection) is active. Hence, The software may ask you to enter an Administrator PIN first when creating the first user.



The software opens the user settings wizard. Follow the steps of the wizard.

Enter name / PIN

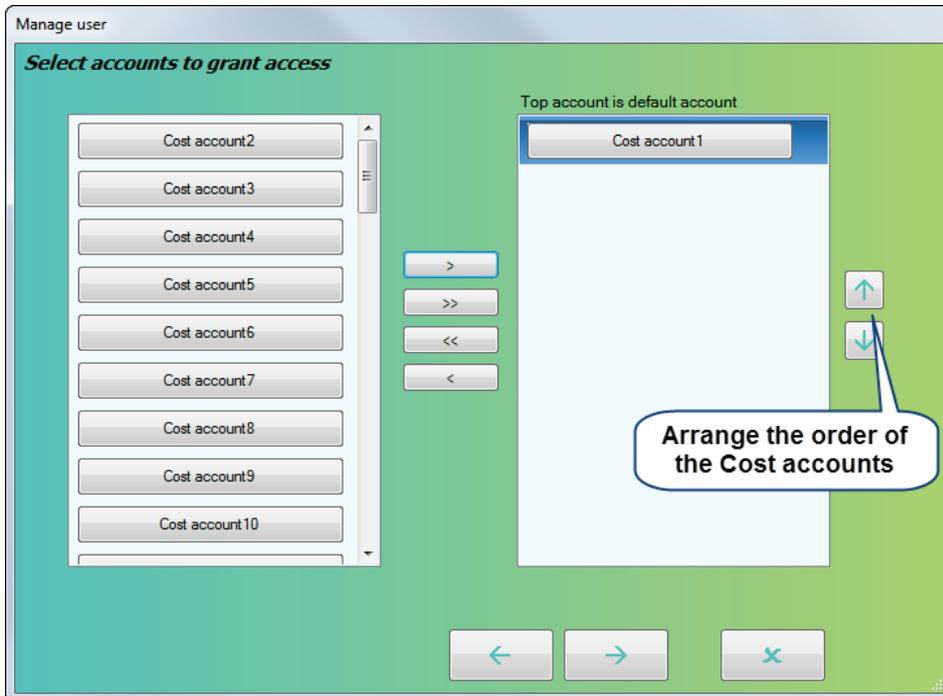


Enter the desired user name and user PIN.

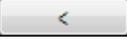
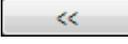


Proceed to the next step of the settings with [→].

Assign accounts



Select the accounts which the user should have access to (at least one).

Use the  /  buttons to grant access to the marked / to all accounts (or the  /  buttons to remove the marked / all accounts from the list).

TIP: You can drag and drop the accounts.



Proceed to the next step of the settings with [→].

Set budgets and maximum values

The screenshot shows a 'Manage user' window with a green background. The title is 'Set a budget, pieces and maximum postage'. There are three rows of settings, each with a numeric input field and a 'Not Limited' checkbox. A callout bubble points to the 'Not Limited' checkbox for the first row. At the bottom, there are three buttons: a left arrow, a right arrow, and a close button (X).

Monthly Budget in €	50.00	Not Limited	<input type="checkbox"/>
Pieces per Month	1	Not Limited	<input checked="" type="checkbox"/>
Max. Printable Postage in €	0.10	Not Limited	<input checked="" type="checkbox"/>

User may perform Postage Value Download

Define the budgets and maximum values for metering and set whether the user is allowed to download postage.



Proceed to the next step of the settings with [→].

The software shows a summary of the user settings.

The screenshot shows a 'Manage user' window with a green background. The title is 'User profile summary'. It contains a table with user settings. At the bottom, there are three buttons: a left arrow, a close button (X), and a save button (checkmark). Callout bubbles point to the 'Change settings' and 'Save' buttons.

User name	ivh1234
PIN	1234
Default account	Cost account1
Number of accounts	5
Monthly Budget	€50,00
Pieces Per Month	Not Limited
Max. Postage	Not Limited
User may perform PVD	Yes



Save the settings. The user settings wizard is closed.

8.3 Edit user



Click on [Users].



Click on the user you want to edit.

The software opens the user settings wizard. Follow the steps of the wizard. The procedure is the same as when creating a new user (see chapter [Create new user](#)).

8.4 Delete user



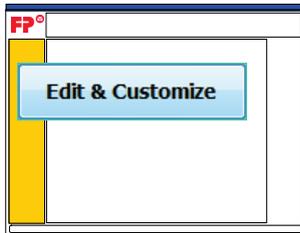
Click on [Users].



Click on the [x] button next to the user you want to delete. Confirm the security prompt.

Note: The Administrator cannot be deleted. If you want to deactivate user management completely, deactivate access control (see chapter [Access control / PIN](#)). In doing so, all users will be deleted!

9 Manage accounts



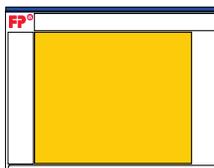
In the 'Edit and Customize' menu , you can manage accounts.

Note: If user management is enabled, the account administration functions are only available to the Administrator. For information on how to change the user, please read chapter [Change PostBase user](#).

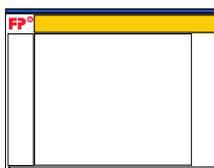
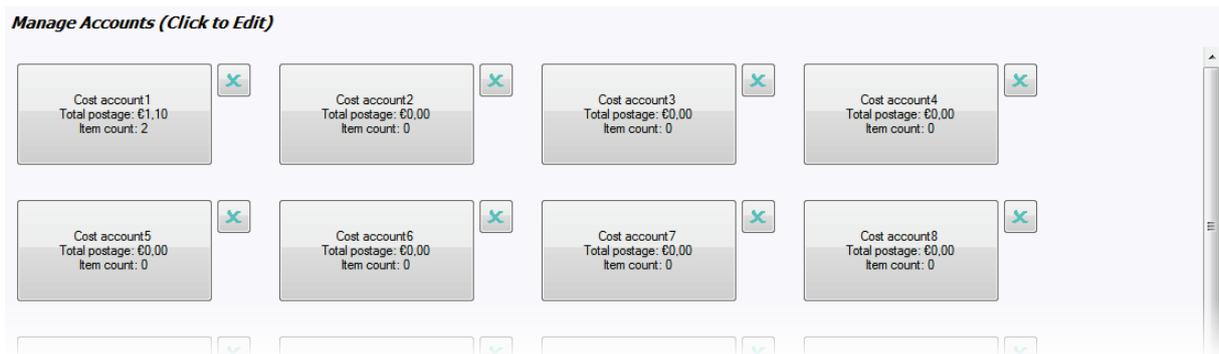
9.1 Overview



Select [Accounts].



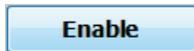
All accounts are displayed in the working area.



In the secondary menu, different functions are available:

- Enable / disable accounts.
- Preview and print account list.
- Reset all accounts.
- Clear all accounts.

9.2 Enable / disable cost accounts



Enable cost accounts: Click the [Enable] button in the secondary menu.

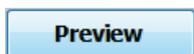


Disable cost accounts: Click the [Disable] button in the secondary menu. Every cost account will be cleared by this action.

9.3 Show and print account list (overview)



Print the account list with the printer connected to your PC. (Printer settings: see [Appendix](#)).

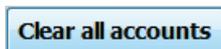


Call up a preview of account list.

9.4 Reset / clear all accounts

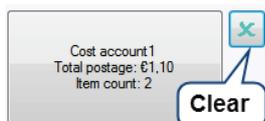


Restore factory settings. All consumption data and the names of all accounts will be reset. Choose whether the names should be reset to default ('Cost Account' and a consecutive number) or to a self-defined name with a consecutive number.



Reset all accounts to zero. The consumption data of all accounts is reset. Account names remain unchanged.

Clear a single account



Click on the [x] button to reset the account's piece counter and postage consumption to zero.

9.5 Rename accounts

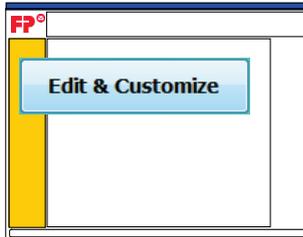


Click on the account you want to rename.



The software opens an input box for text. Enter a new name. Confirm your entry.

10 Manage adverts



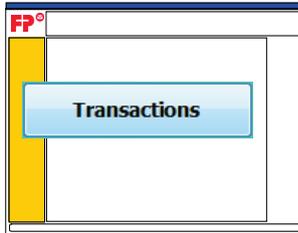
In the 'Edit and Customize' menu, you can manage adverts. For the administration of the advertisings, please refer to the FP Portal. Here you find all Logos available for download.



Select [Adverts]. The software sets up a connection to the FP portal.

TIP: The 'Adverts' menu includes a link to the PostBase Advert Designer in the FP Portal. Here you can create an individual advert.

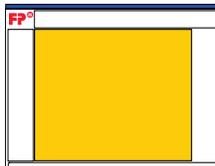
11 Transaction administration (only ReportOne)



Every time you meter a piece of mail, a transaction will be logged by ReportOne.

The 'Transactions' menu gives you a full picture of all your mailing activity, e.g. when any particular piece of mail was sent. All transactions are stored in the ReportOne database and used to generate reports.

11.1 Overview



The 'Transaction Administration' menu opens up in the working area.

Transaction Administration

Manual booking.. Export..

Enter transactions manually **Export transactions**

Creation	Product	Pos...	Reference	Notes	Void	Accounts
8/23/2012 ...	Inland Brief Standard	€0.55			No	[2] Cost account2
8/23/2012 ...	Inland Brief Standard	€0.55			No	[1] Cost account1
8/23/2012 ...	Inland Brief Standard	€0.55			No	[1] Cost account1

Transaction list (initially empty)

Searching area

Show transactions according to defined criteria

Transaction details

Transaction type: Meter transaction
 Creation time: 8/23/2012 8:09:41 AM
 Product: Inland Brief Standard
 Country: Inland
 Serialnumber: EP000108
 Reference id:
 Accounts 1: [2] Cost account2
 Notes:
 Void: No

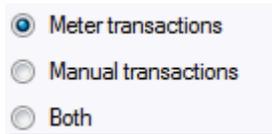
Select All Edit Unvoid Void Delete Clear

11.2 Search and view transactions

Transaction search

Even in a small system, there will probably be many thousands of transactions, so the searching function can be very useful.

Initially, no transactions are shown in the transaction list. To the left of the transactions list, you find the searching area. Here you can choose which transactions will be displayed.



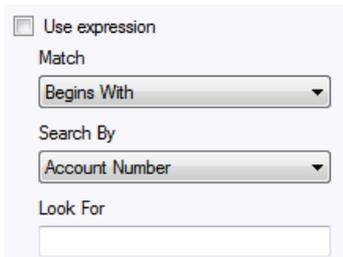
A form with three radio buttons for selecting transaction types: 'Meter transactions' (selected), 'Manual transactions', and 'Both'.

Choose between Meter transactions and Manual transactions or tick 'Both'.



A form titled 'Quick date selection' with a checked 'Use date' checkbox and a 'Today' dropdown menu. Below are 'Start Date' and 'End Date' fields, both containing '27 August 2012' and a calendar icon.

Choose a time period via 'Quick date selection' or enter an exact date or period. You can also untick the time criterion.



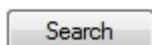
A form with a checked 'Use expression' checkbox. It includes a 'Match' dropdown menu set to 'Begins With', a 'Search By' dropdown menu set to 'Account Number', and a 'Look For' text input field.

You might as well search by expression.



A checkbox labeled 'Only unvoided' which is currently checked.

Untick this box to view voided transactions.



A rectangular button labeled 'Search'.

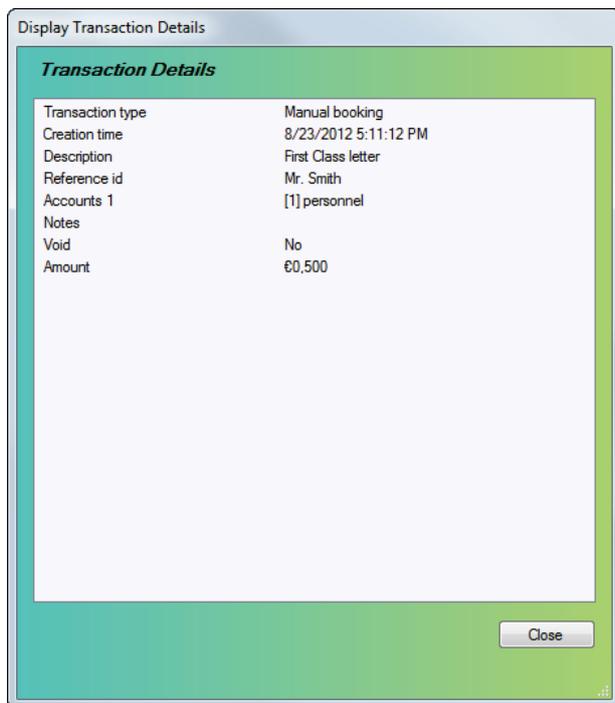
When the desired search criteria are set, click on [Search].

Show transaction details

	Postage	Rel
s letter	€0,50	Mr
s letter	€0,50	Mr
velope	€1,10	La

Double click a transaction row in the transaction list.

ReportOne opens a 'Transactions Details' pop up. It shows all the information about the chosen transaction. The information is also displayed beneath the transaction list.



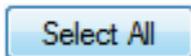
11.3 Handle transactions

11.3.1 Edit transactions

Creation	Product	Pos...	Reference	Notes	Void	Accounts
8/23/2012 ...	Inland Brief Standard	€0,55			No	[2] Cost account:2

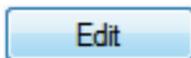
Select the transactions you wish to edit

OR



Click [Select All] to select all transactions.

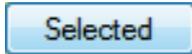
NOTE: You cannot edit the amount or product selection once a transaction has been recorded in the database.



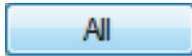
Click on [Edit].

ReportOne opens an 'Edit Transactions' Wizard.

To apply the changes, tick the corresponding check boxes 'Include accounts into updated transactions', 'Notes' and 'Reference'.



With the [Selected] button you confirm the changes for the selected entries in the transaction list.



With the [Select All] button you confirm the changes for all entries in the transaction list.

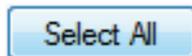
The transaction list in the 'Transaction Administration' menu shows the new data.

11.3.2 Void / unvoid transactions

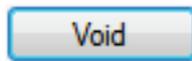
Creation	Product	Pos...	Reference	Notes	Void	Accounts
8/23/2012 ...	Inland Brief Standard	€0,55			No	[2] Cost account.2

Select the transactions you wish to void, unvoid or delete

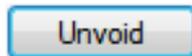
OR



Click [Select All] to select all transactions.



Click [Void] to exclude transactions from the reports.

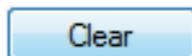


Click [Unvoid] to include voided transactions again in the reports.

11.3.3 Delete / clear transactions



Click [Delete] to remove a transaction from the system permanently.



Click [Clear] to remove all transactions.

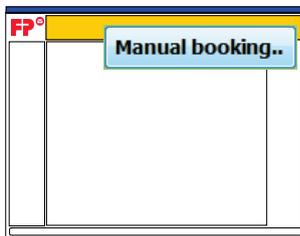
Note: It is strongly recommended that you use voiding rather than deleting, since you can later recover voided transactions by unvoiding.

11.4 Manual booking

For different reasons you might use PostBase to meter mail independently of ReportOne (known as offline postage). If you want to add these transactions to the ReportOne reports, you can enter them in the 'Transaction Administration' menu.

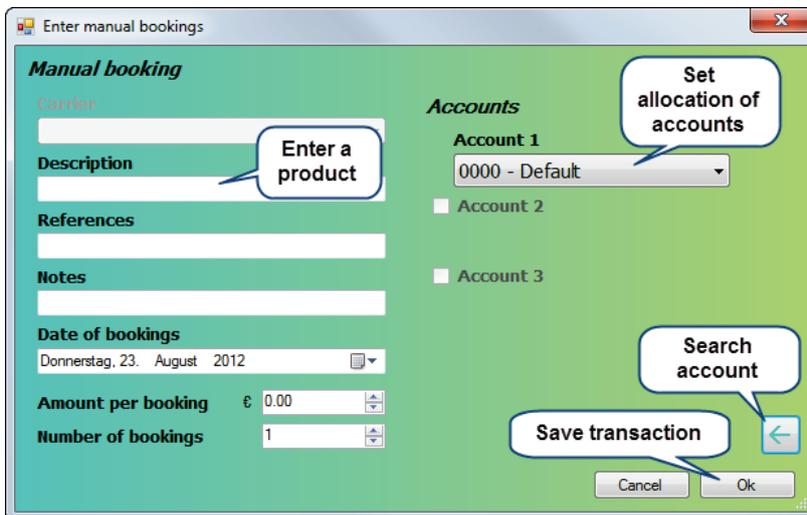
Furthermore, there are mail items booked independently from the meterings, e.g. general administration fees of post offices or special services such as inserting etc. You can book these transactions manually as well.

To enter transactions manually, proceed as follows:

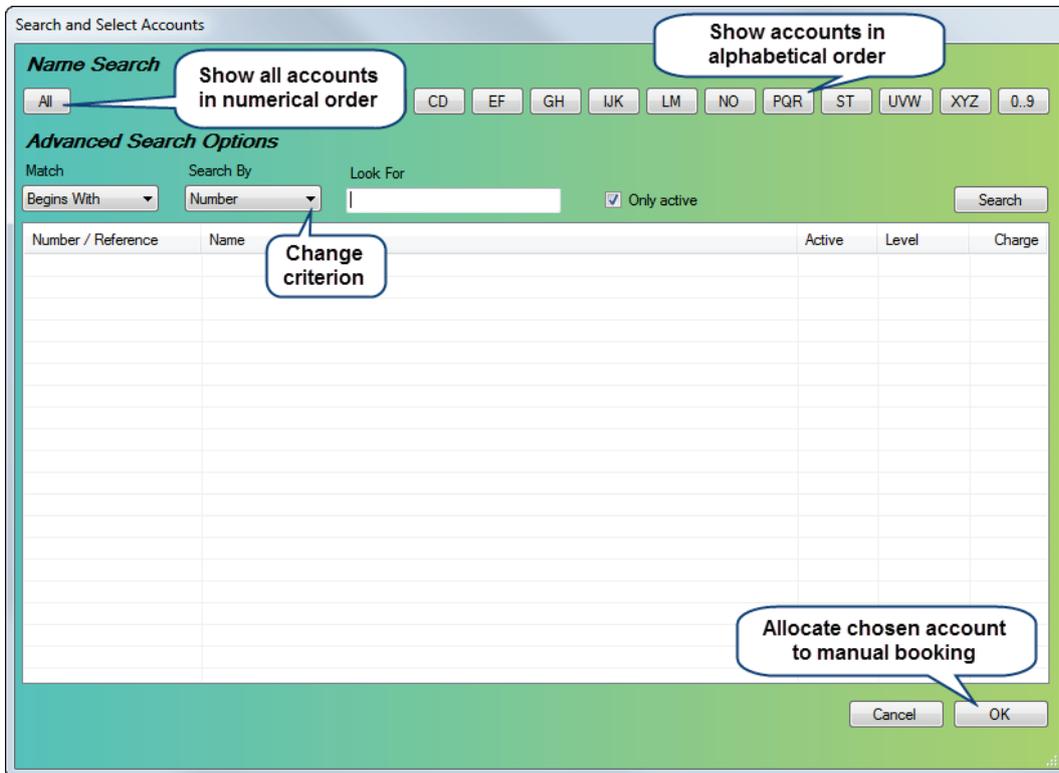


Click [Manual Booking..] in the secondary menu.

ReportOne opens a 'Manual booking' Wizard. Here you can enter the transaction details.

A screenshot of the "Enter manual bookings" wizard form. The form is titled "Manual booking" and contains several sections: "Carrier" (empty), "Description" (with a callout "Enter a product"), "References" (empty), "Notes" (empty), "Date of bookings" (set to "Donnerstag, 23. August 2012"), "Amount per booking" (set to "€ 0.00"), and "Number of bookings" (set to "1"). On the right side, there is an "Accounts" section with a dropdown menu for "Account 1" (set to "0000 - Default") and checkboxes for "Account 2" and "Account 3". A callout "Set allocation of accounts" points to the dropdown. At the bottom right, there is a "Save transaction" button with a callout, and "Cancel" and "Ok" buttons. A callout "Search account" points to a search icon.

The 'Name Search' pop up opens when you click on  in the 'Enter manual bookings' window. You can methodically search for the desired account. With [OK] you quit the search and assign the account. You then return to the 'Manual booking' window.



11.5 Export transactions

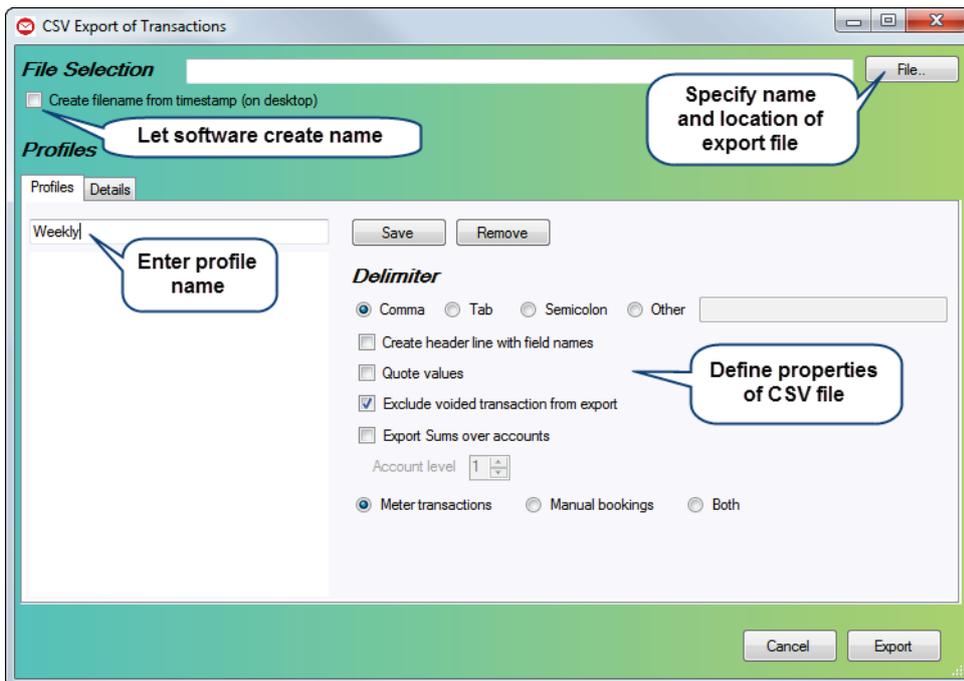
You may want to examine the transactions in other formats than given in the ReportOne reports. You might also wish to perform calculations on them in a spreadsheet program.

To do this, you can use the Transactions Export function. It allows you to extract data out of the software's database and store it in a format (CSV) that can then be read by many other programs, including most spreadsheet or database programs.



Click [Export..] in the secondary menu.

ReportOne opens a 'CSV Export' Wizard. Define how the export file should be formatted and where it should be stored. If you have to export data regularly, e.g. weekly or monthly reports, you can save the formats and properties of each type under a profile name.

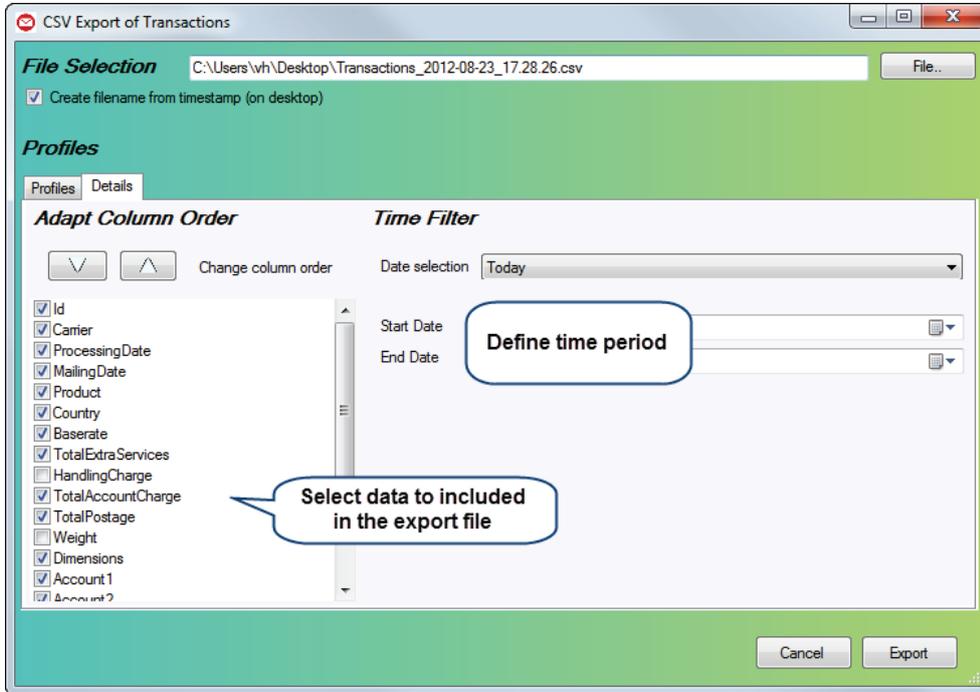


Note: CSV ('Comma Separated Values') is a simple format consisting of rows of data. Each row holds the various fields of data needed to define a transaction. The individual pieces of data (date, account, etc.) in a row are separated by a particular character. In the delimiters section, you specify this character. The best separator is a character which will never occur in the data itself.

You can also choose whether an initial heading line should be output (which can be useful if people will ever need to look directly at the file itself).

Enclosing data in quotes is recommended if you have textual data including spaces.

Select the [Details] tab to choose which data should be included in the export file, in which order these columns of data should appear and over which period of time.



12 Reports (only ReportOne)



ReportOne enables you to generate different types of reports.

12.1 Types of reports

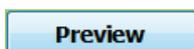
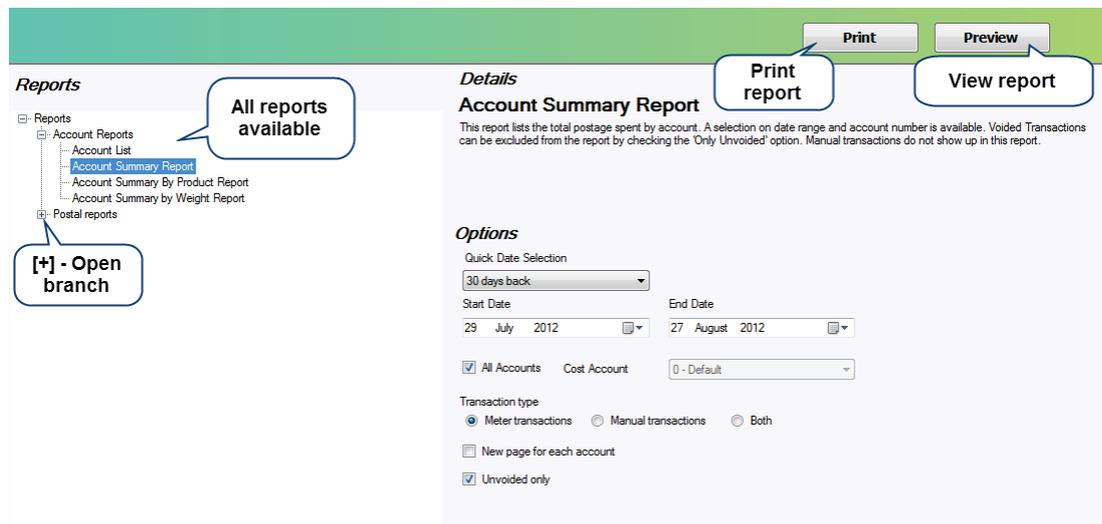
Account Reports show you the details on the accounts you have set up in ReportOne. The Account list shows you all the accounts you have set up, together with any account charges you have set up for them.

Postal Reports show you on what postal products you postage costs have been spent over a given period. The information is presented in both chart and tabular formats.

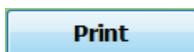
Note: Manual transactions are excluded from the reports.

12.2 Generating reports

For most reports, you will need to give additional criteria, e.g. the timeframe the report should cover. These details are entered in the 'Options' area, and may vary according to the report you select.



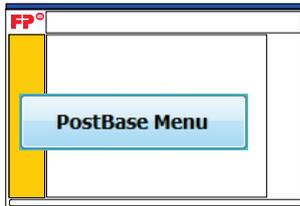
Click [Preview] to see the report.



Click [Print] to print it out.

TIP: Clicking on [Print], a printer dialog box may appear first. You can turn this function off in the Print Settings.

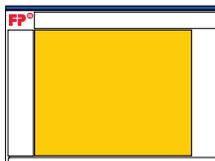
13 PostBase Setup and special functions



The software enables you to make selected PostBase mailing system settings from your PC.

NOTE: All these features are available at the PostBase mailing system. For more detailed information, please refer to the PostBase Operator Manual (Reference Guide).

13.1 Overview



The 'PostBase Menu' is displayed in the working area.

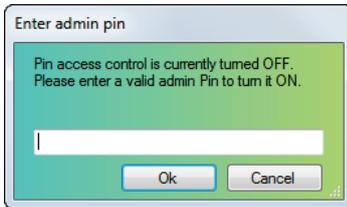


13.2 Access control / PIN



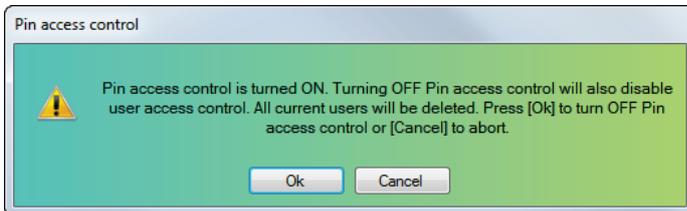
Click on [Manage Pin]. Protect your access against unauthorized use.

Activate access control



This window appears when you activate access control. Enter the Administrator PIN. You can now create new users. For detailed information, please read chapter [Create new user](#).

Deactivate access control



This window appears when you deactivate access control. All previously set up users, as well as their data and settings, are deleted without warning.

Note: The [PIN] button is only available if you are logged in as Administrator at the PostBase. For info on how to change the user, please read chapter [Change PostBase user](#).

13.3 Registers



Click on [Registers]. You are given an overview on your postage credit, the control total, the total of all meterings, and the last postage download amount.

13.4 Load postage



Select [Download postage]. To load postage, you enter the desired amount and connect to the data center.

Billing occurs according to your contract with the postal service.

Note: If user management is activated, the [Download Postage] button may not be available. In that case, please contact the administrator.

13.5 Auto Postage Download



Select [Auto Postage Download]. The 'Auto Postage Download' feature facilitates keeping track of the remaining postage. When enabled, it will warn you once the remaining postage reaches the preset threshold and will give you the opportunity to load postage.

Note: If user management is activated, the [Auto Postage Download] button may not be available. In that case, please contact the administrator.

13.6 Reset piece counter



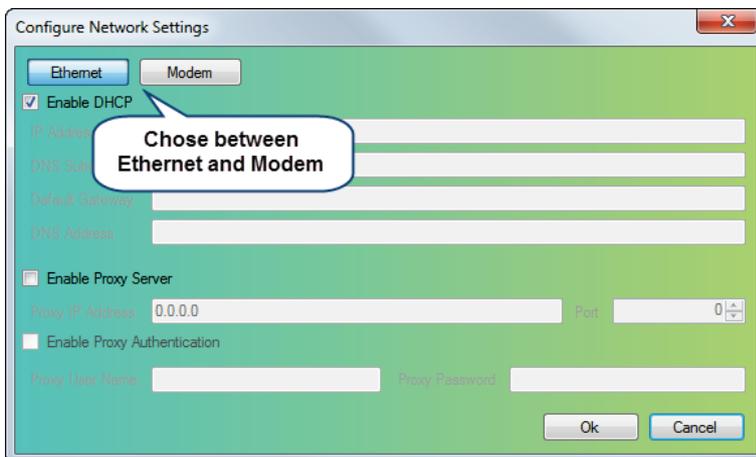
The piece counter counts all meter imprints. Select [Piece Counter]. Check the number of metered mail pieces or reset the counter to zero.

13.7 Manage Connection



Select [Manage Connection] in the PostBase Menu. You should set the respective connection parameters during commissioning. Verify and, if necessary, correct the settings if changes were made to your system configuration. In case of problems, please contact your network administrator.

The software opens the 'Configure Network Settings' Wizard. Choose between [Ethernet] and [Modem] first.

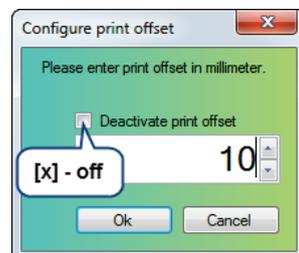


13.8 Imprint Offset



PostBase prints the meter imprint at a fixed offset (approx. 1 cm / 0.4") from the right mail piece edge. You can increase this offset and thus shift the meter imprint to the left by adjusting the imprint offset. Select [Imprint Offset] in the PostBase Menu.

The icon and the set offset value appear in the 'Process Mail' menu.



13.9 Auto Off



The Auto Off time is the time between your last operation and the time PostBase automatically switches off. If you want to set this time, select [Auto Off] in the PostBase Menu.

13.10 Standby Time



The PostBase mailing system will go to standby automatically if it is not used for a certain time. To set this time, click on [Standby Time] in the PostBase Menu.

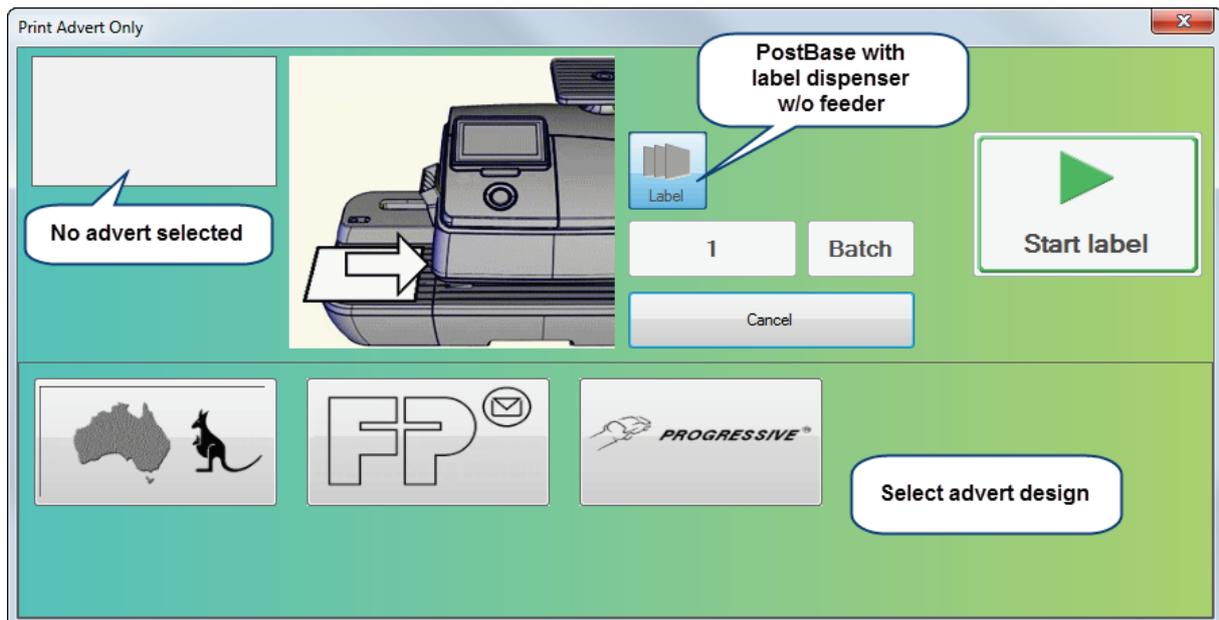
Note: When connected with PostBase RemoteOne / ReportOne, PostBase will neither turn itself off, nor enter standby mode.

13.11 Print Advert Only

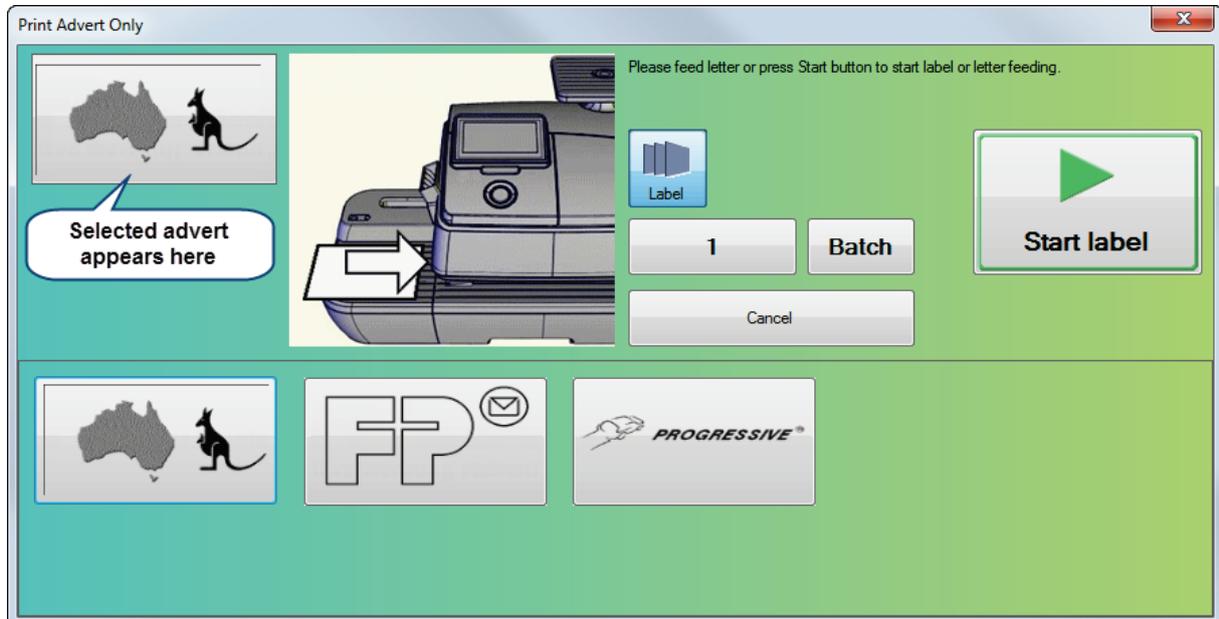


The software enables you to print all stored adverts separately. Click on [Print Advert Only] in the PostBase Menu.

The software opens a new window. Select the advert you want to print



Start printing as described in chapter [Metering](#).



You can quit with [Cancel].

14 Troubleshooting

Connect / Start software

Problem Area: The software cannot establish a connection with PostBase.

- Rectification:**
- Check if PostBase is running.
 - Check if PostBase displays the Homescreen (see chapter [Start / exit the program](#)).
 - The USB cable must be properly connected.
-

Problem Area: PostBase has entered standby mode and is disconnected from RemoteOne / ReportOne. I cannot to re-establish the connection even though all cables are properly connected and PostBase shows the Homescreen.

- Rectification:**
- Turn off PostBase and close the program. Turn the mailing machine on again. As soon as PostBase shows the Homescreen, open RemoteOne / ReportOne and click [Connect].
-

Postage download

Problem Area: The software cannot perform postage download.

- Rectification:**
- In the 'PostBase Menu', check the connection settings (see chapter [Manage Connection](#))
 - In the Settings menu, check if the right Internet data has been entered (see [Appendix Internet settings](#)).
 - Check if the network cable is properly connected.
-

Problem Area: The [Download Postage] button is missing.

- Rectification:**
- The current user is not authorized to load postage. Please contact the Administrator.
-

Metering

Problem Area: When trying to meter, PostBase issues an error message.

- Rectification:**
- Monthly budget exceeded. Please contact the Administrator.
 - Maximum number of meterings per month reached. Please contact the Administrator.
 - Maximum postage value for metering exceeded. Please contact the Administrator.
-

Problem Area: Advert and/or text cannot be set

- Rectification:**
- For the currently set product, a special postal identifier is printed. Such meterings do not allow adverts/texts or allow for only one to be printed. Watch the PostBase display. PostBase blanks out the areas where adverts/texts are not allowed.
-

Accounts

Problem Area: Accounts are missing.

- Rectification:**
- When user management is enabled, only accounts assigned to the current user are shown. Please contact the Administrator.
-

Problem Area: Accounts cannot be edited.

- Rectification:**
- When user management is enabled, the account administration functions are only available to the Administrator. Please contact the Administrator.
-

Menu functions

Problem Area: Functions are missing.

- Rectification:**
- When user management is enabled, the some functions are only available to the Administrator.
Please contact the Administrator.
 - Some functions are only available for ReportOne.
-

FP Portal

Problem Area: The software cannot establish a connection with the FP Portal.

- Rectification:**
- Check if your PC is connected to the Internet.
 - In the 'PostBase Menu', check the connection settings (see chapter [Manage Connection](#))
 - In the Settings menu, check if the right Internet data has been entered (see [Appendix Internet](#)).
-

Language

Problem area: I have changed the language in the Settings menu. The software interface still shows the previously set language.

- Rectification:**
- Exit the program and restart it. The program will now adopt the new language.
-

Printing

Problem Area: I want to print a report. An error message appears.

- Rectification:**
- Check if the printer is running and properly connected to your PC.
 - Check if the right printer has been set in the Settings menu (see [Appendix Printer](#)).

Manage users

Problem Area: No users available.

Rectification: – When deactivating access control, all users are irretrievably deleted. Create new users (see [Create new user](#)).

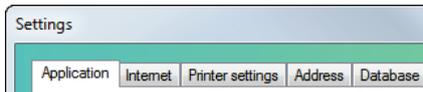
15 Appendix: Software settings

15.1 Settings overview



Click on [Setup..] in the main menu. The software opens the 'Settings' dialog box.

Select the corresponding tab to make Application settings, Imprint settings etc.

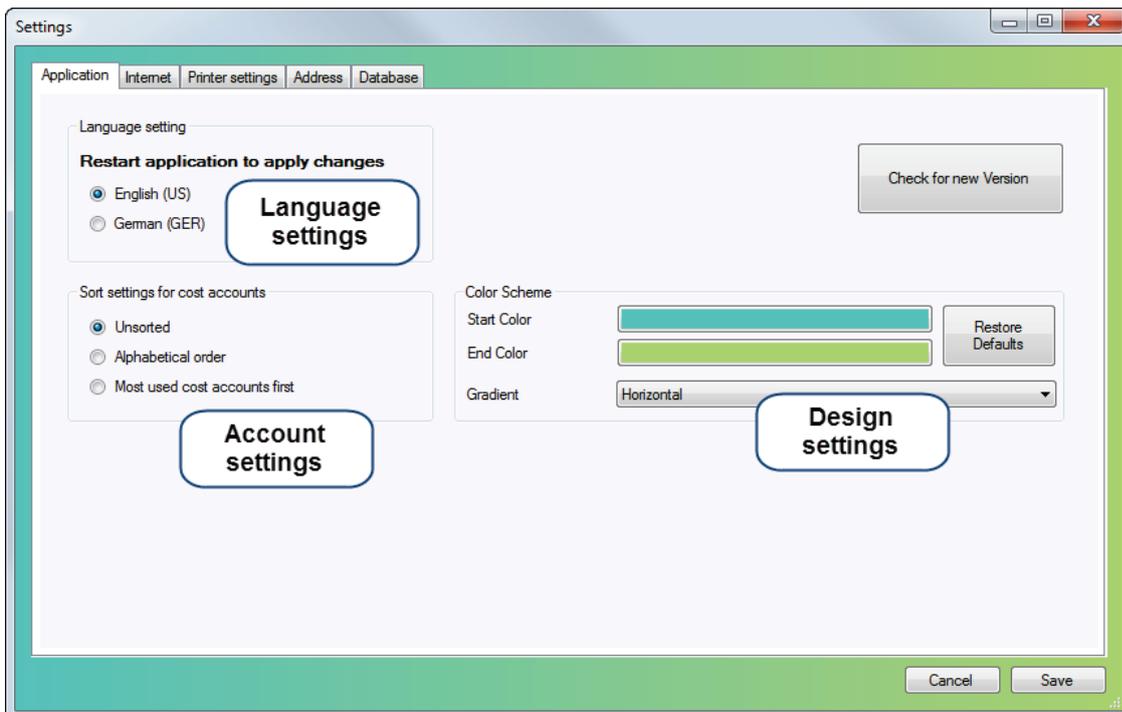


15.2 Application

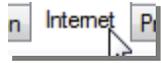


Click on the tab 'Application'.

You can now make language and cost account settings, change the color scheme and check for a new software version.

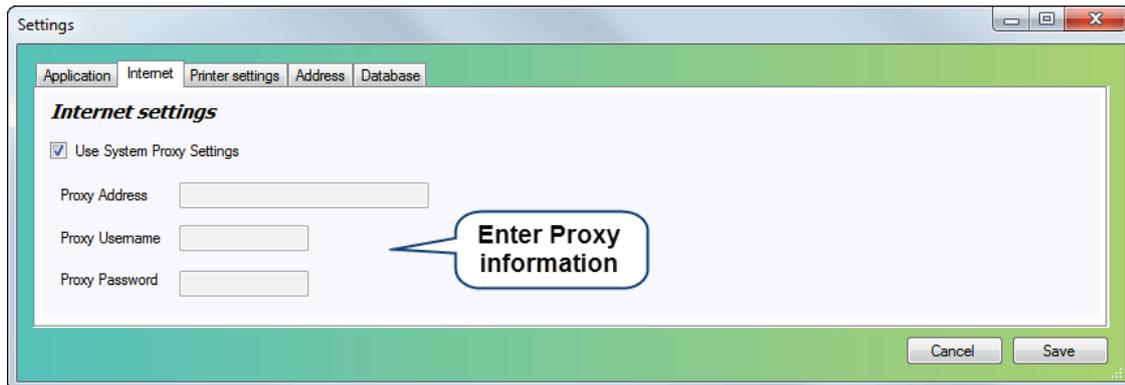


15.3 Internet



Click on the tab 'Internet'.

Enter the desired Proxy data or use the system's settings.

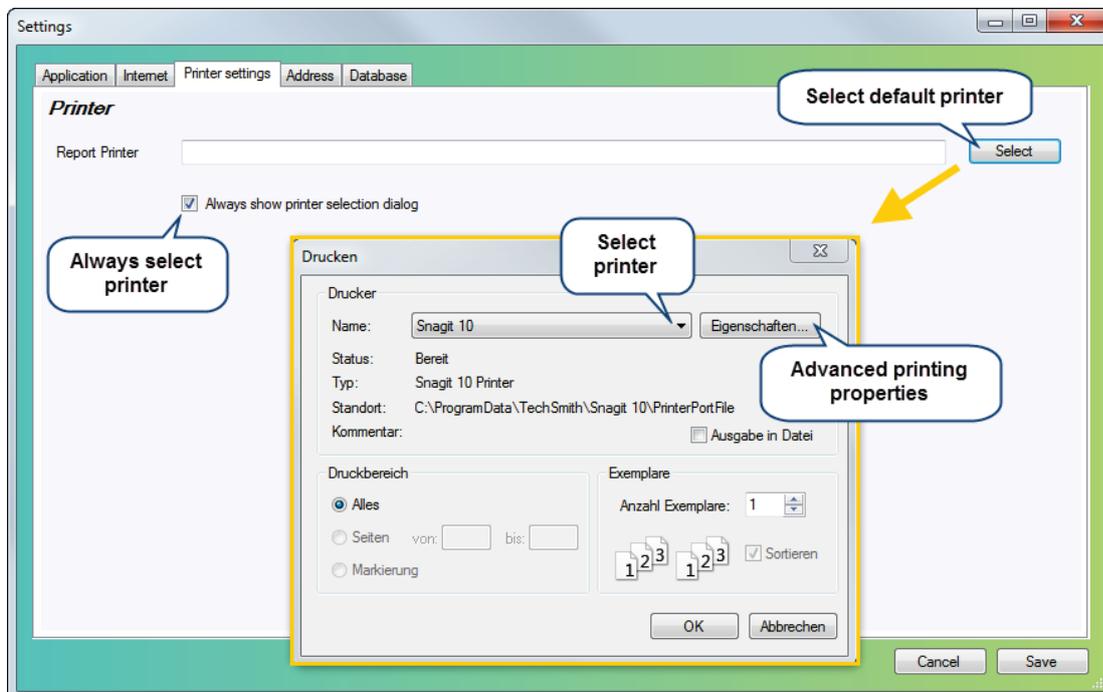


15.4 Printer



Click on the tab 'Printer settings'.

Click on [Select] to set the default report printer.



Note: If you tick the box 'Always show printer selection dialog', the software asks you to select a printer whenever you print a report.

15.5 Address

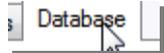


Click on the 'Address' tab.

Enter your address.

A screenshot of the 'Settings' window with the 'Address' tab selected. The window contains several text input fields for 'Name', 'Organization', 'Address', 'Post Town', and 'Post Code'. At the bottom right, there are 'Cancel' and 'Save' buttons.

15.6 Database



Click on the 'Database' tab.

In this tab, you configure the database backup.

Furthermore, you can repair / optimize the database. By running the [Repair Database] function, damaged data will be removed from the database, thus ensuring flawless operation. Regularly optimizing the database ensures a continuous high performance of the entire system.

A screenshot of the 'Settings' window with the 'Database' tab selected. The window is divided into two sections: 'Database Backup' and 'Compact and repair database'. The 'Database Backup' section includes a 'Backup directory path' field with a 'Browse' button, a list of databases to backup, and checkboxes for 'Automatic backup on every application startup', 'Automatic backup on every application shutdown', and 'Unlimited number of backup files'. A spinner box for 'Maximum number of backup files' is set to 1. A 'Backup now' button is also present. The 'Compact and repair database' section has a 'Repair Database' button. Three callout boxes with arrows point to specific elements: 'Set backup time' points to the 'Automatic backup on every application shutdown' checkbox; 'Set number of backup files' points to the spinner box; and 'Specify backup folder' points to the 'Browse' button. A fourth callout box, 'Repair damaged data', points to the 'Repair Database' button. 'Cancel' and 'Save' buttons are at the bottom right.