PostBase

NavigatorBasic

NavigatorPlus

User Manual

SW Version 1.15.15.93 / Manual Release 04/30/2015

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1 Introduction

About this User Manual

This User Manual describes NavigatorBasic / NavigatorPlus for the PostBase Mini franking machine and the PostBase mailing system.

This User Manual assumes that both PostBase Mini / PostBase and NavigatorBasic / NavigatorPlus have already been installed and are operational.

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.
TIP / additional information	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. 'NavigatorPlus'.
PostBase	Instead of the entire product names 'PostBase Mini franking machine' and 'PostBase mailing system', this User Manual uses the name of the product line for the sake of convenience: PostBase.
Illustrations / Screenshots	The illustrations / screenshots in this User Manual are examples that may differ from the actual displays on your monitor. Screenshots mostly show Navigator with a PostBase mailing system as an example.
(NavigatorPlus only, not in all countries, …)	Functions that are not available to all users (e.g. due to postal requirements in some countries or because PostBase Mini does not support this feature) are marked by an additional note.
Further documents	Information on available product variants and country-specific particularities can be found in the Addendum to the PostBase Mini / PostBase Operator Manual *(if available in your country).*

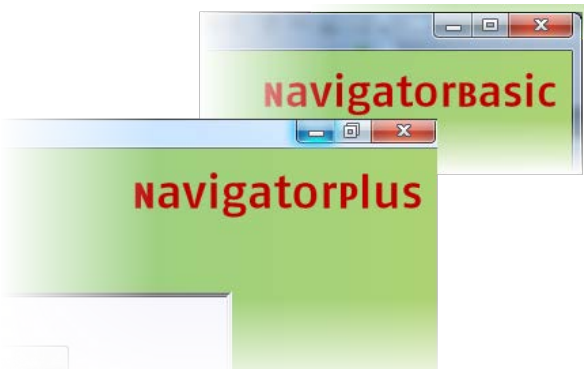
What is PostBase NavigatorBasic / NavigatorPlus?

PostBase NavigatorBasic / NavigatorPlus are user-friendly PC applications enabling you to set up, maintain and use your PostBase Mini franking machine or PostBase mailing system.

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

TIP: To download PostBase NavigatorBasic / NavigatorPlus, please visit our web portal.

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



Application areas (examples)

- Franking
- Load postage *(not in all countries)*
- Create shortcuts
- Manage cost accounts
- Manage advertising imprints
- Manage user and access rights
- Print reports *(only NavigatorPlus)*
- Display and export transactions *(only NavigatorPlus)*
- Change system settings of PostBase

System requirements

- Windows Vista / Windows 7 / Windows 8
- 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 / connect to PostBase / exit the program

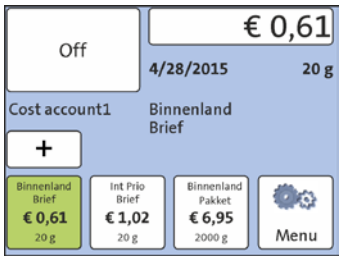
2.1 Start Navigator and connect with PostBase automatically

2.1.1 PostBase Mini franking machine

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.

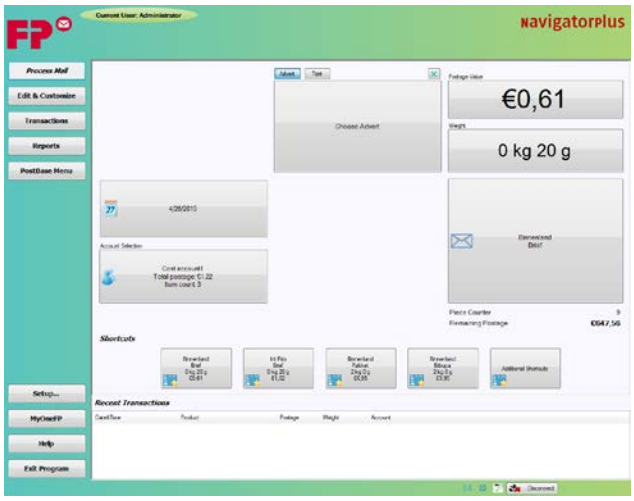
First make sure that the software is installed and the PostBase Mini is connected to your PC. PostBase Mini must show the Home screen as shown in the example below.

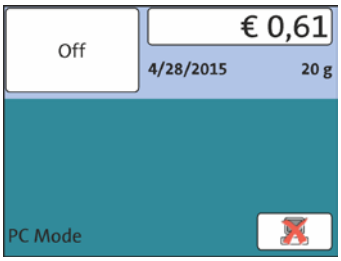
Home screen



Starting NavigatorBasic / NavigatorPlus

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



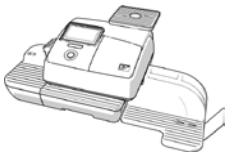


When PostBase Mini is connected to the software, it shows a screen like this.

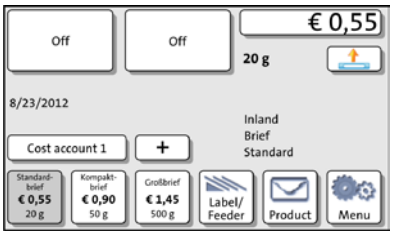
2.1.2 PostBase mailing system

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 Home screen as shown in the example below.

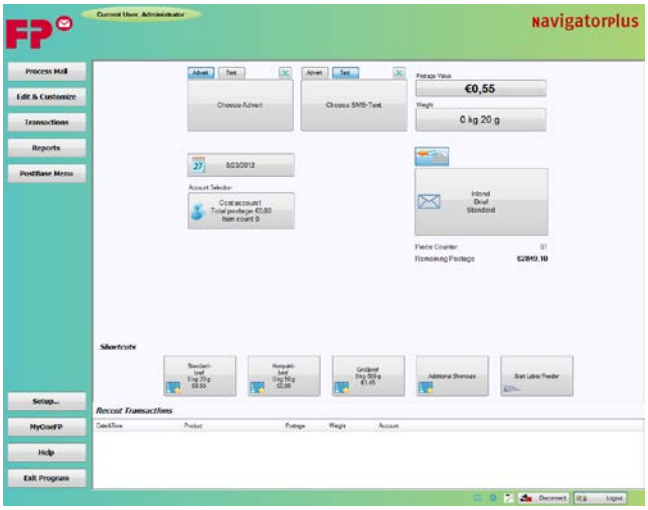


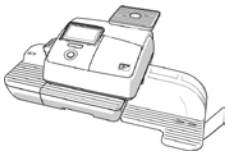
Home screen

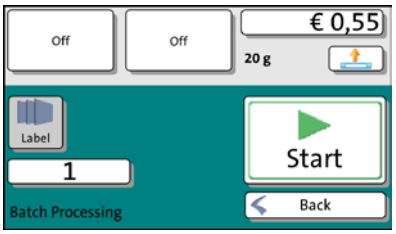


Starting NavigatorBasic / NavigatorPlus

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



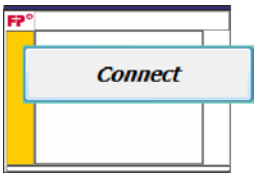




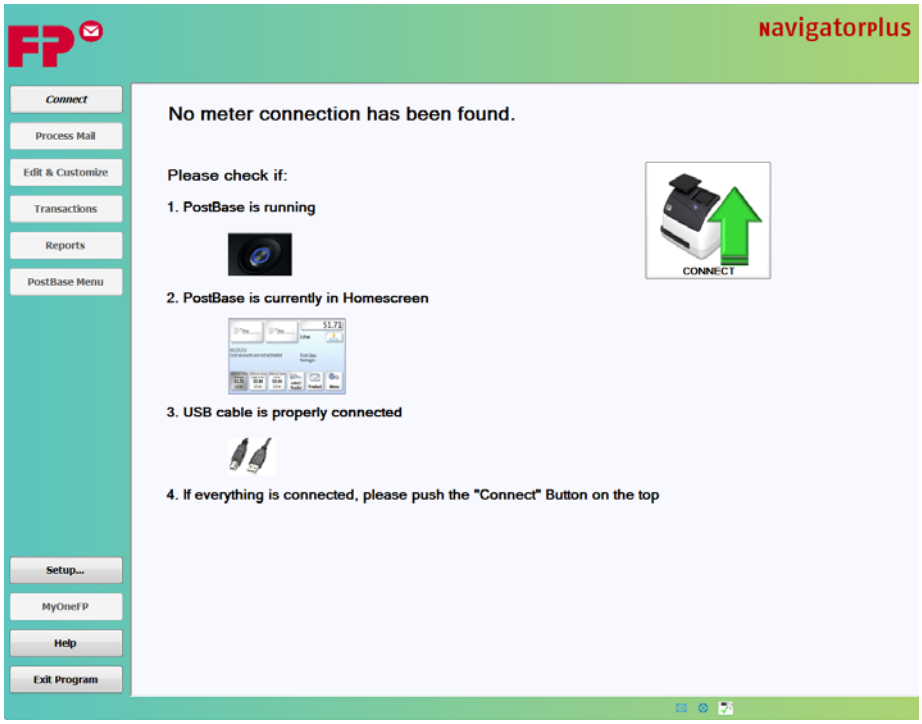
When PostBase is connected to the software, it shows a screen like this.

2.2 Connecting manually

2.2.1 Navigator and PostBase Mini



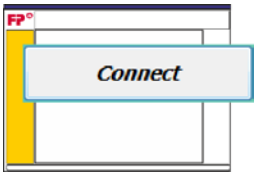
If connection does not work, NavigatorBasic / NavigatorPlus shows the following screen.



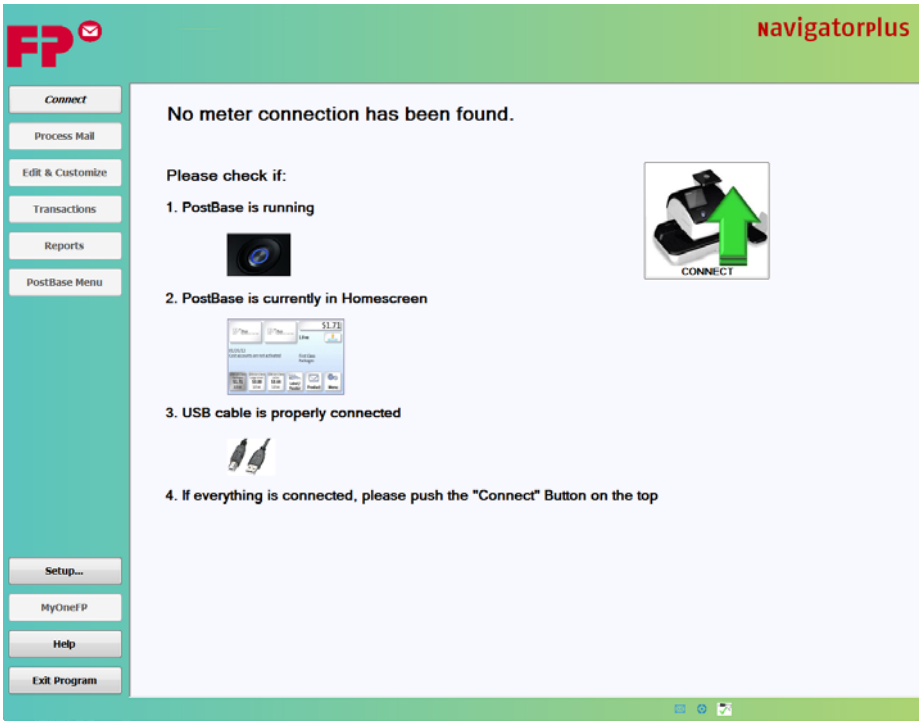
Check if PostBase Mini shows the Home screen. Click the [CONNECT] button in the working area.

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

2.2.2 Navigator and PostBase



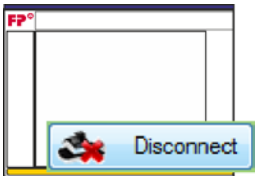
If connection does not work, NavigatorBasic / NavigatorPlus shows the following screen.



Check if PostBase shows the Home screen. Click the [CONNECT] button in the working area.

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

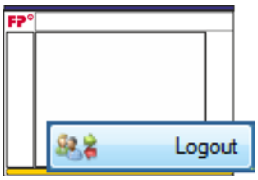
2.3 Disconnect PostBase and exit



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

PostBase shows the Home screen. You can now use PostBase without Navigator.

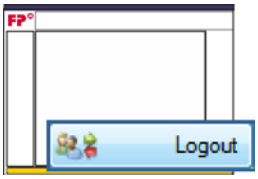
2.4 Log out PostBase user



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

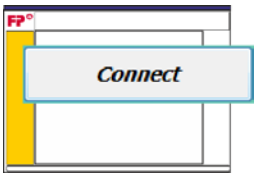


Click the [Logout] button in the status area and confirm the security prompt.

The connection between Navigator and the PostBase is terminated.
PostBase changes to the login screen.

On the PostBase, select the desired user and enter the PIN.

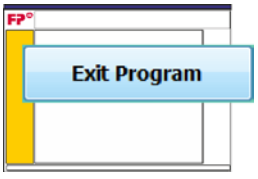
Check if PostBase shows the Home screen.
Click the [Connect] button in the working area.



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

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

2.6 Exit NavigatorBasic / NavigatorPlus

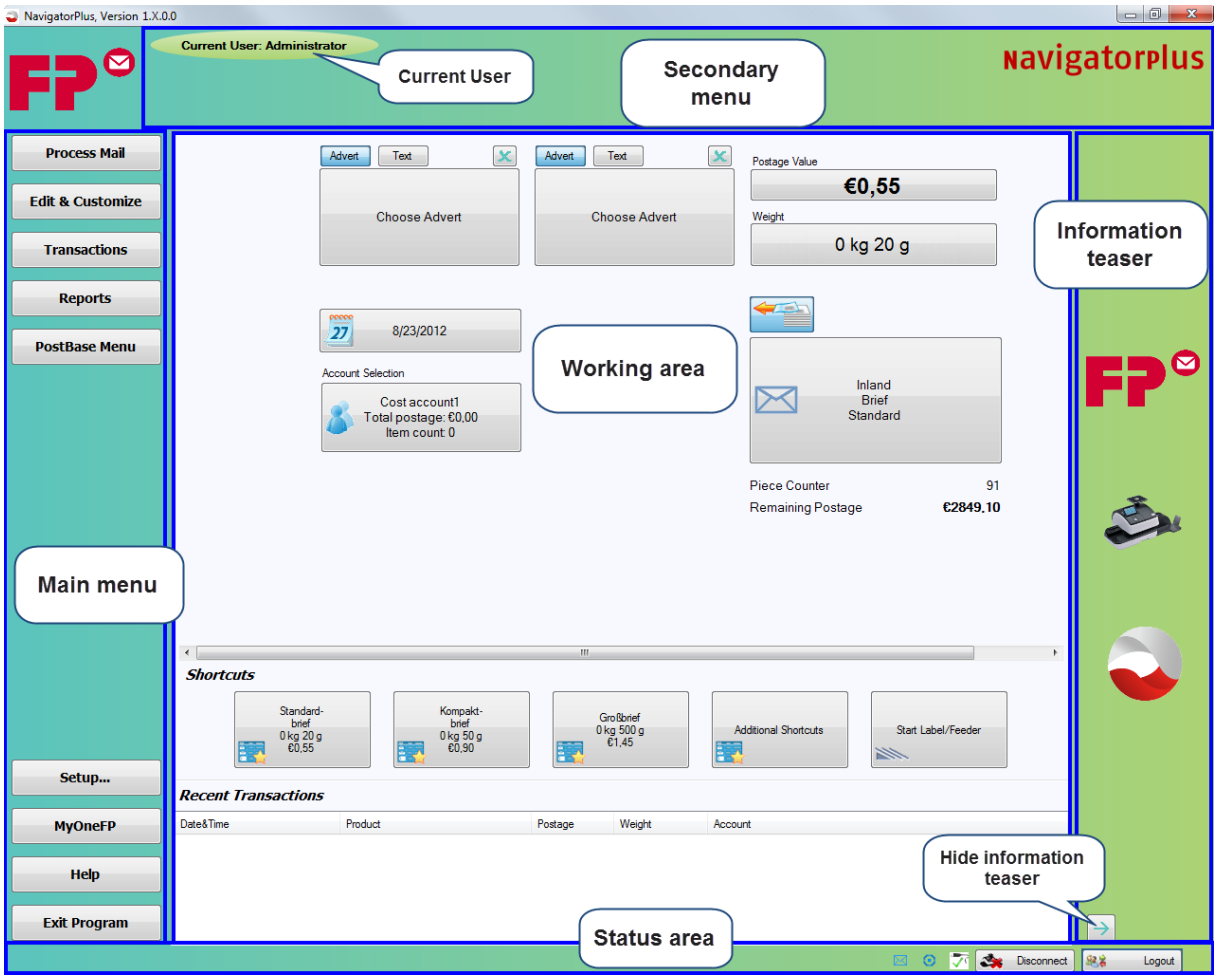


If you want to exit the software, click [Exit Program] on the main menu or the [x] button on the top right corner.

The connection to the PostBase is terminated and PostBase shows the Home screen.

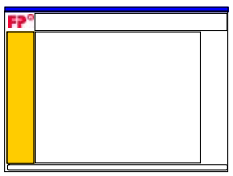
3 The user interface

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.



The information teaser offers current information on Francotyp-Postalia, e.g. trade shows or special offers. You can hide the information teaser with the [→] button. When restarting the program, the information teaser will reappear.

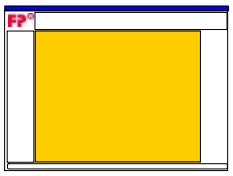
3.1 The main menu



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…], [MyOneFP] and [Help] functions. The selected menu will appear in the working area.

The [Exit Program] button closes the program.

3.2 The working area

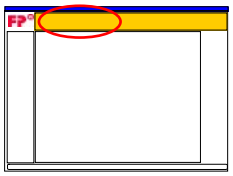


The active menu appears in the working area.

In order to make it easier for you to switch between software and PostBase, the working area was designed on the basis of PostBase's display.

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

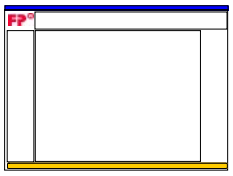
3.3 The secondary menu



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 franking machine and on current processes.

3.5 Buttons and other elements (selection)

Buttons and input elements

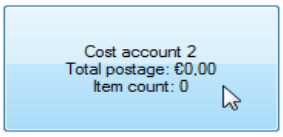
save Save an entry (e.g. a shortcut).

cancel Reject an entry.

clear / delete According to context:

- Remove from selection (e.g. advert).
- Delete (e.g. shortcut).
- 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.

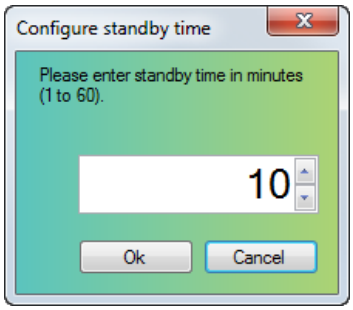
Button for moving fields

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.

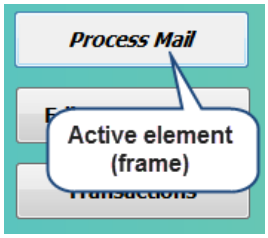
For the input of values, you can use the arrow buttons as well as the PC keyboard.



Example: Standby time.

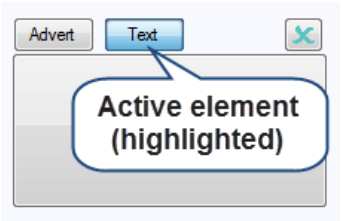
Status display for buttons

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.

In the main menu, the title of the currently active menu is shown in italics.

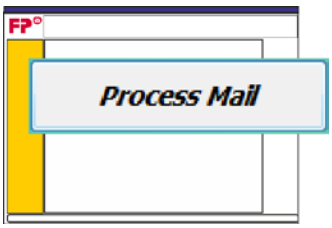


Software navigation

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



Franking settings

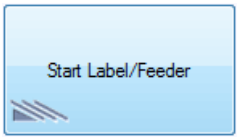
- Services
- Weight
- Advert/Text
- Account
- Change date

You can easily define franking settings from your PC. These include product settings (services and weight) as well as selecting an advert and / or a text message *(not in all countries)*. Furthermore, you can select an account and adjust the date of postage. (Provided the postal regulations allow it, predating is possible.)

(For further information, see chapter Franking settings.)

Differential weighing *(not PostBase Mini)*

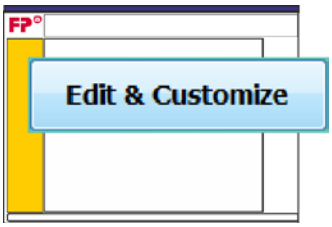
Weigh and frank larger volumes of similar mail pieces quickly and conveniently.



Franking

Start the franking process directly from your PC *(not PostBase Mini)*.

4.2 Management



Manage text messages *(if available in your country)*

You can enter texts via PC keyboard and store them as text messages. Navigator offers the option to create QR codes with plain text descriptions. (For further information, see chapter Manage texts.)
You can access all stored texts from PostBase.

Manage shortcuts

Navigator offers shortcuts which can store frequently used product settings. You can the 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

Navigator shows you all existing accounts. It provides information about the accounts themselves, their postage consumption and number of franking 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.)

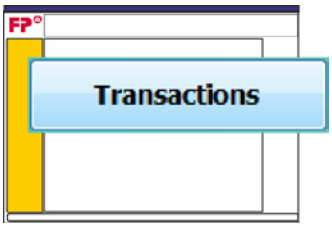
Manage adverts *(subject to country-specific regulations)*

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 franking machine, view and change user profiles, and delete users (for detailed information, refer to chapter Manage users).

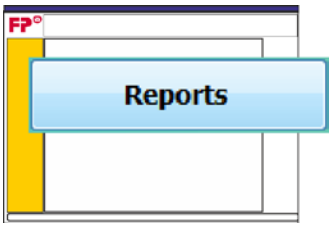
4.3 Transactions *(only NavigatorPlus)*



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.)

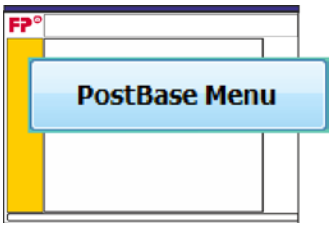
4.4 Reports *(only NavigatorPlus)*



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

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

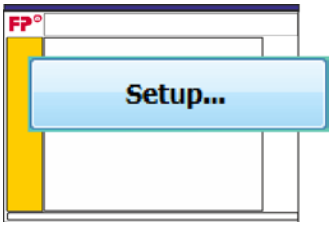
4.5 PostBase settings



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

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

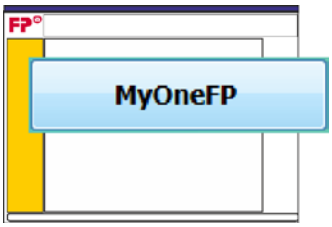
4.6 Software settings



In this menu, you define software settings, e.g. for printing reports.

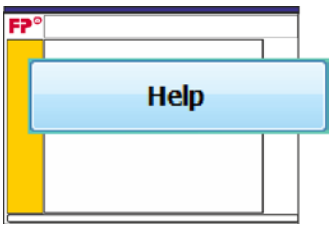
(For more detailed information, see Appendix.)

4.7 Connection to Francotyp-Postalia

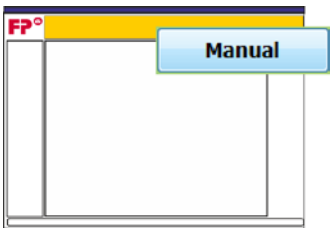


The PC program sets up a connection to Francotyp-Postalia's web portal. Through your account, you can order for example accessories for your PostBase and manage adverts.

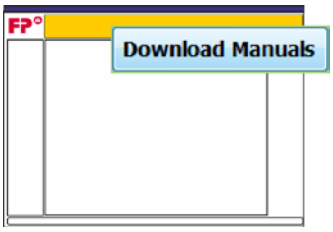
4.8 Help



If you run into problems while working with the program, click [Help].



The available user manuals are displayed.
Click the desired language / version. The software opens the selected user manual in the working area.



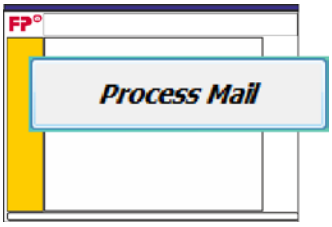
There are further languages / versions of the user manual available for download under [Download Manuals].

Click the desired language / version. The selected user manual is downloaded and available under [Manual] from then on.

TIP: If you need further help in troubleshooting, please consult the FP web page or contact Francotyp-Postalia.

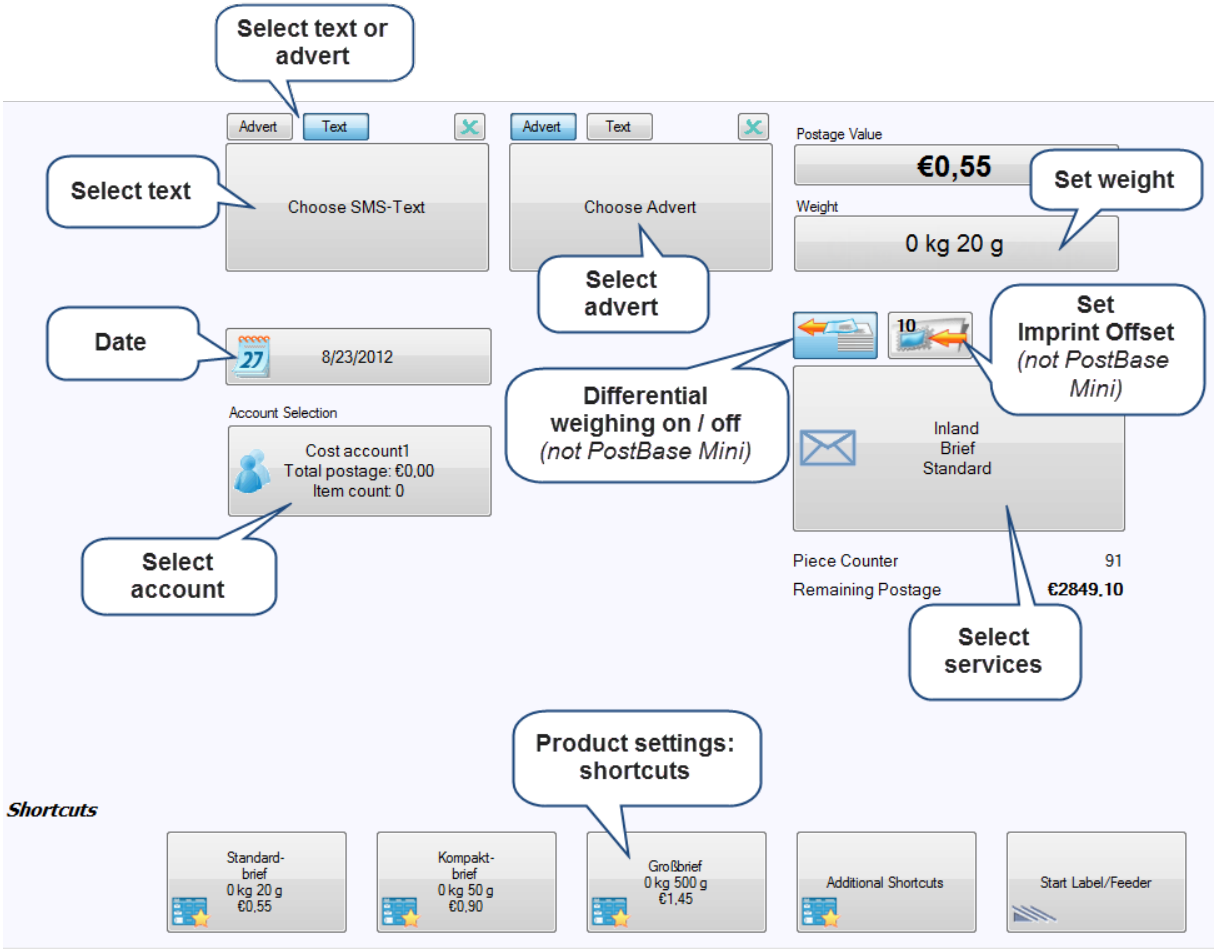
5 Franking settings

5.1 Overview



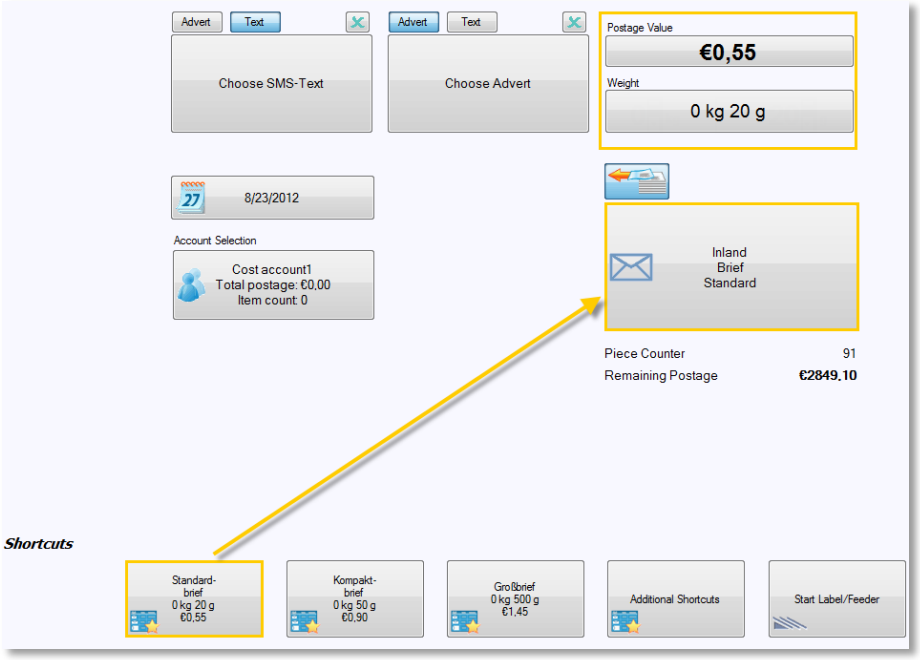
In the 'Process Mail' menu, you find your mail's characteristics.

Navigator synchronizes settings with PostBase when setting up a connection to the franking machine. The next section describes how to change the different settings.

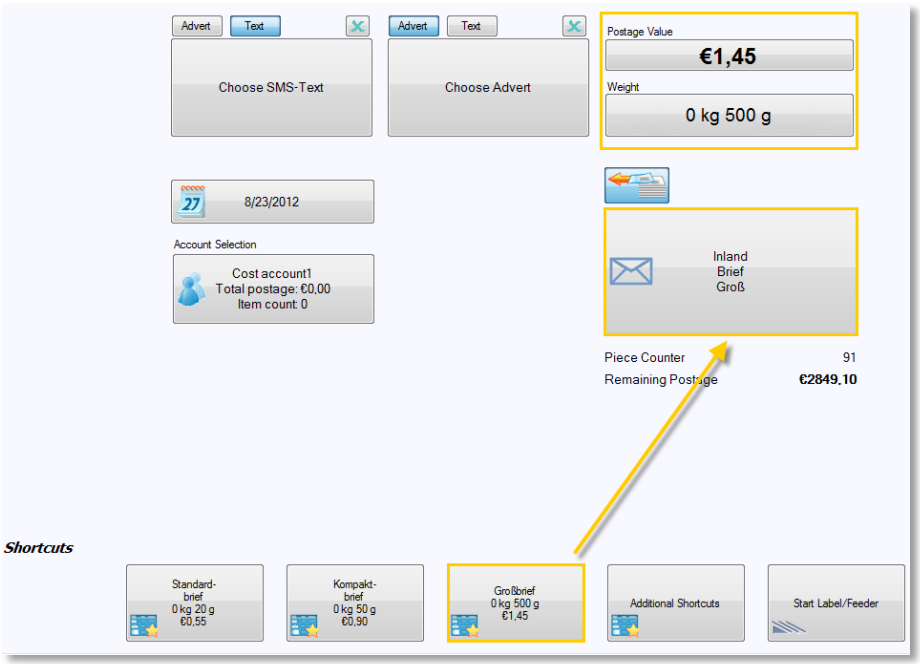


5.2 Product setting: Shortcut

Navigator directly offers the first three shortcuts (PostBase Mini: four) 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. Navigator 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

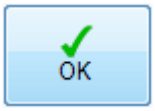
Click on the field for selecting services to set a product.

Navigator 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.

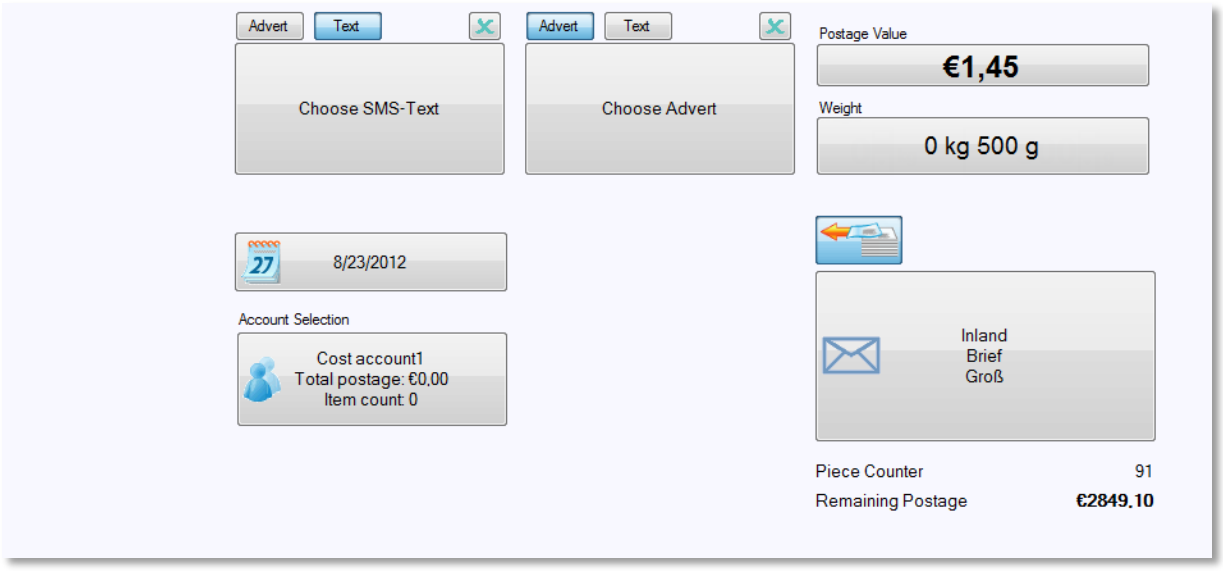
Select a service and click on the [Next] button. The program adopts your selection, offering further services.

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 franking.



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.)

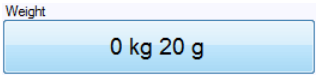
5.4 Set weight

5.4.1 Using the internal scale in normal mode

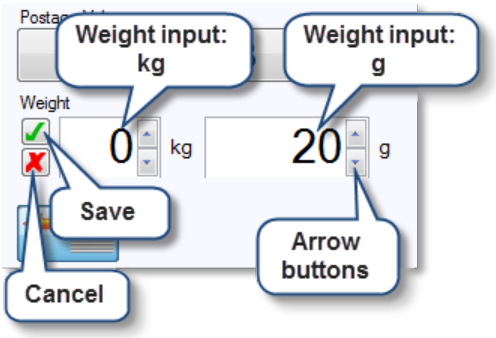
If you place the mail piece on the PostBase weighing platform, the program automatically transfers the weight value. In this case, you do not need to enter it manually. If you use the shortcut function, there is a preset weight value.

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.



In the 'Process Mail' menu, click on the field displaying the weight.



The software opens two input boxes (kilogram and gram) for the weight.

Click on the input box [kg].
Enter the desired value in kilograms via the PC keyboard.

Click on the input box [g].
Enter the desired value in grams via the PC keyboard.

You can also set both values via the arrow buttons.

Confirm your input.

5.4.3 Using the internal scale in differential weighing mode *(not PostBase Mini)*

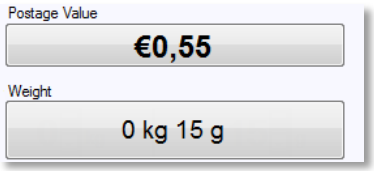
The differential weighing feature helps you save time weighing and franking large amounts of similar mail pieces. Mail pieces can easily be weighed by taking them from the letter stack on the weighing platform one at a time. PostBase then calculates the difference in weight, i.e. the individual weight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

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.



– Take one mail piece from the stack.

– Navigator displays weight and postage amount of this mail piece.

– Frank as described in chapter Franking.

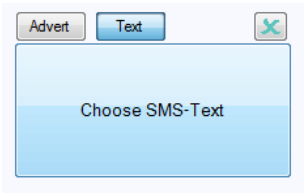
– Repeat this procedure with the other mail pieces.

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).

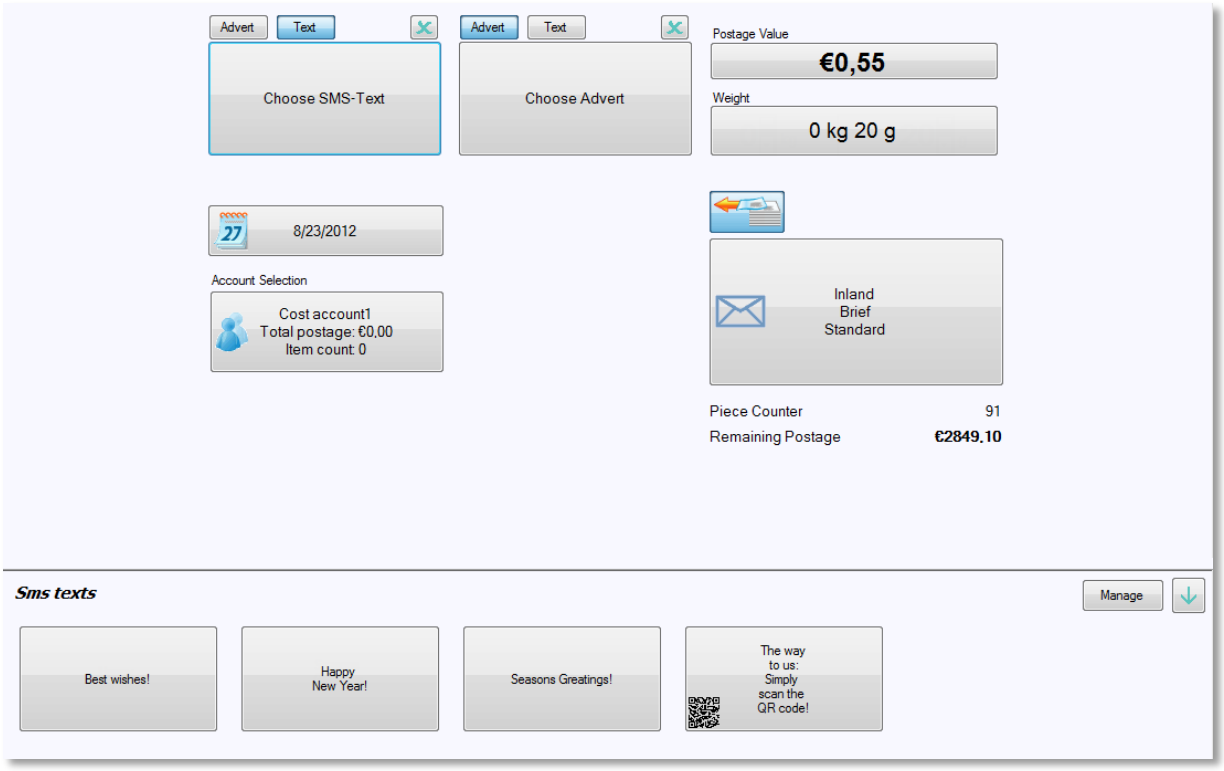
5.5 Select text message / QR code *(not in all countries)*

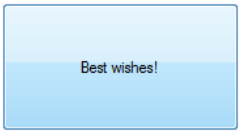


Click on [Text].

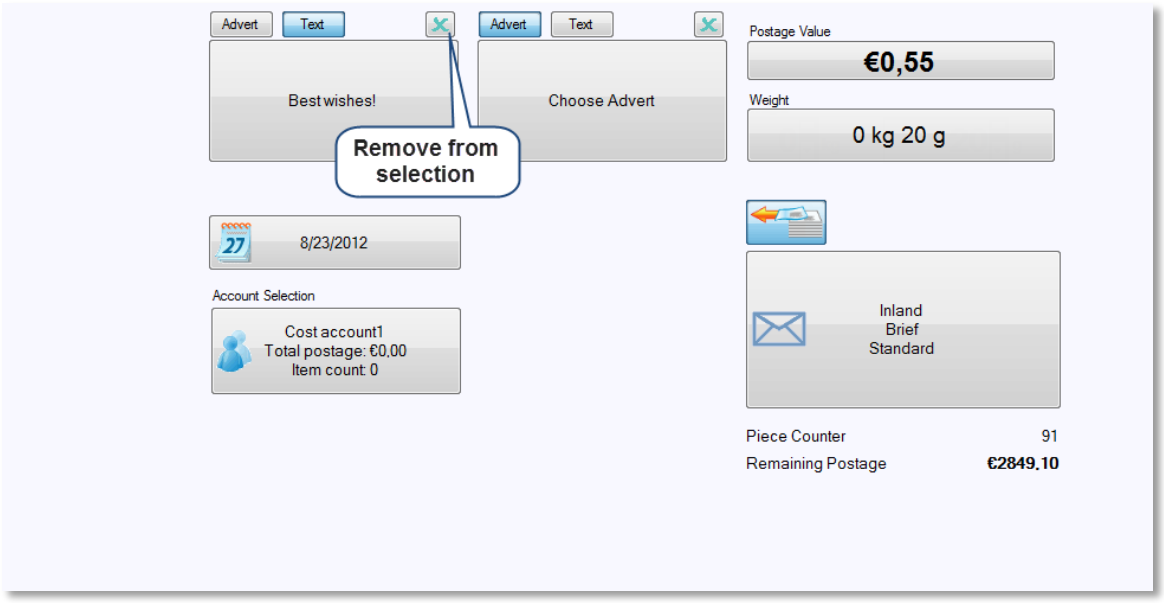
Click on the field for selecting text messages.

The ‘Sms texts’ menu opens in the lower part of the working area. It displays all available text messages and QR codes.

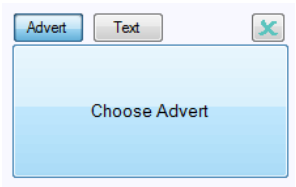




Select the desired text. The program adopts a text message closing the ‘Sms texts’ menu.



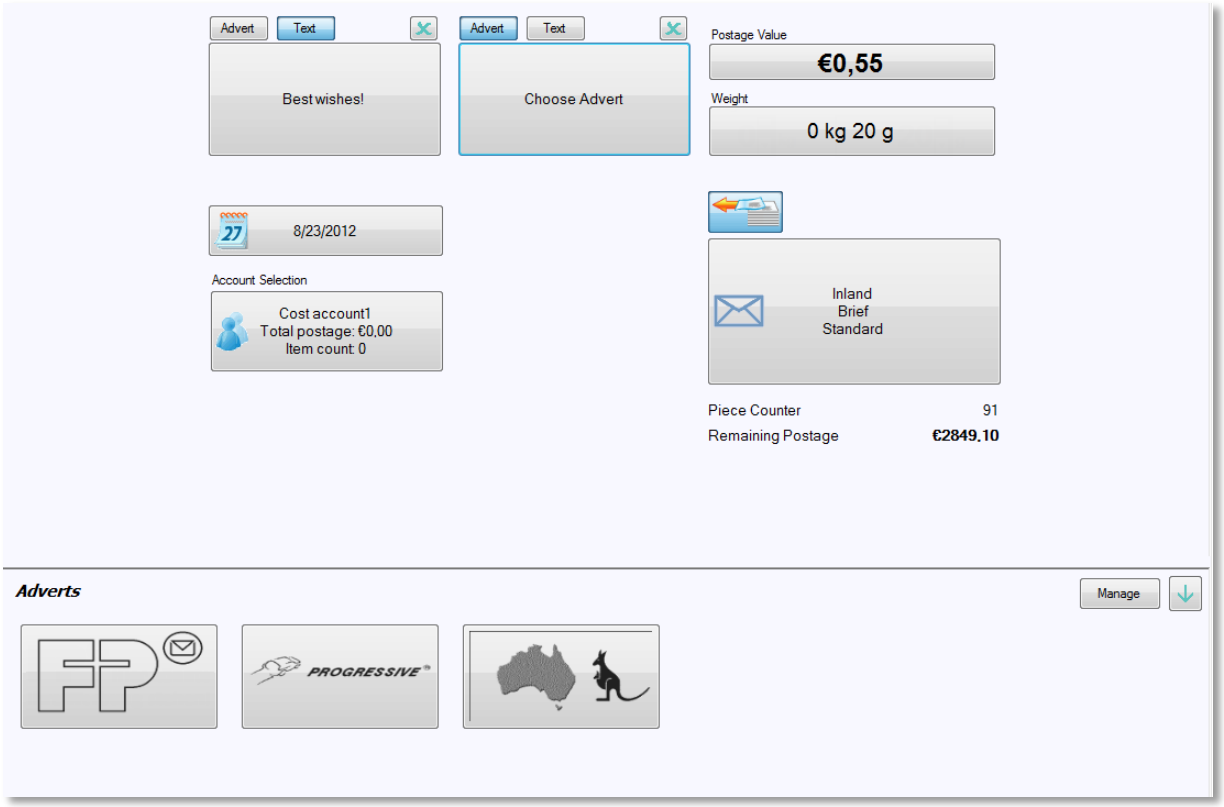
5.6 Select advert



Click on [Advert].

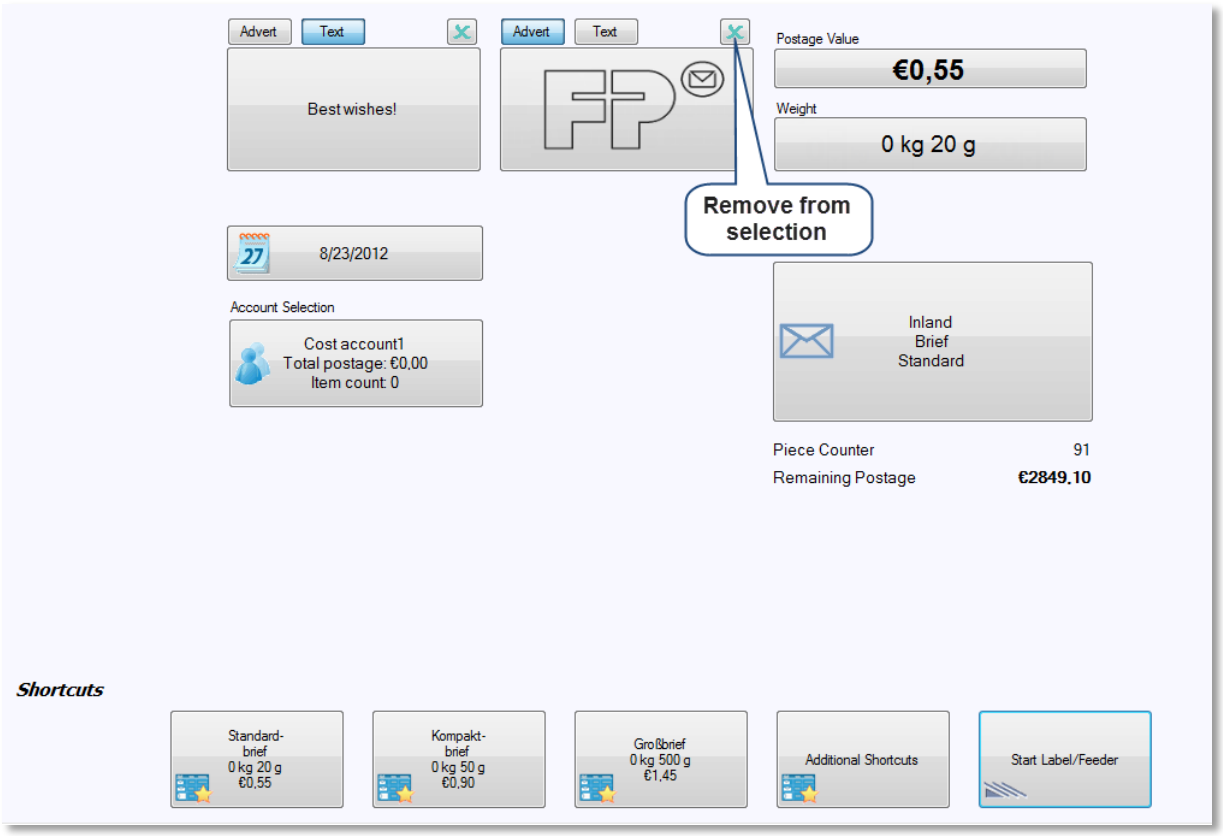
Click on the field for selecting adverts.

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

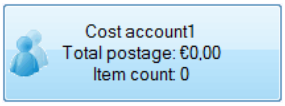


TIP: If you click [Manage], you have the possibility to download adverts from the FP portal (function is not available in all countries).

Select the desired advertising. Navigator adopts an advert closing the ‘Adverts’ menu.

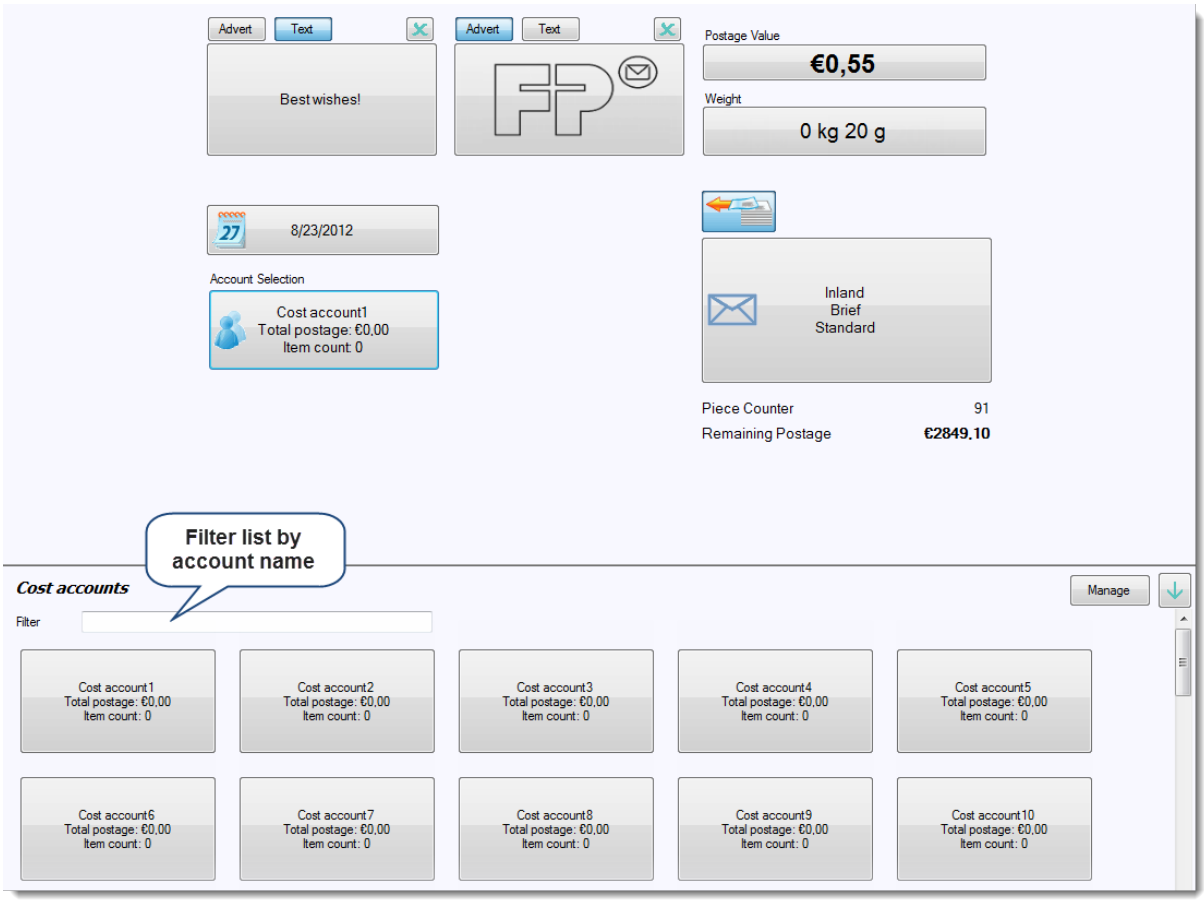


5.7 Select account



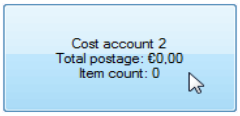
In the ‘Process Mail’ menu, the field for selecting accounts shows you the name of the active account. It also displays postage consumption and number of performed franking imprints. Select this field to change the account.

The ‘Cost accounts’ menu opens in the lower part of the working area. It displays all available accounts. If the user administration is active, only the accounts available to the current user are displayed.

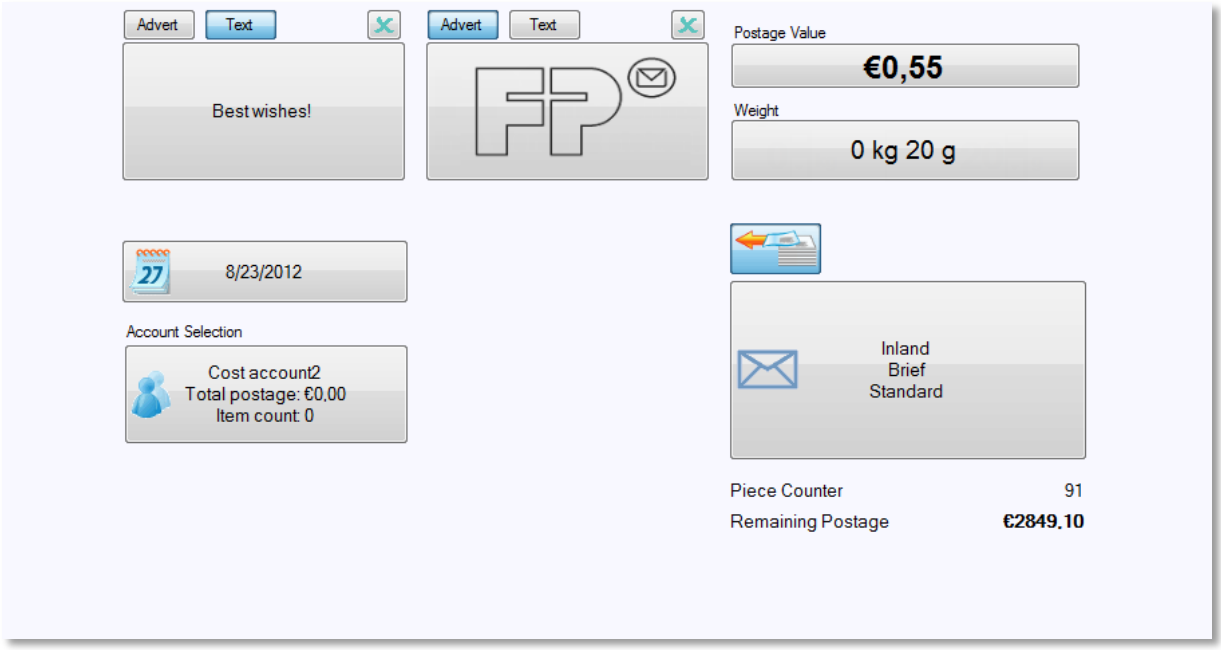


The filter feature allows for filtering the list by account names, thus easing the search in a long accounts list.

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

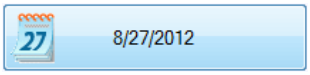


Select the desired account. Navigator adopts your selection closing the ‘Cost accounts’ menu.

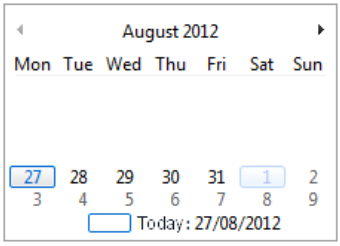


Note: If you need information on how to manage cost accounts, please refer to chapter Manage accounts.

5.8 Set date *(not in all countries)*



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



Navigator opens a calender window. It displays the allowable predating range. At the bottom of the window, you see the actual date.

Click on the desired date.

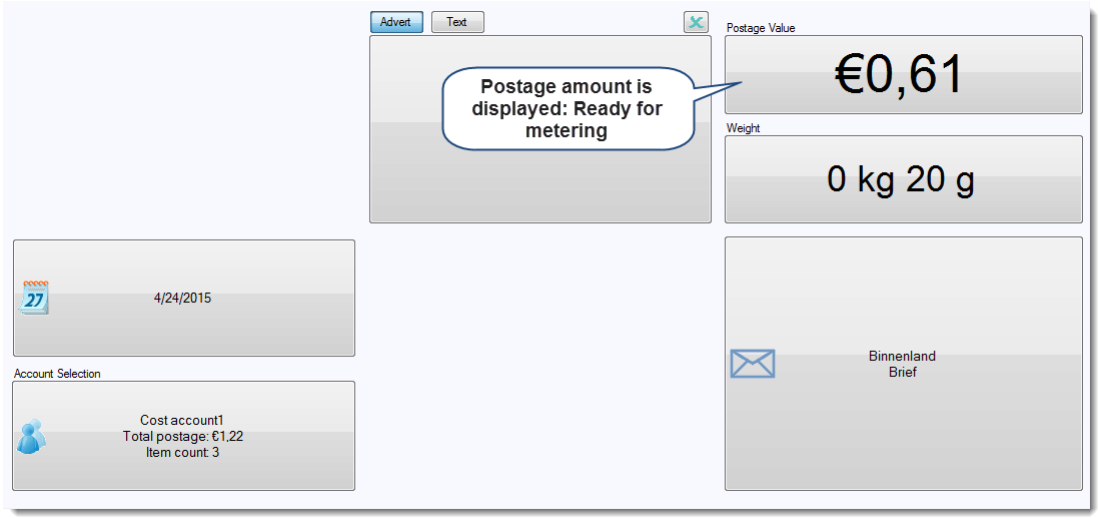
The new date of postage appears in the ‘Process Mail’ menu.

5.9 Franking

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

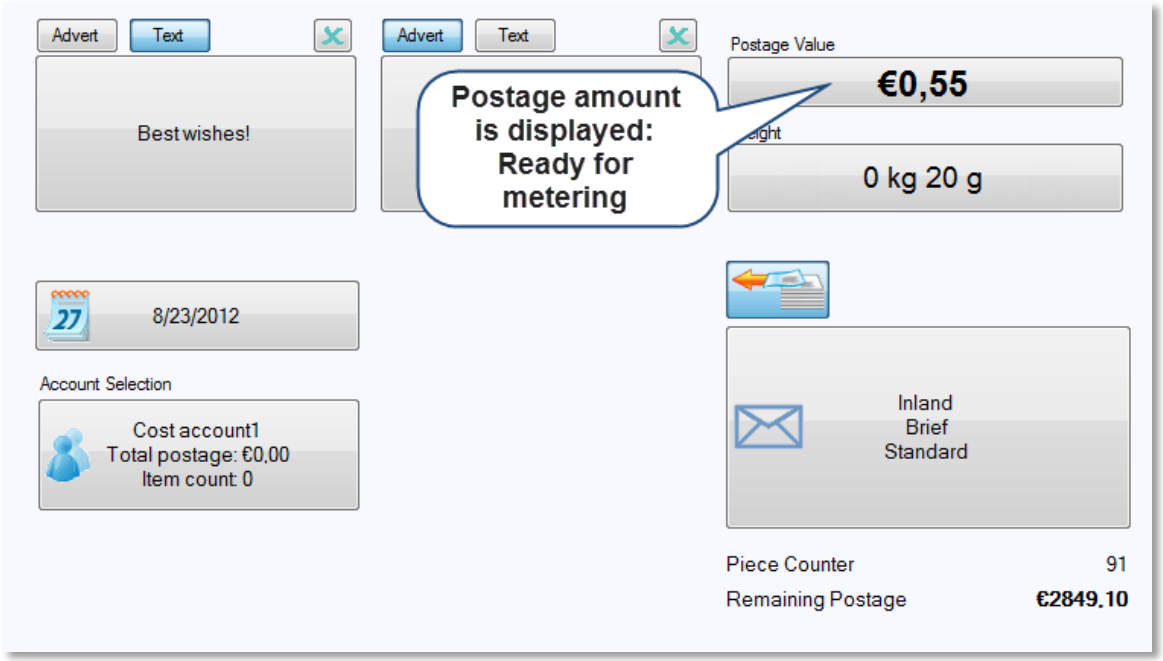
5.9.1 PostBase Mini

Navigator shows a screen as shown below. Position a mail piece to start the franking process.



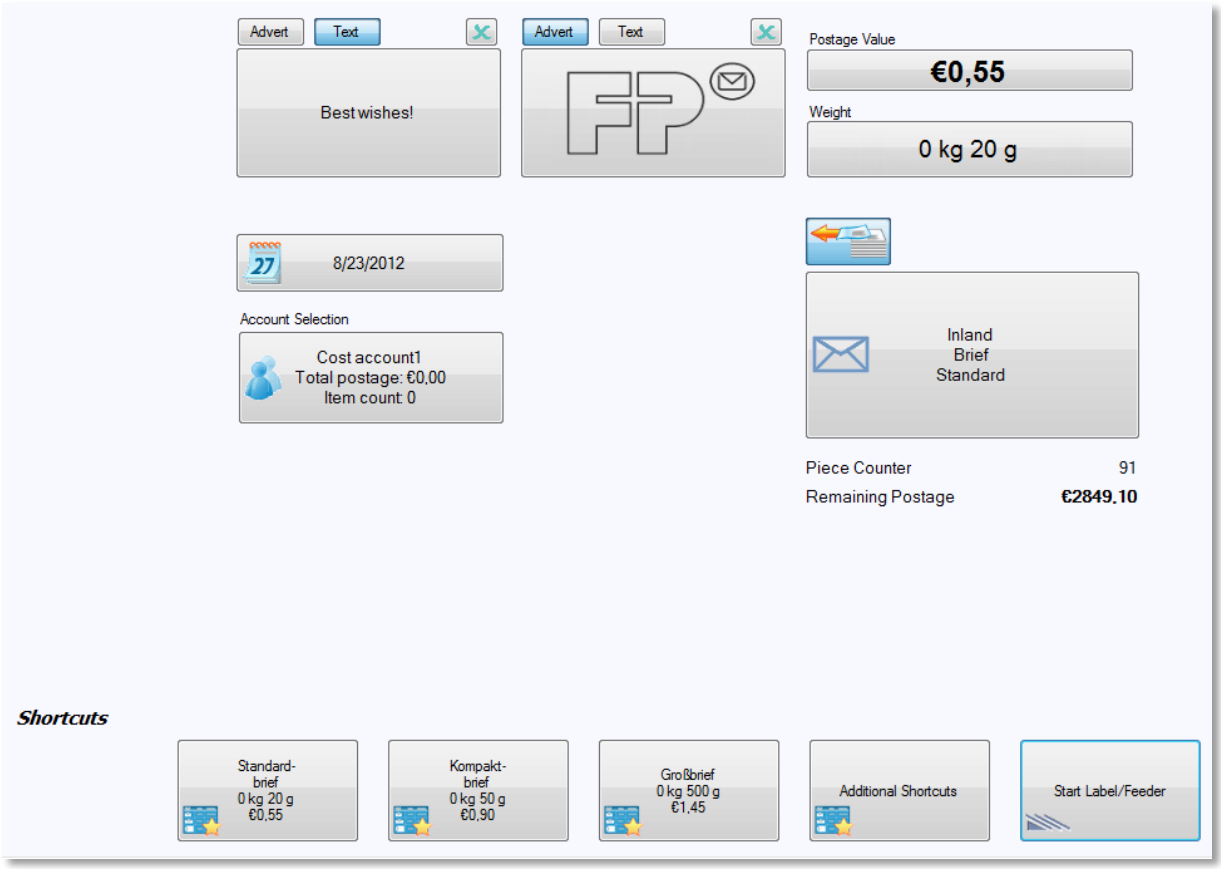
5.9.2 PostBase without Label dispenser / Automatic Feeder

Navigator shows a screen as shown below. Place a mail piece on the hand feed tray to start the franking process.



5.9.3 PostBase with Label dispenser / Automatic Feeder

Navigator shows a screen as shown below.

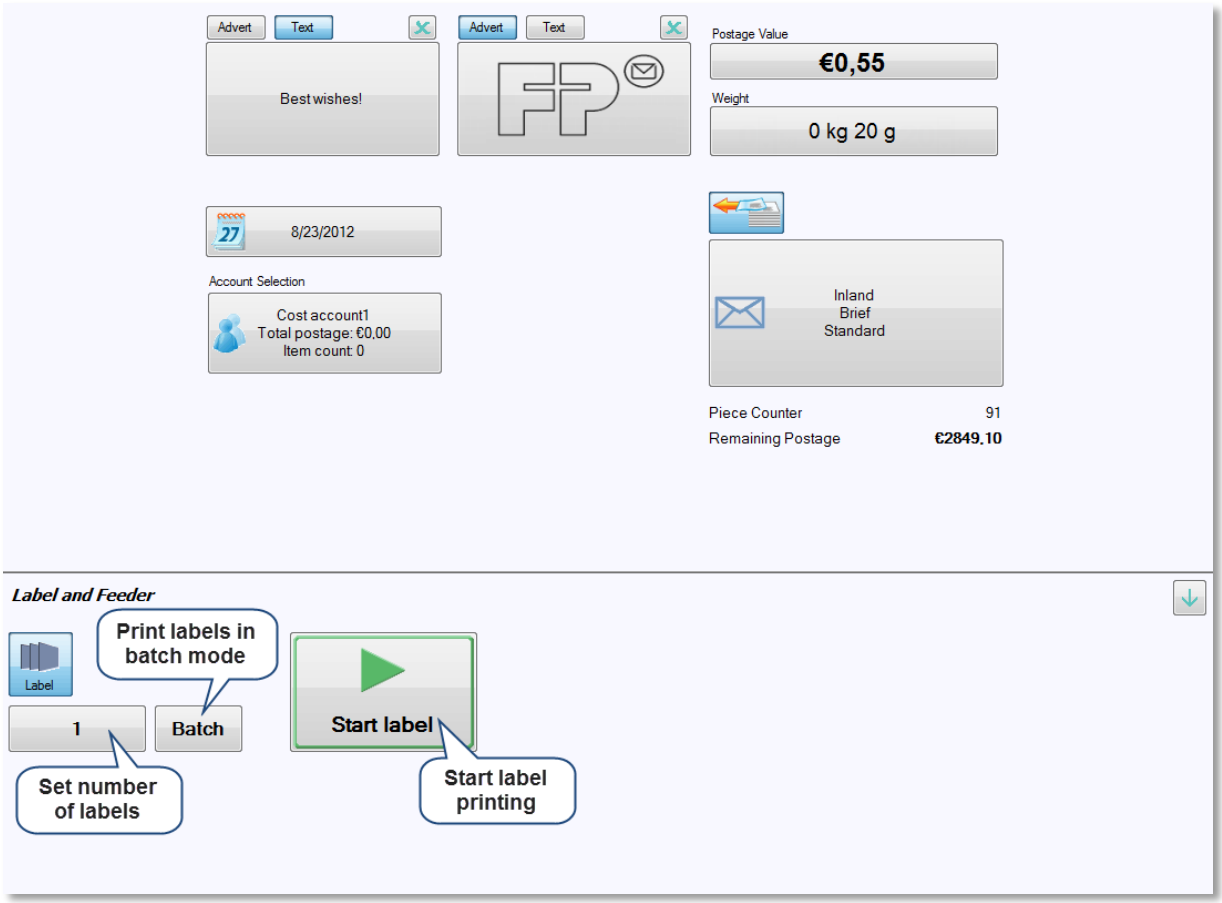


There are the following possibilities for starting the franking process:

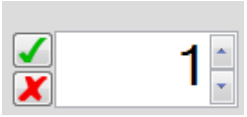
- Place a mail piece on the hand feed tray or automatic feeder.
- Start label printing from your PC using the [Start Label/Feeder] button.
- Start batch processing from your PC using the [Start Label/Feeder] button.
- Start label printing on the PostBase.
- Start batch processing on the PostBase.

Click on the [Label/Feeder] button to start franking 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.



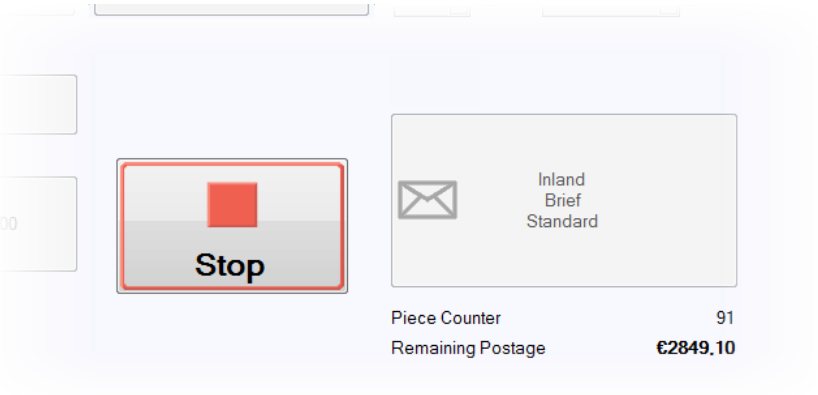
Type in the desired target count via PC keyboard.

You can also enter figures using the arrow buttons.

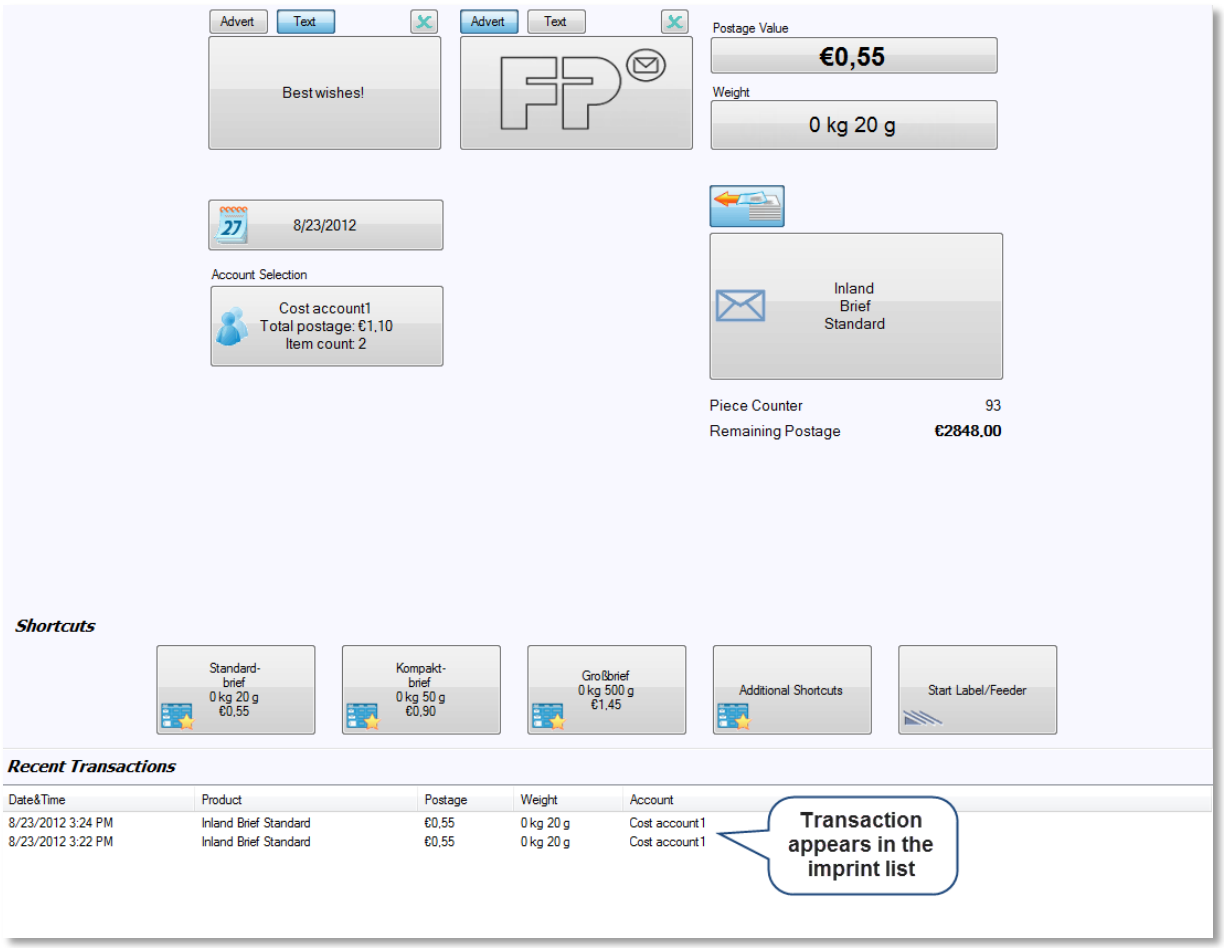
Save your entry.

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

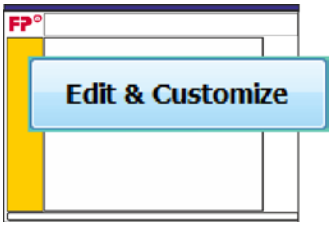
During operation, the following window is shown.



When the franking process is complete, the ‘Process Mail’ menu appears in the working area again. The franking appears in the imprint list.

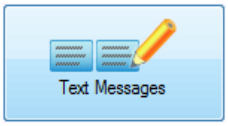


6 Manage texts *(not in all countries)*

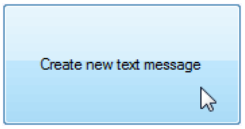


In the ‘Edit and Customize’ menu , you have the possibility to manage text messages and QR codes.

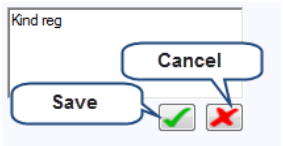
6.1 Enter a new text



Select [Text Messages].



Click on [Create new text message].

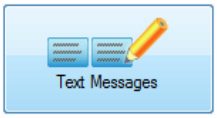


You can now enter a text of your choice.

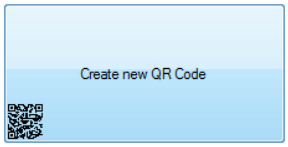
Save your entry.

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

6.2 Create a new QR code

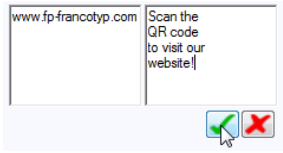


Select [Text Messages].



Click on [Create new QR Code].

In the left field, enter the URL that is to be encrypted in the QR code.

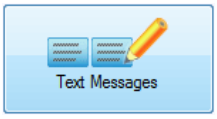


In the right field, enter a description to be printed in plain text next to the QR code.

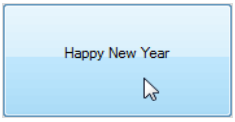
Confirm your entry.

6.3 Edit or delete a text / QR code

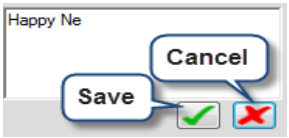
Edit a text / QR code



Select [Text Messages].



Click on the text or QR code you want to edit.

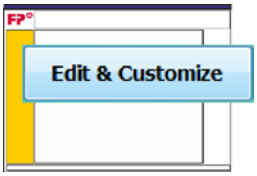


Navigator opens an input box for text. Enter a new text or a new URL and plain text description for the QR code.

Delete a text / QR code

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

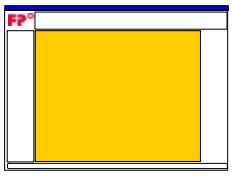
7 Manage shortcuts



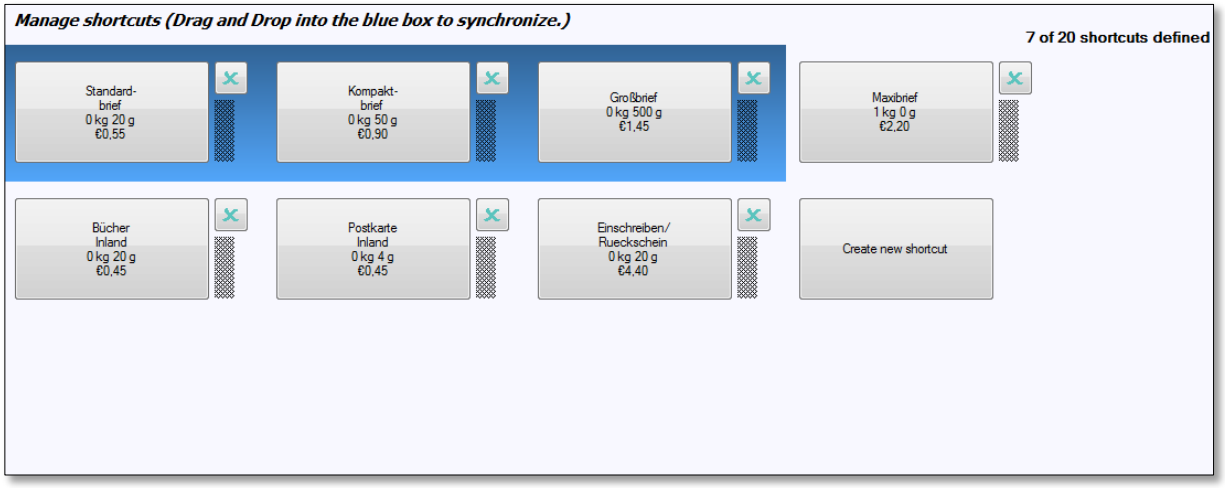
In the ‘Edit and Customize’ menu, you can manage shortcuts.

7.1 Create new shortcut

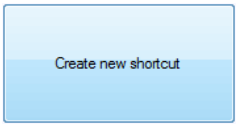
Select [Shortcuts].



All shortcuts appear in the working area.



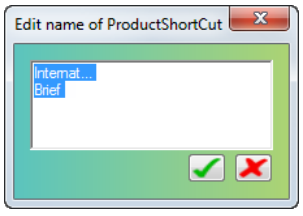
TIP: If you want to define a weight for your new shortcut, set a weight in the ‘Process Mail’ menu.



Click on [Create new shortcut].

Navigator 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 your entry.

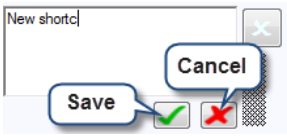
The new shortcut is now saved. You can store up to 20 different shortcuts.

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.



Navigator opens an input box for text. Enter a new name.

Confirm your entry.

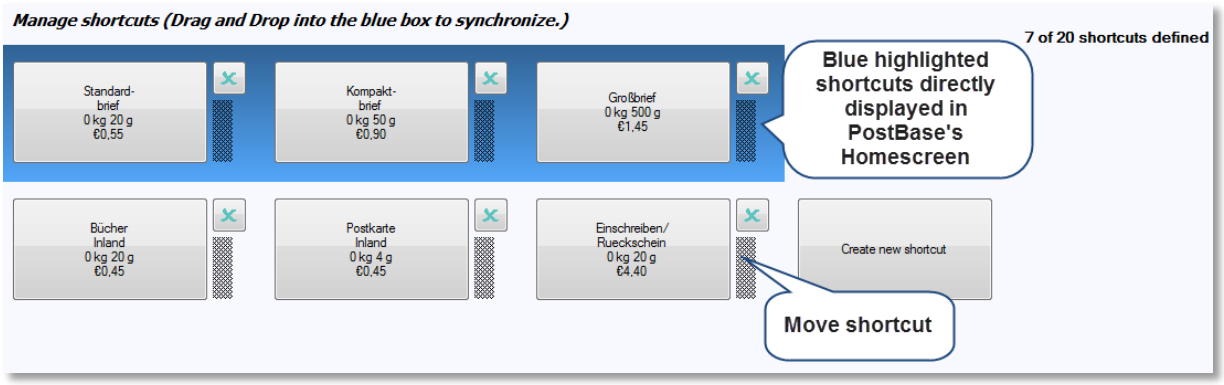
7.3 Resort shortcuts

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

Select [Shortcuts].

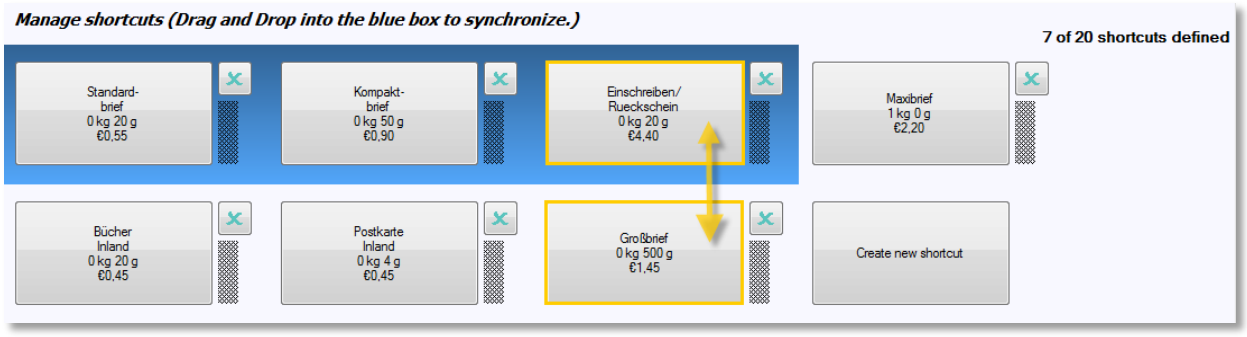
Depending on the equipment of your franking machine, either the first ten or all 20 shortcuts are transmitted to the PostBase.

The first three or four shortcuts in the list (depending on your franking machine) are directly available in the PostBase's Home screen. 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.

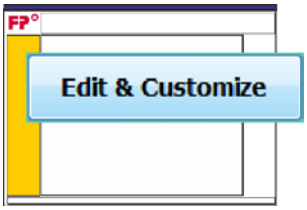


7.4 Delete shortcuts

Select [Shortcuts].

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

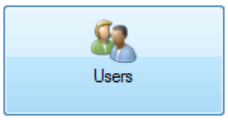
8 Manage users *(Administrator only)*



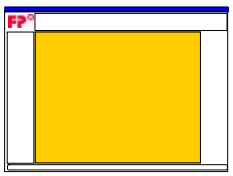
As Administrator, you can create users, set individual access rights for the respective users of the PostBase, view and change the user profiles, and delete users.

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.

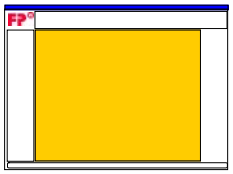
8.1 Overview



Click on [Users].



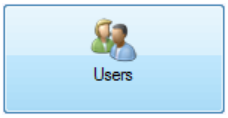
All users set up so far are displayed in the working area.



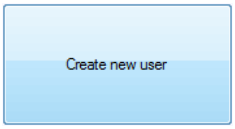
In the working area, you can:

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

8.2 Create new user

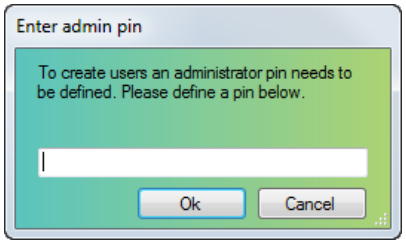


Click on [Users].



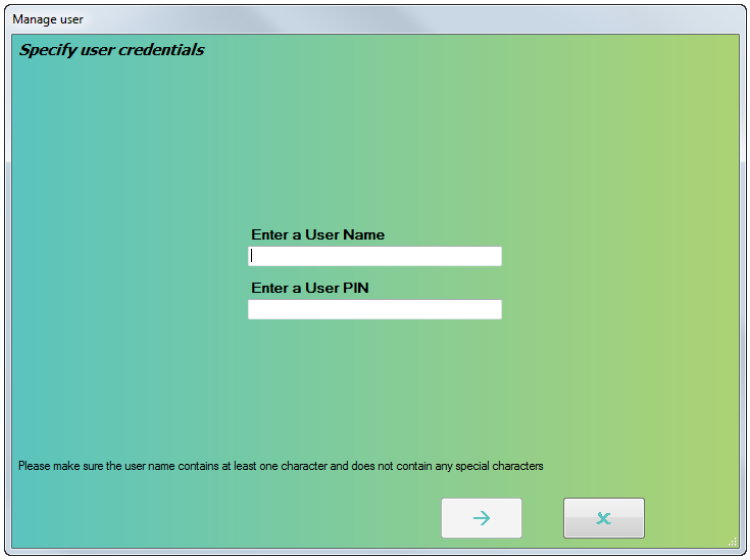
Click on [Create new user].

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



Navigator opens the user settings wizard. Follow the steps of the wizard.

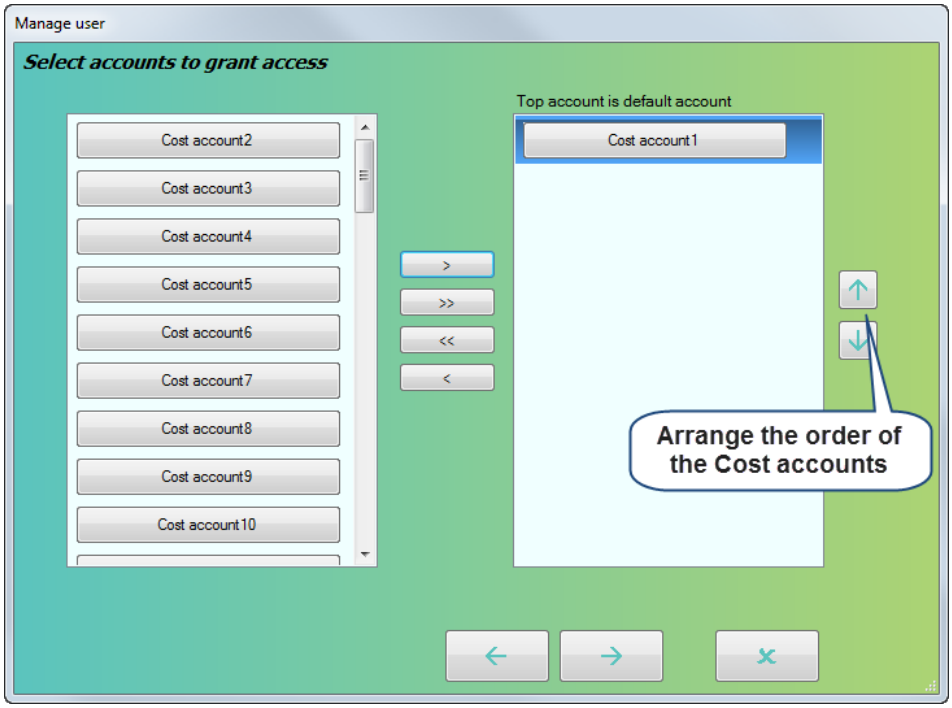
Enter name / PIN



Enter the desired user name and user PIN.

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

Assign accounts

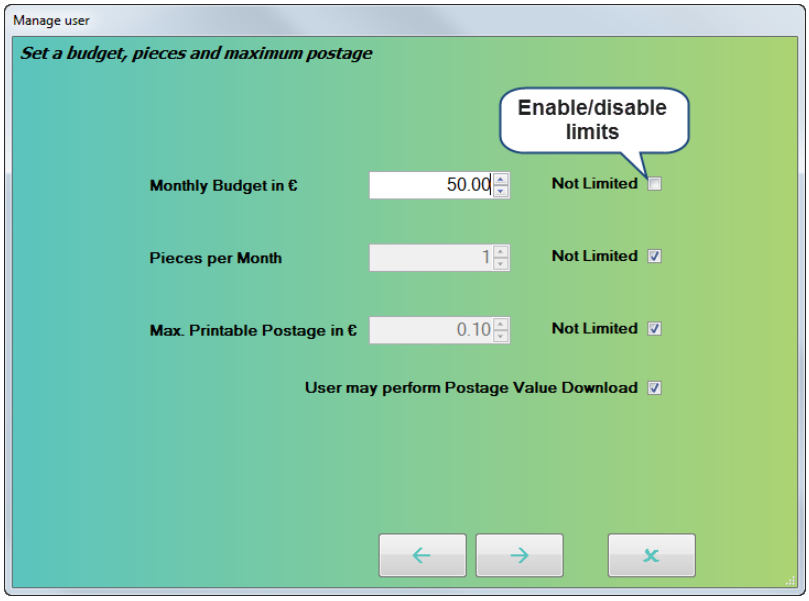


Select the accounts which the user should have access to (at least one).
Use the [>] / [>>] buttons to grant access to the marked / to all accounts (or the [<] / [<<] buttons to remove the marked / all accounts from the list).

TIP: You can drag and drop the accounts.

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

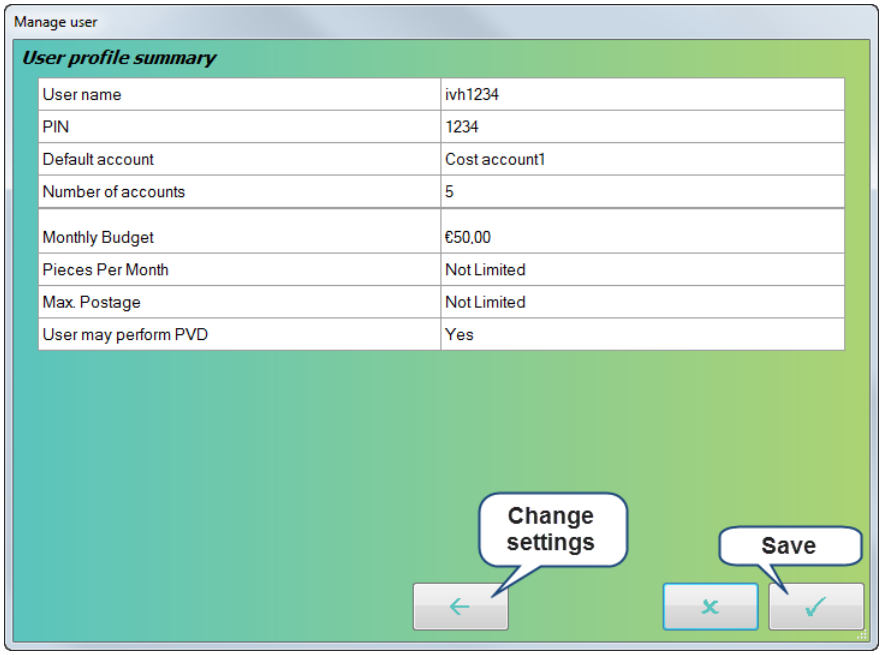
Set budgets and maximum values



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

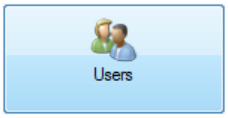
Proceed to the next step of the settings with [→].

Navigator shows a summary of the user settings.

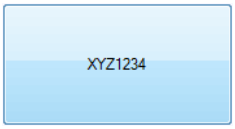


Save the settings. The user settings wizard is closed.

8.3 Edit user



Click on [Users].



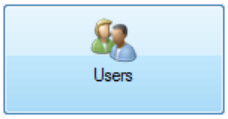
Click on the user you want to edit.

Navigator shows the current user profile.

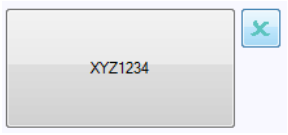
Click on the button with the pen.

Navigator 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



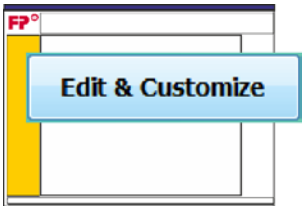
Click on [Users].



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!

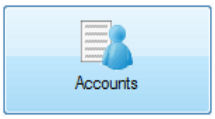
9 Manage accounts



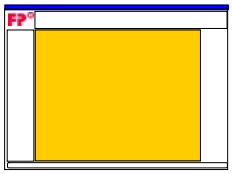
In the ‘Edit and Customize’ menu, you can manage accounts.

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.

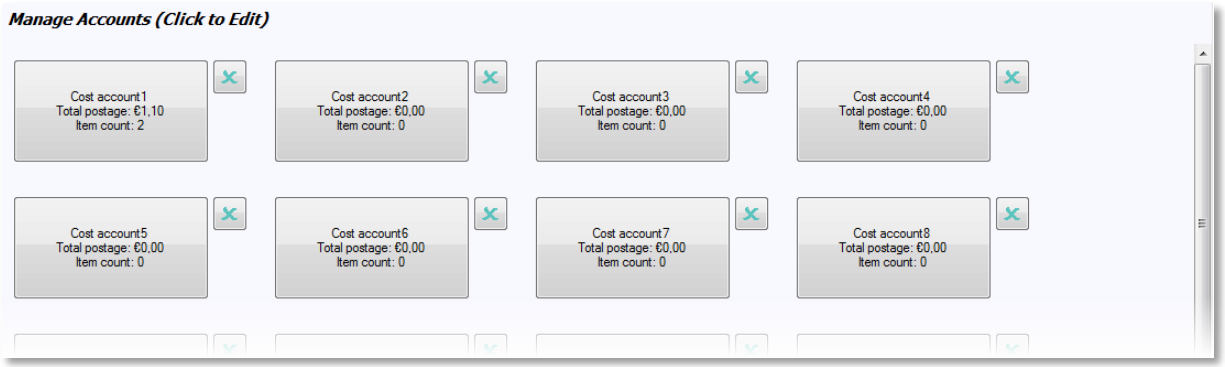
9.1 Overview

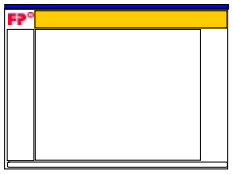


Select [Accounts].



All accounts are displayed in the working area.

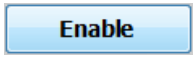




In the secondary menu, different functions are available:

- 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.

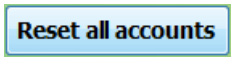
Disable cost accounts: Click the [Disable] button in the secondary menu. Every cost account will be cleared by this action.

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.

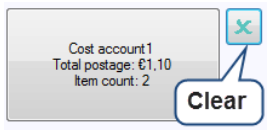
9.4 Reset / clear all accounts



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.

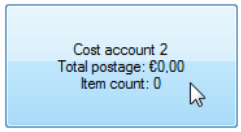
Reset all accounts to zero. The consumption data of all accounts is reset. Account names remain unchanged.

Clear a single account



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

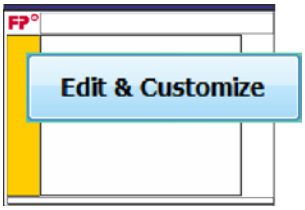
9.5 Rename accounts



Click on the account you want to rename.

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

10 Manage adverts

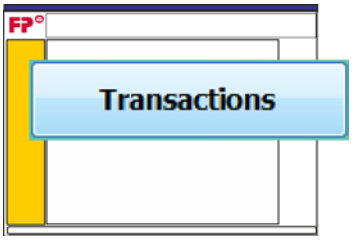


In the ‘Edit and Customize’ menu, you can manage adverts. For the administration of the advertisings, please refer to the FP Portal. Here you find all Logos available for download *(function is not available in all countries)*.

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

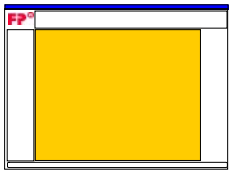
TIP: The ‘Adverts’ menu includes a link to the PostBase Advert Designer in the FP Portal. Here you can create an individual advert (if available in your country).
The assessment and approval of adverts is subject to country-specific regulations.

11 Transaction administration *(only NavigatorPlus)*

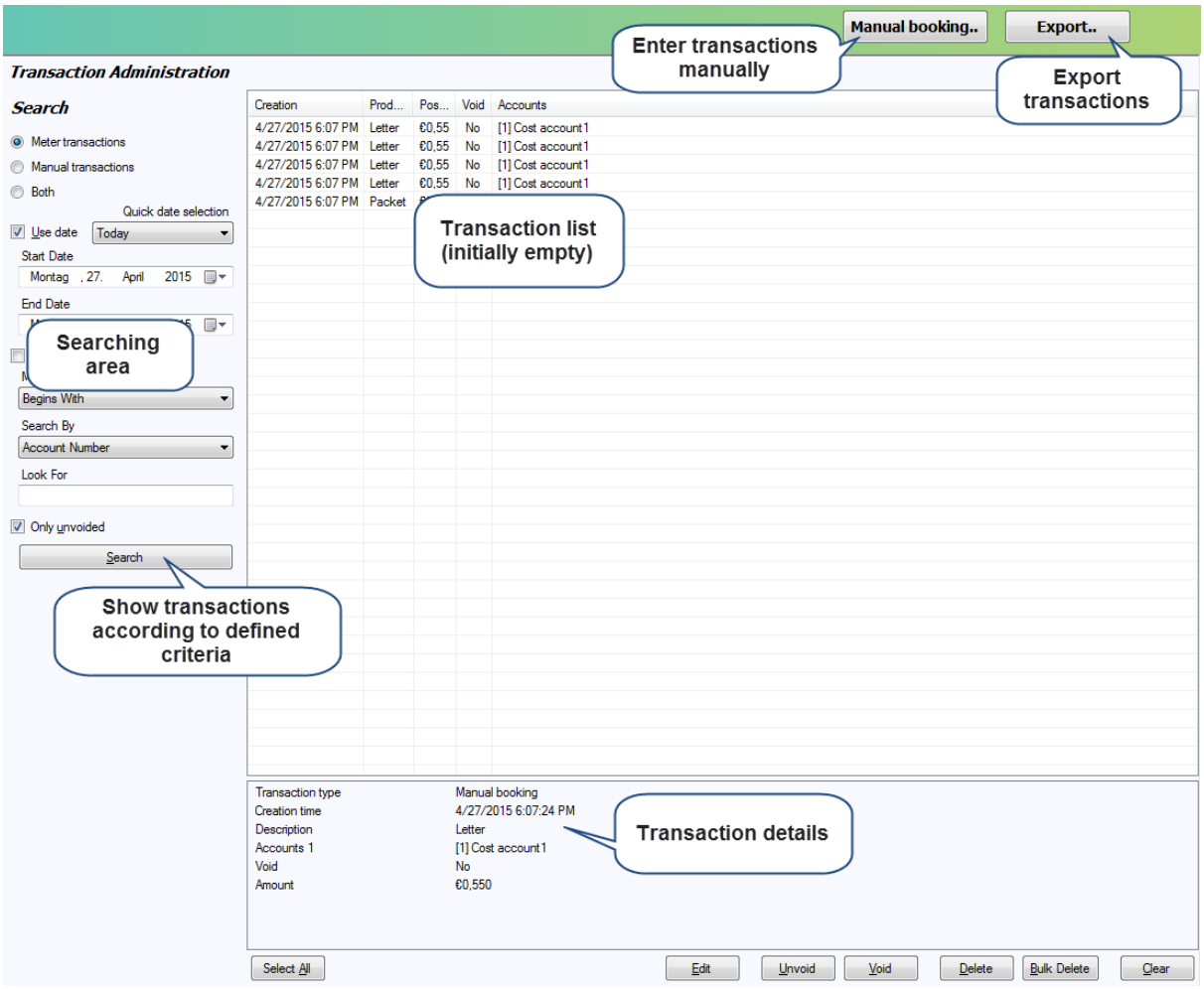


Every time you frank a piece of mail, a transaction will be logged by NavigatorPlus.
The 'Transactions' menu gives you a full picture of all your mailing activity, e.g. when any particular piece of mail was sent. All transactions are stored in the NavigatorPlus database and used to generate reports.

11.1 Overview



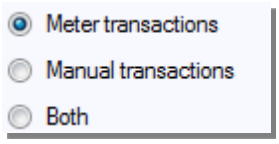
The 'Transaction Administration' menu opens up in the working area.



11.2 Search and view transactions

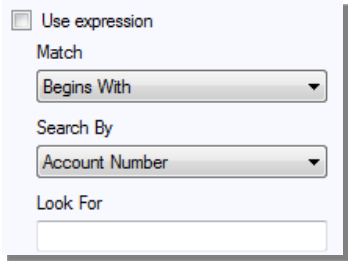
Transaction search

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.

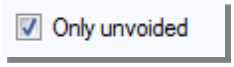


Choose between Meter transactions [franking transactions] and Manual transactions or tick 'Both'.

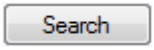
Choose a time period via 'Quick date selection' or enter an exact date or period. You can also untick the time criterion.



You might as well search by expression.



Untick this box to view voided transactions.

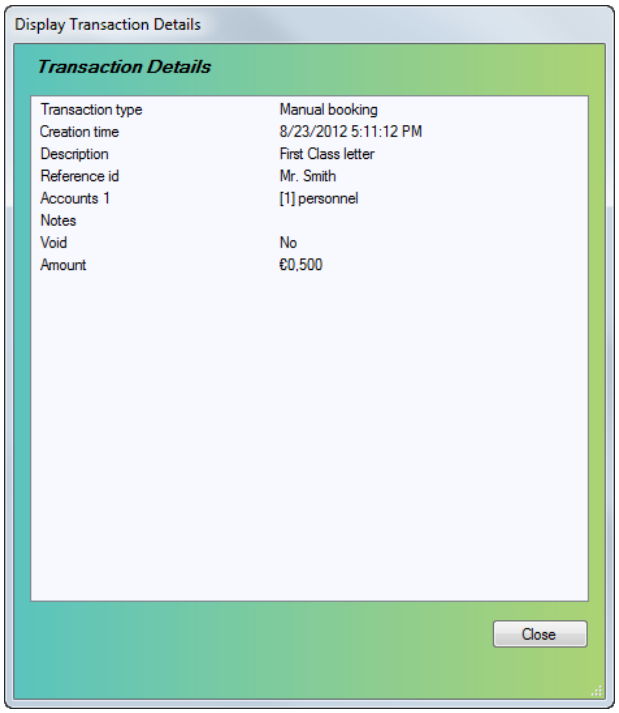


When the desired search criteria are set, click on [Search].

Show transaction details

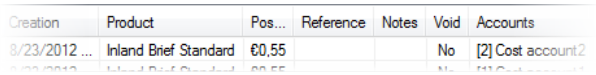
Double click a transaction row in the transaction list.

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



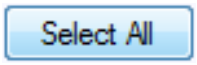
11.3 Handle transactions

11.3.1 Edit transactions



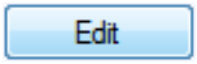
Select the transactions you wish to edit

OR



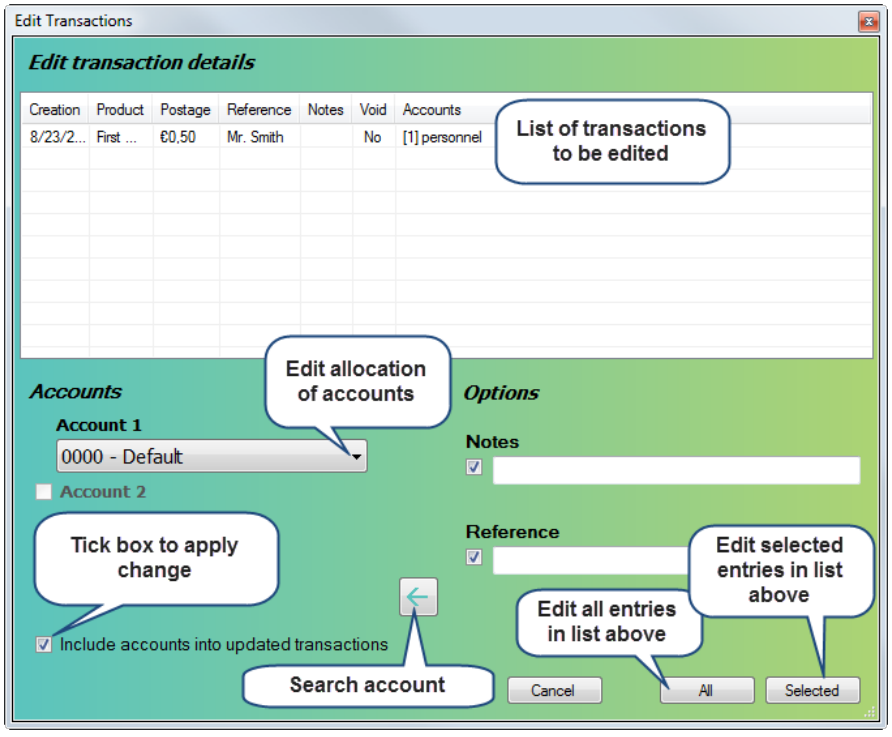
Click [Select All] to select all transactions.

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



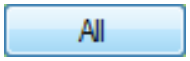
Click on [Edit].

NavigatorPlus opens an 'Edit Transactions' Wizard.



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

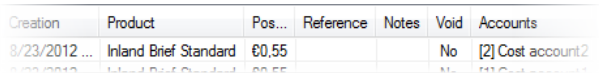
With the [Selected] button you confirm the changes for the selected entries in the transaction list.



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

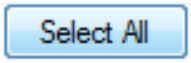
The transaction list in the 'Transaction Administration' menu shows the new data.

11.3.2 Void / unvoid transactions

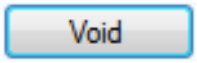


Select the transactions you wish to void, unvoid or delete

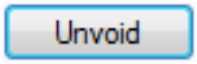
OR



Click [Select All] to select all transactions.



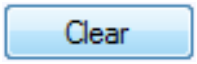
Click [Void] to exclude transactions from the reports.



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

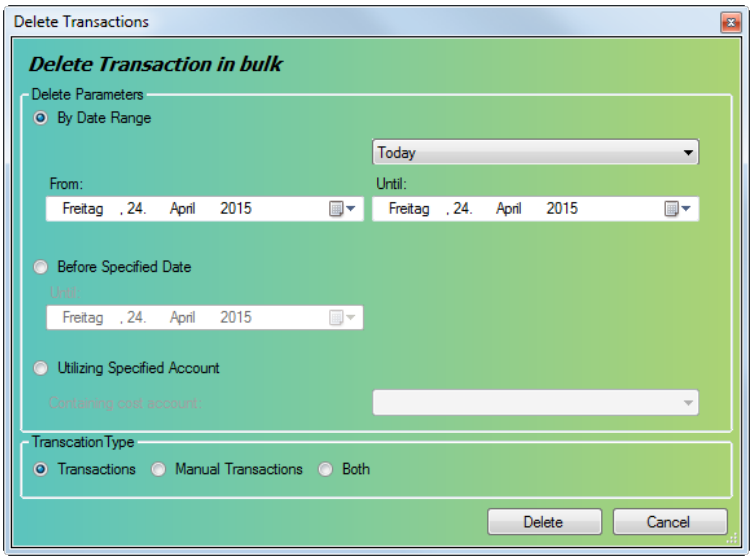
11.3.3 Delete / clear transactions

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



Click [Clear] to remove all transactions.

Click on [Bulk Delete] to delete transactions based on definable criteria.



Select the date range, date, or account, as well as the transaction type for which you want to delete all transactions.

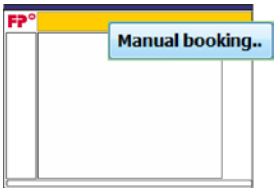
With [Delete], all transactions that fit the set criteria are deleted after a security prompt.

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

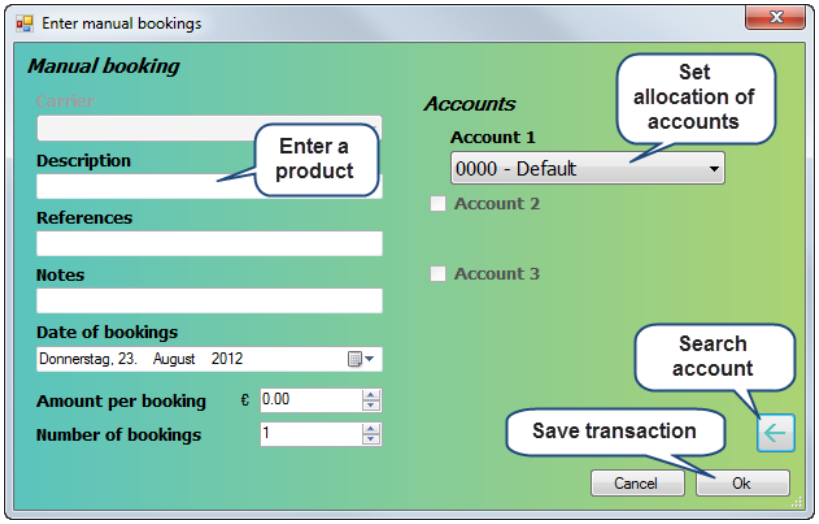
For different reasons you might use PostBase to frank mail independently of NavigatorPlus (known as offline postage).
Furthermore, there are mail items booked independently from the frankings, e.g. general administration fees of post offices or special services such as inserting etc. You can book these transactions manually as well.

To enter transactions manually, proceed as follows:

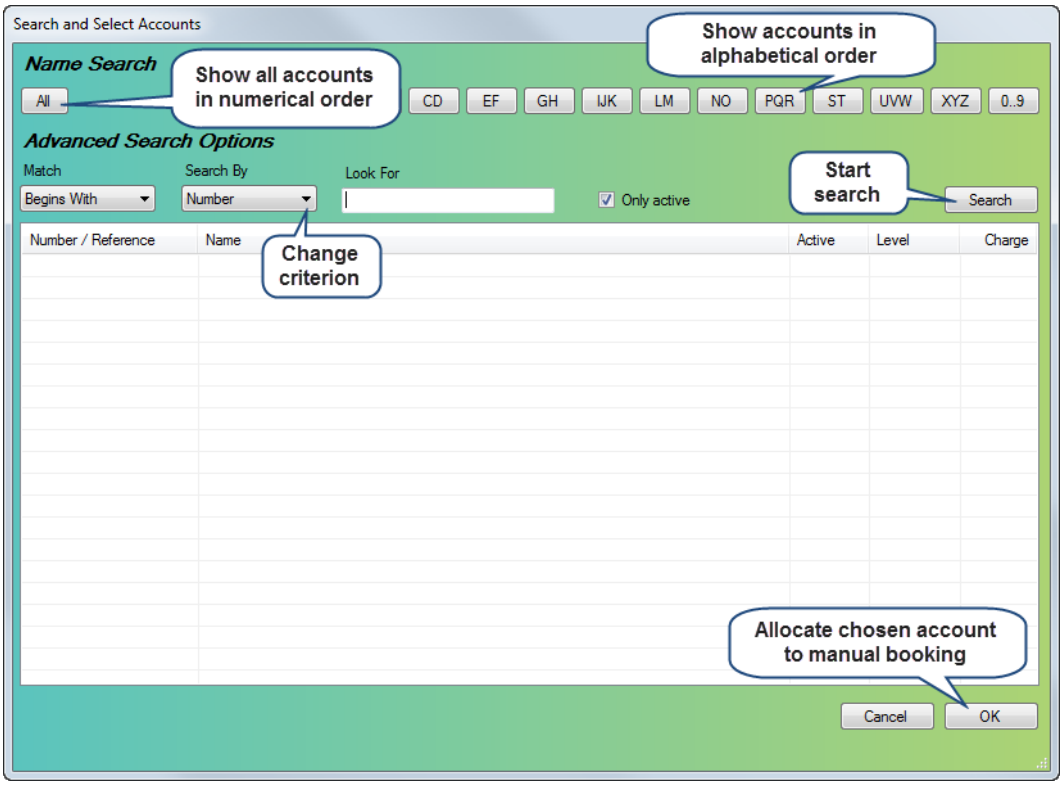


Click [Manual Booking..] in the secondary menu.

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

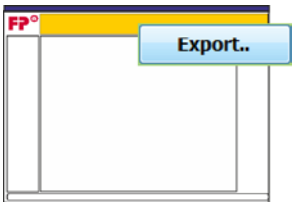


Note: The 'Name Search' pop up opens when you click on *in the 'Enter manual bookings' window. You can methodically search for the desired account. With [OK] you quit the search and assign the account. You then return to the 'Manual booking' window.*



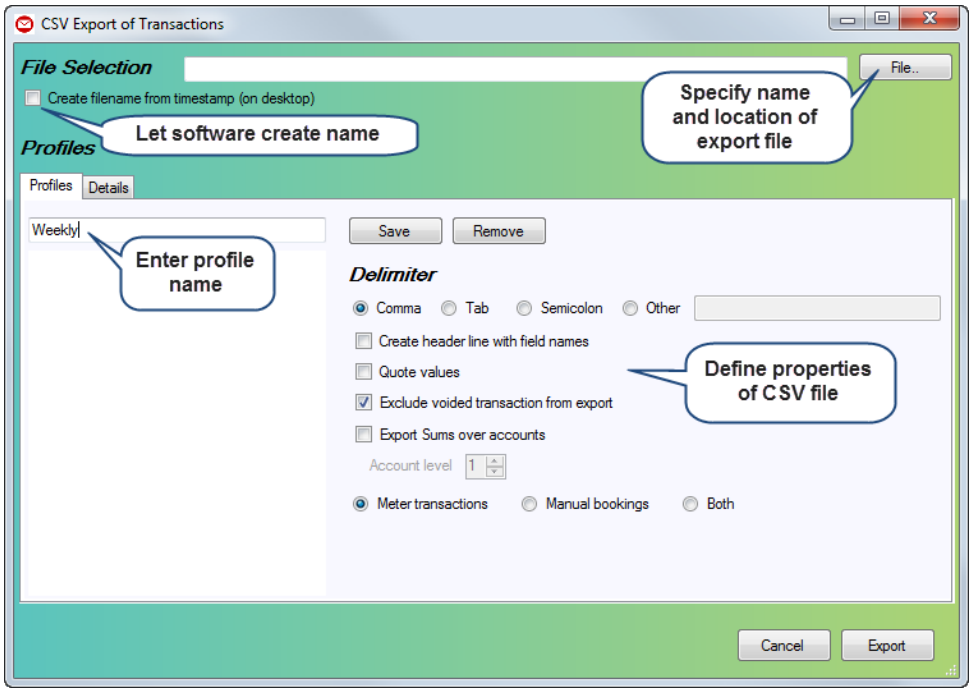
11.5 Export transactions

You may want to examine the transactions in other formats than given in the NavigatorPlus 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.



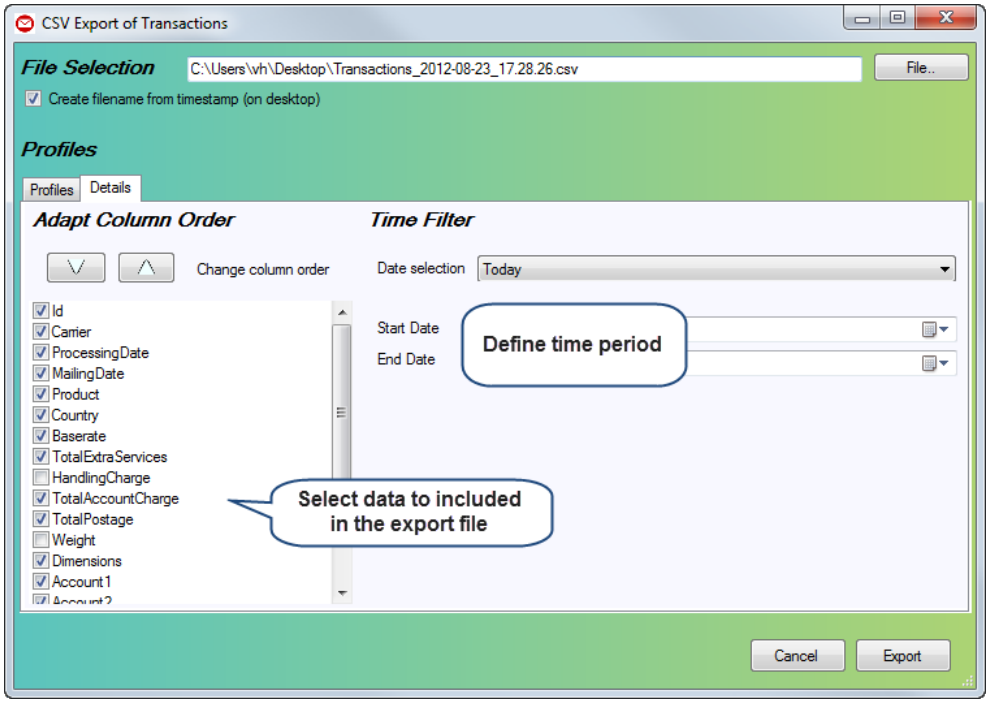
Click [Export..] in the secondary menu.

NavigatorPlus 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.

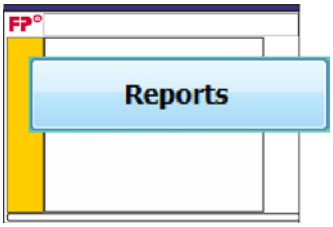


Note: CSV ('Comma Separated Values') is a simple format consisting of rows of data. Each row holds the various fields of data needed to define a transaction. The individual pieces of data (date, account, etc.) in a row are separated by a particular character. In the delimiters section, you specify this 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 NavigatorPlus)*



NavigatorPlus enables you to generate different types of reports.

Note: The reports function only registers mail pieces that you frank in PC mode (Navigator mode) with you PostBase. Importing data on frankings after the fact is not possible.

12.1 Types of reports

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

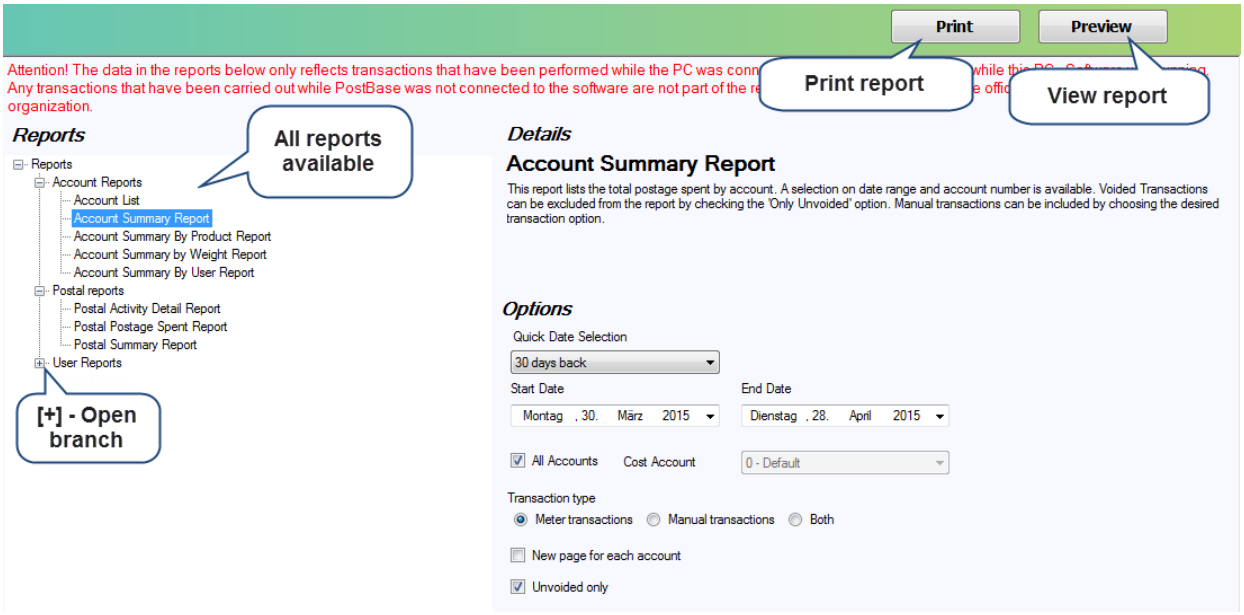
Postal Reports show you on what postal products you postage costs have been spent over a given period. The information is presented in both chart and tabular formats.

User Reports give an overview on all users you have set up and show details on the user profiles and consumption data. You can create detailed reports on postage costs, sorted by postal products, by weight classes, or by accounts.

Note: Manual transactions are excluded from some 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.

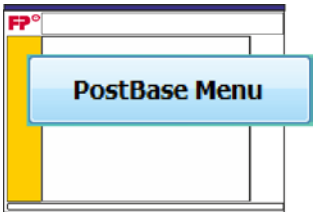


Click [Preview] to see the report.

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.

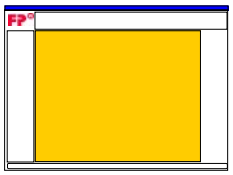
13 PostBase Setup and special functions



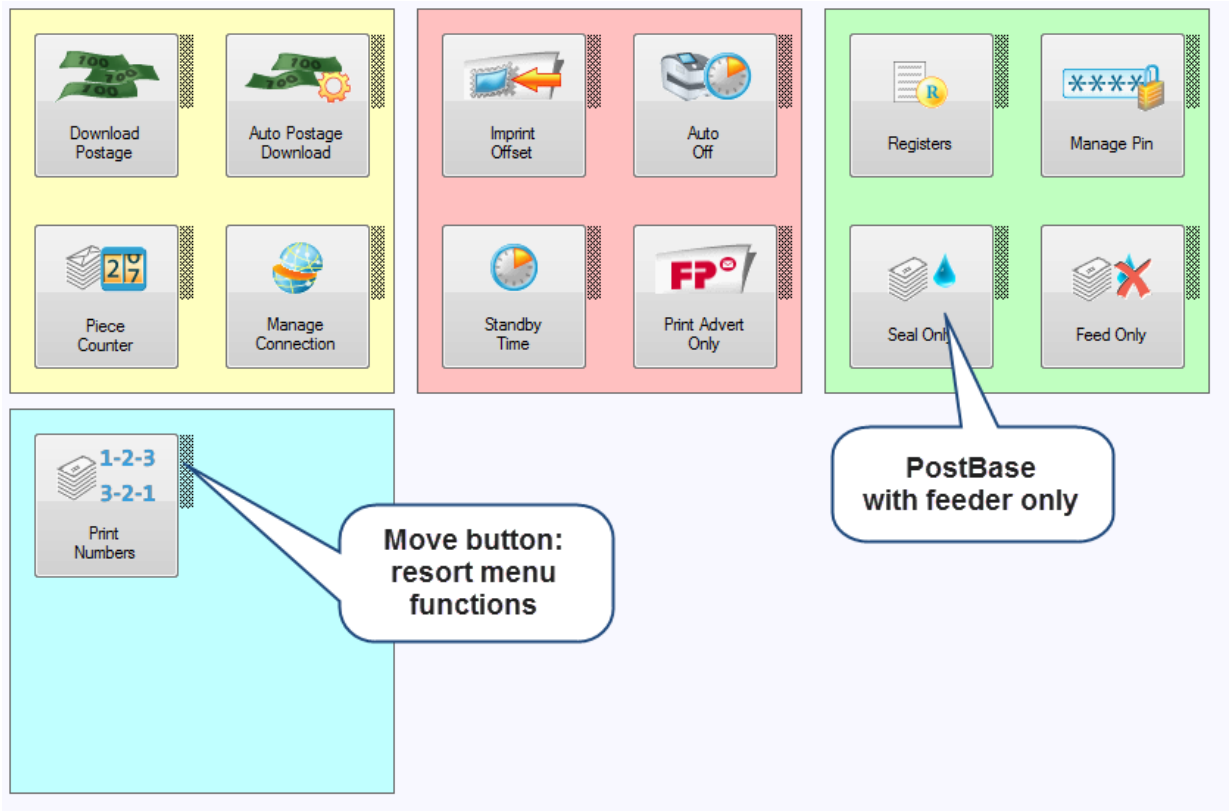
Navigator enables you to make selected PostBase settings from your PC.

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

13.1 Overview

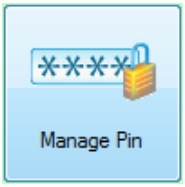


The 'PostBase Menu' is displayed in the working area.



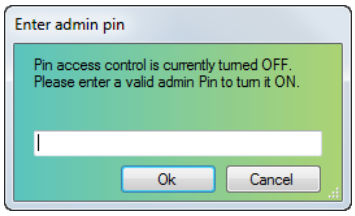
TIP: You can re-sort the PostBase menu functions according to your wishes.

13.2 Access control / PIN



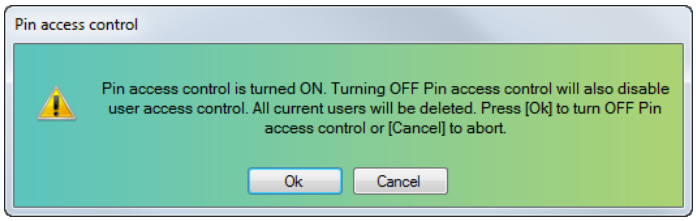
Click on [Manage Pin] in the PostBase Menu. Protect your access against unauthorized use.

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.

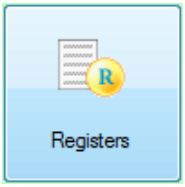
Deactivate access control



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] in the PostBase Menu. You are given an overview on your postage credit, the control total, the total of all frankings, and the last postage download amount.

13.4 Load postage *(not in all countries)*

Select [Download postage] in the PostBase Menu. 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 *(not in all countries)*

Select [Auto Postage Download] in the PostBase Menu. 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

Select [Piece Counter] in the PostBase Menu.

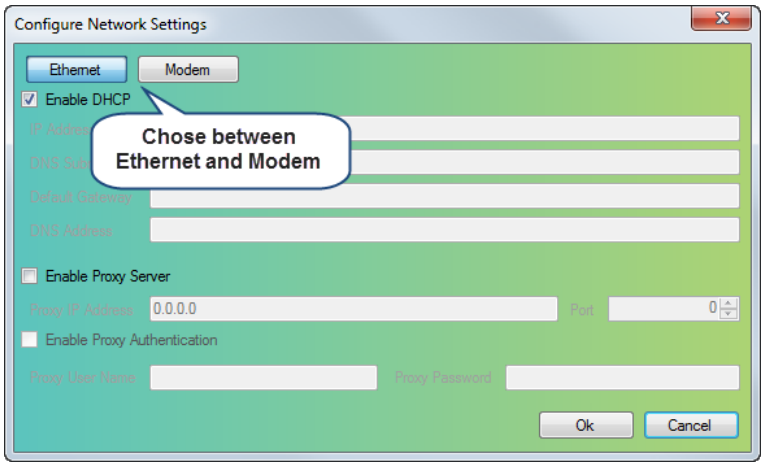
The number of performed franking imprints is displayed.
Reset the counter to zero with [Yes].

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.

Navigator opens the 'Configure Network Settings' Wizard. Set all further parameters according to your system environment.

If you are using the PostBase mailing system, you have to choose between [Ethernet] and [Modem] first.

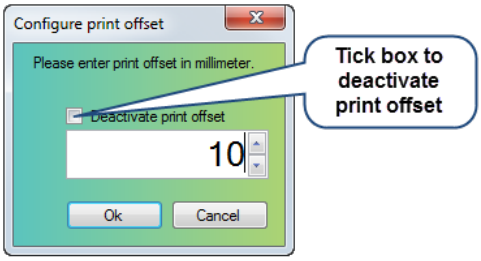


13.8 Imprint Offset *(not PostBase Mini, not in all countries)*

PostBase prints the franking 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 franking imprint to the left by adjusting the imprint offset.

Select [Imprint Offset] in the PostBase Menu.

Navigator opens the window for setting the imprint offset.



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

Note: The offset you enter here is also effective for the special functions 'Print Advert Only' and 'Print Numbers'.

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 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.

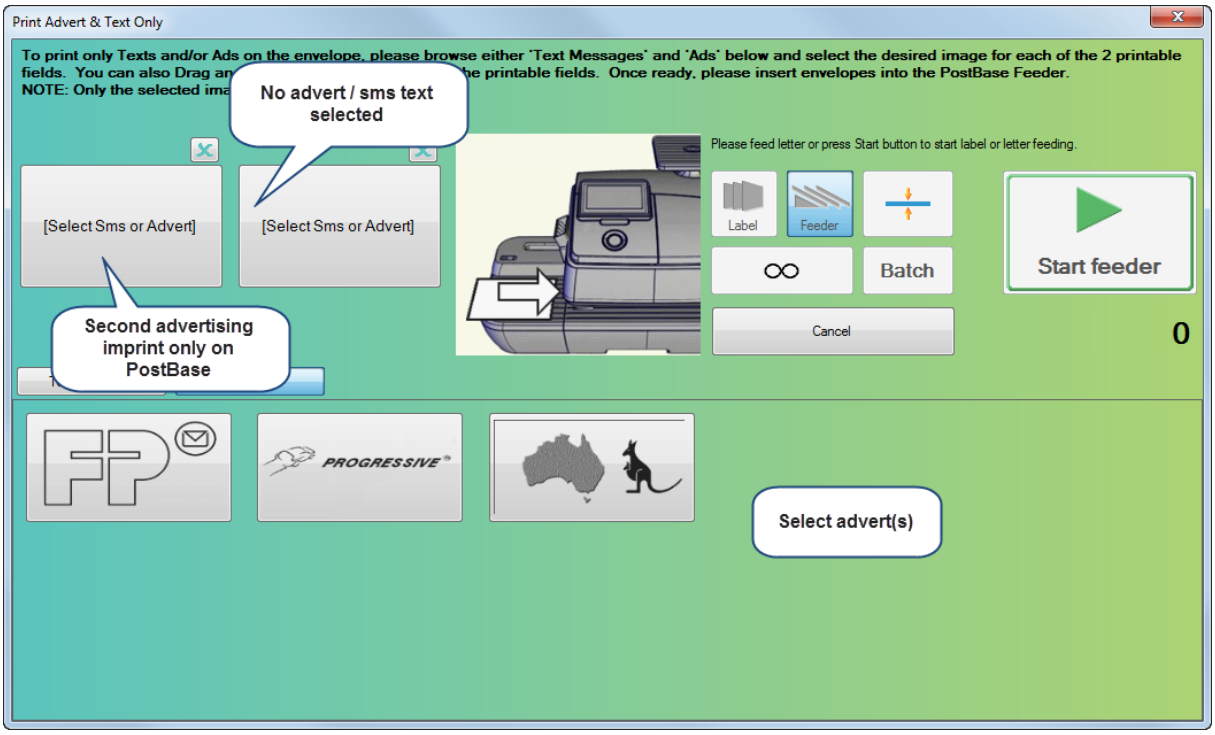
Note: When connected with PostBase NavigatorBasic / NavigatorPlus, PostBase will neither turn itself off, nor enter standby mode.

13.11 Print Advert / Text Message Only

With the 'Print Advert Only' function, you can print adverts and text messages *(not in all countries)*.

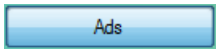
Click on [Print Advert Only] in the PostBase Menu.

Navigator opens the 'Print Advert & Text Only' window. The two selection fields on the upper left show the print image for this special function. You can assign each one of these fields either an advert or a text message.



Set an advert / a text message for printing

or



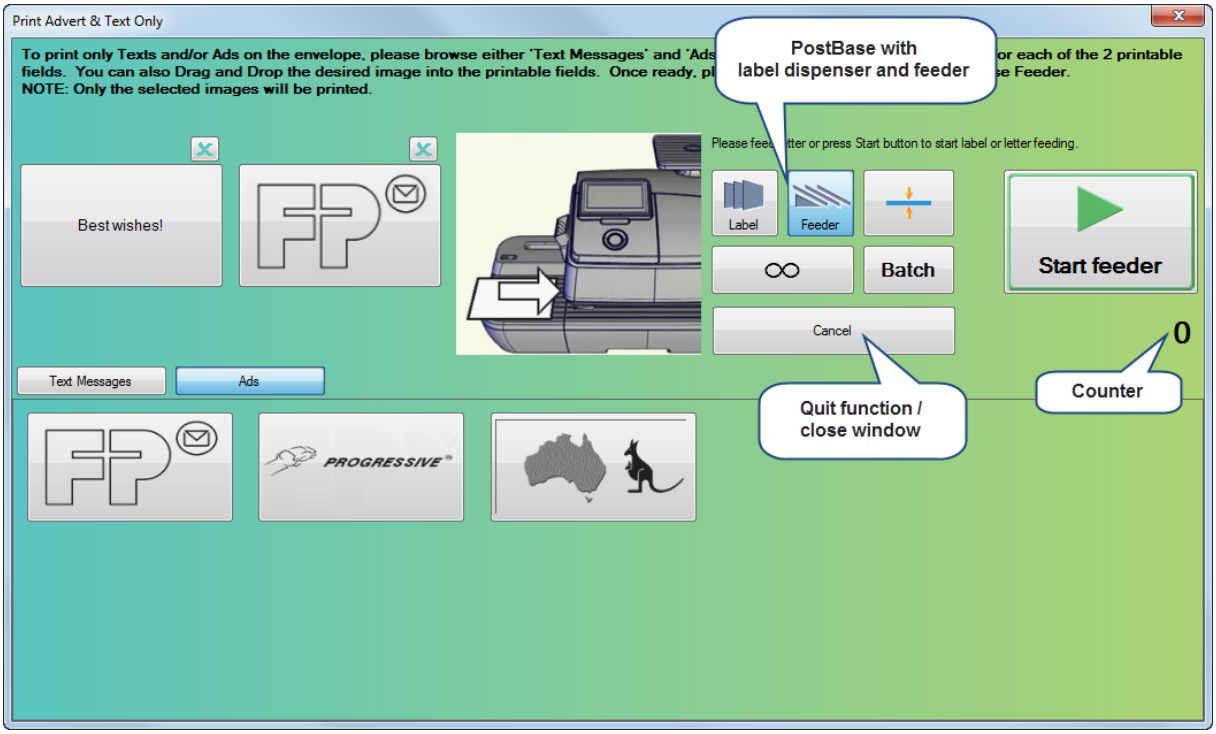
In the lower section of the 'Print Advert & Text Only' window, select the kind of imprint you want to set: [Text Messages] or [Ads].
Navigator then displays all available adverts or text messages accordingly.

There are two ways to set the imprint:

– Click on the selection field in which the text message or advert should appear. Then, in the lower section of the window, click on the desired text message / advert.
– Simply ‘Drag and Drop’ the desired text message /advert into the desired selection field with the mouse.

When the desired setting is shown, you can start printing.

Start printing



When the desired imprints are set in the ‘Print Advert & Text Only’ window, you can start printing. Proceed exactly as when franking mail:

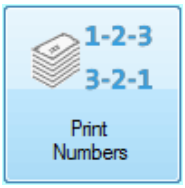
– Manually position a mail piece on the PostBase or
– Start label printing or
– Use the automatic feeder.

If you need help, please read the chapter Franking.

The ‘Print Advert Only’ special function has its own counter. Navigator shows the number of imprints on the right side of the window. When quitting the ‘Print Advert & Text Only’ window, the counter is reset to ‘0’.

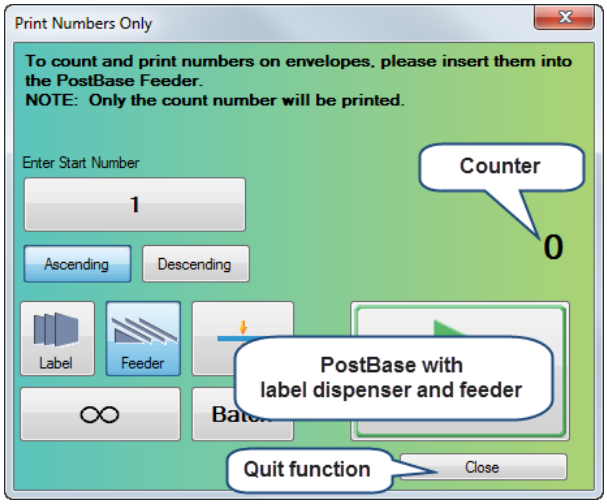
13.12 Print Numbers

With the ‘Print Numbers’ function, you can print a 6-digit consecutive number vertically on your mail.

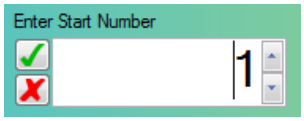


Click on [Print Numbers] in the PostBase Menu.

Navigator opens the ‘Print Numbers Only’ window. Here, you can define the settings for the ‘Print Numbers’ special function and start printing:



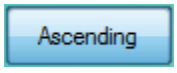
Define the start number and the direction of counting



Click on the button for the start number.

Enter the desired start number in the input field. You can choose any number between 1 and 999999.

Confirm your input.



Define the direction of counting: [Ascending] or [Descending].

Start printing

When the‘Print Numbers Only’ window shows the desired settings, you can start printing. Proceed exactly as when franking mail:

- Manually position a mail piece on the PostBase or
- Start label printing or
- Use the automatic feeder.

If you need help, please read the chapter Franking.

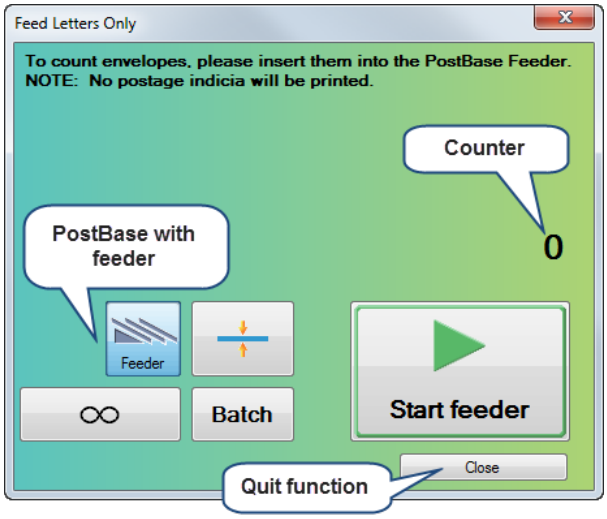
The ‘Print Numbers’ special function has its own counter. Navigator shows the number of imprints on the right side of the window. When quitting the ‘Print Numbers Only’ window, the counter is reset to ‘0’.

13.13 Feed Only / Count mail pieces *(not PostBase Mini)*

With the 'Feed Only' function, you can process mail without printing. In this way, you can count mail pieces and prepare your bulk mail for dispatch in counted stacks.

Click on [Feed Only] in the PostBase Menu.

Navigator opens the 'Feed Letters Only' window.



Start the letter transport.
When stack processing with the automatic feeder for the 'Feed Only' special function, proceed exactly as when franking mail. If you need help, please read the chapter Franking.

> *Note: The 'Feed Only' special function is also available when working without automatic feeder. You then have to position mail pieces individually on the hand feed tray.*

Navigator shows the number of transported mail pieces on the right side of the window.
When quitting the 'Feed Letters Only' window, the counter is reset to '0'.

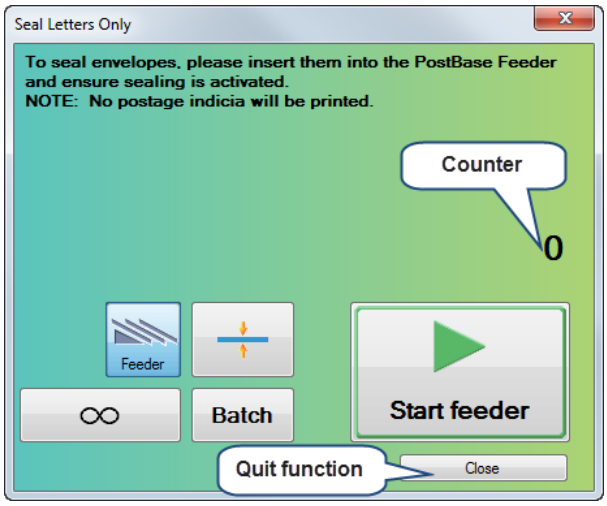
13.14 Seal Only *(not PostBase Mini)*

With the 'Seal Only' function, you can seal and count letters without printing.

Click on [Seal Only] in the PostBase Menu.

Note: The 'Seal Only' special function is only available for PostBase franking systems with automatic feeder.

Navigator opens the 'Seal Letters Only' window.



Switch on the seal function on the automatic feeder.

Note: For detailed information on the sealing function of the automatic feeder, please refer to the PostBase User Manual (Reference Guide). Please heed the envelope specifications for automatic sealing.

Start the letter transport.
When stack processing with the automatic feeder for the 'Seal Only' special function, proceed exactly as when franking mail. If you need help, please read the chapter Franking.

The 'Seal Only' special function has its own counter. Navigator shows the number of processed letters on the right side of the window. When quitting the 'Seal Letters Only' window, the counter is reset to '0'.

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 Home screen (see chapter Start / exit the program).
- The USB cable must be properly connected.

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

Rectification:
- Turn off PostBase and close the program. Turn the franking machine on again. As soon as PostBase shows the Home screen, open NavigatorBasic / NavigatorPlus and click [Connect].

Postage download *(if applicable to your country)*

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.

Connection establishment

Problem Area: The software cannot establish a connection to the data centre / server.

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.

Franking

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

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

Print Advert Only

Problem Area: Printing will not start.

Rectification:
- No advert / no text message has been set. Set at least one advert / one text message (see chapter Print Advert / Text Message Only).

Problem Area: The adverts / text messages are not printed on the expected position on the letter.

Rectification:
- Imprint offset is active. Deactivate the imprint offset or set a suitable value (see chapter Imprint Offset).

Print Numbers

Problem Area: The number is not printed on the expected position on the letter.

Rectification:
- Imprint offset is active. Deactivate the imprint offset or set a suitable value (see chapter Imprint Offset).

Seal Only

Problem Area: The envelopes are transported, but not sealed.

Rectification:
- On the automatic feeder, check if the sealing function is switched on. Refer to the PostBase User Manual (Reference Guide).

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 NavigatorPlus.
- Some functions are not available on a PostBase Mini.

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).

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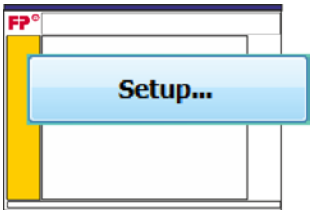
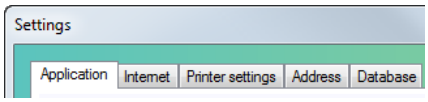
15 Appendix: Software settings

15.1 Settings overview



Click on [Setup..] in the main menu. Navigator opens the ‘Settings’ dialog box.

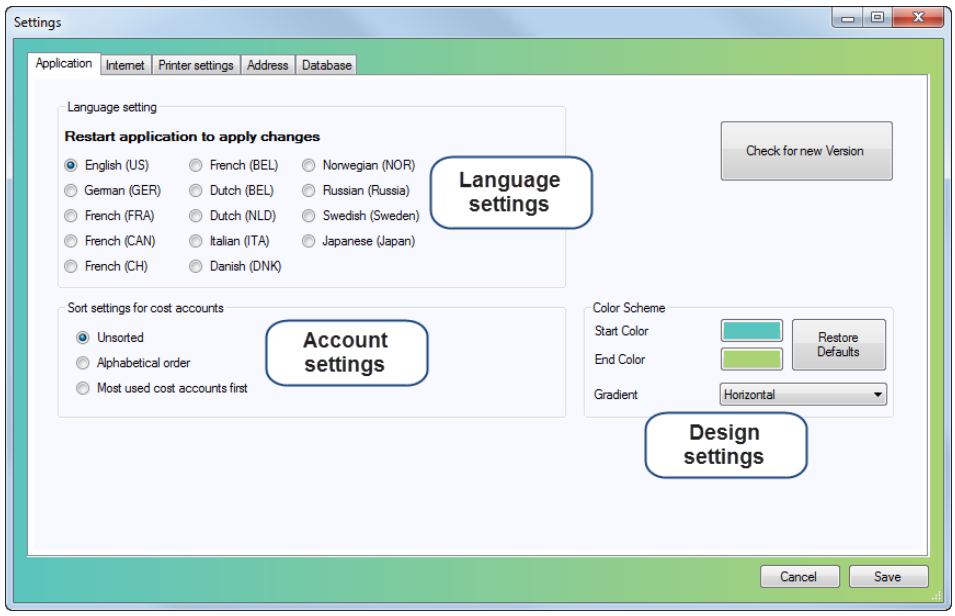
Select the corresponding tab to make Application settings, Imprint settings etc.



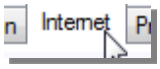
15.2 Application

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.

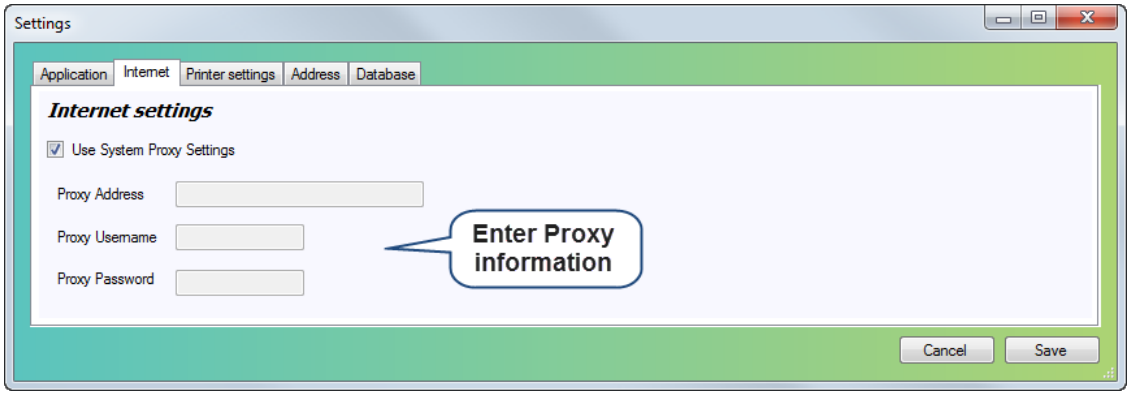


15.3 Internet

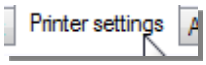


Click on the tab ‘Internet’.

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

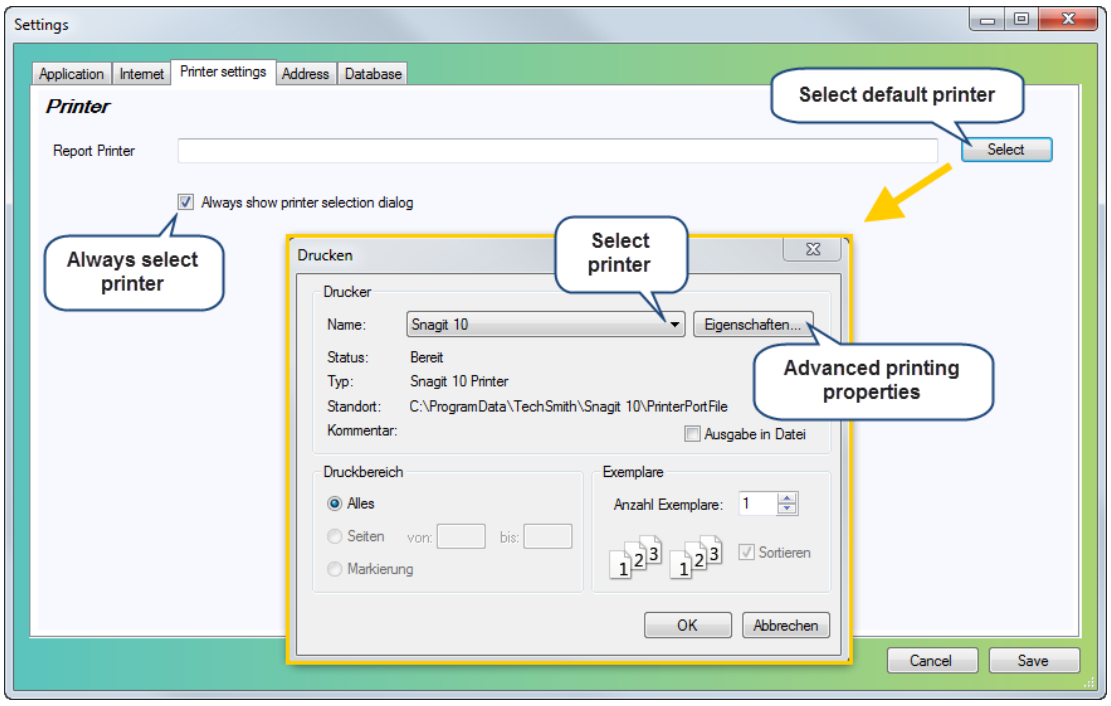


15.4 Printer



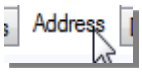
Click on the tab ‘Printer settings’.

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



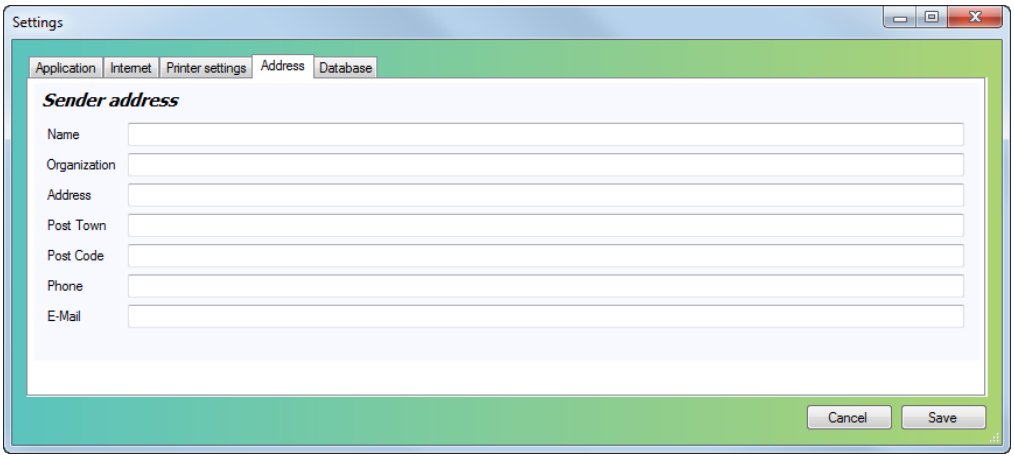
Note: If you tick the box ‘Always show printer selection dialog’, the software asks you to select a printer whenever you print a report.

15.5 Address



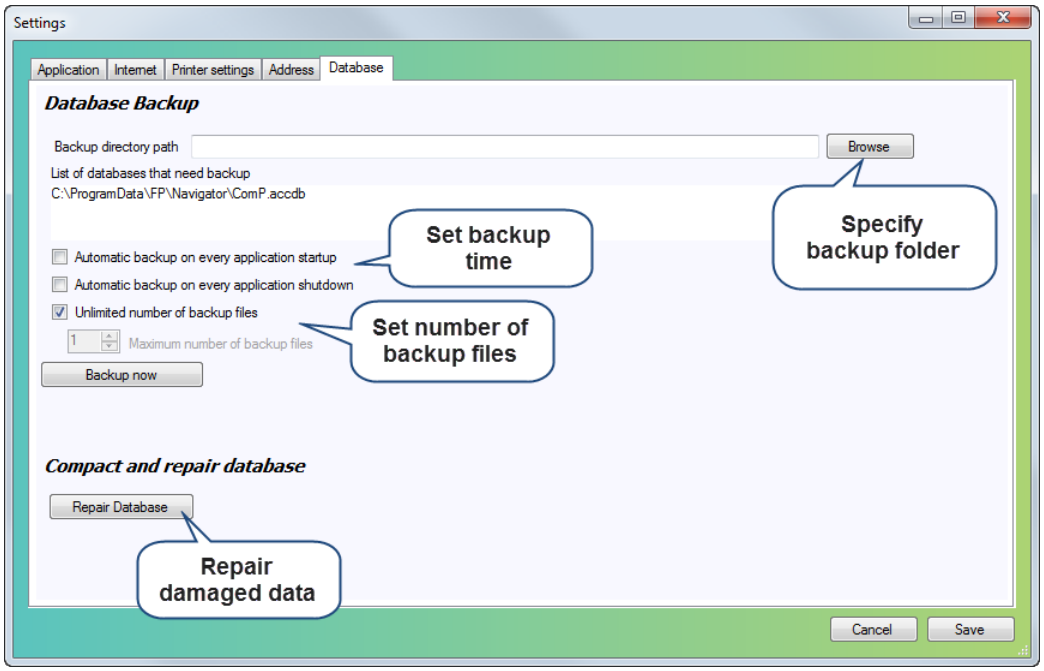
Click on the ‘Address’ tab.

Enter your address.



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.