**UNITED STATES**
**POSTAL SERVICE.**

# POS ONE - NCR

# Sales and Services
# Quick Reference
# Guide

**March 2000**

*Retail, Consumers and Small Business*
Retail Workforce Strategies

# USE OF TRAINING MATERIALS

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Send all comments and suggestions to the address listed below and they will be reviewed and considered for the next update.

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# SECTION 1: HELP

| 1 | HELP DESK PHONE NUMBER |
|---|---|

I-800-877-7435

1-800-USPS-HELP

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# SECTION 2: START OF DAY AND SIGN IN/OUT

## 1 START OF CLERK'S DAY

**TIP:** **If you receive two (2) logon failures, STOP and notify your supervisor.**

1. **<Start of Clerk's Day>**

2. Key your Logon Name.

3. **Tab**

4. Key your password.

5. **Enter**

6. **<Window Clerk>**

7. **<Print Opening Balance>**

8. Close the cash drawer.

9. **[Mailing Services]**

## 2 SIGNING IN

1. **<Clerk Sign In>**

2. Key your Logon Name.

3. **Tab**

4. Key your password.

5. **Enter**

6. **<Window Clerk>**

7. Close the cash drawer.

8. **[Mailing Services]**

# 3 SIGNING OUT

**TIP:** **Use this procedure when removing the till from the cash drawer.**

1. **[Clerk Services/Back Office]**

2. **<Administrative Functions>>>>>**

3. **<Sign Out>**

4. Remove the cash till.

5. Close the cash drawer.

6. **<Accept>**

# 4 STANDBY

**TIP:** **Use this procedure to lock your terminal when you are leaving the till in the cash drawer while you are temporarily away from the window.**

1. **[Mailing]**

2. **<Standby>**

   OR

1. **[Clerk Services/Back Office]**

2. **<Standby>**

# 5   MANDATORY CASH DRAWER USE

For maximum security and protection of funds. the use of the POS ONE cash drawer is mandatory. The cash drawer opens automatically during a cash sale. which ensures that all funds are collected for each transaction.

SIGN-OUT requires the removal of the cash drawer. This frees up the workstation, allowing another employee access during peak hours.

STANDBY acts as a temporary lock for customer services that require absences from the terminal.

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# SECTION 3: MAILING

## 1 DOMESTIC MAIL

**For Domestic mailings, begin with these four steps:**

1. **[Mailing]**

2. Place the article on the zero scale.

3. Key the ZIP code.

4. **Enter**

## 1.1 PROVIDING PRIMARY SERVICES

### A. First Class Mail

**TIP:** **For oversized articles, you must press <Surcharges> after you enter the ZIP Code.**

1. Complete steps 1–4 for Domestic Mail (page 3-l).

2. Select the type of article being mailed.

3. **<First-Class>**

4. Process any special services requested.

   OR

   **<Continue To Finish>**

5. Issue postage.

### B. Priority Mail

1. Complete steps 1–4 for Domestic Mail (page 3-l).

2. **<Priority Mail>**

3. Process any special services requested.

   OR

   **<Continue To Finish>**

4. Issue postage.

## C. Certified Mail with Return Receipt

1. Complete steps I-4 for Domestic Mail (page 3- I ).

2. **<Certified Mail w/ Return Receipt>**

3. Issue postage.

## D. Non-Standard Mail

### First Class Letter (under 1 oz.)

1. Complete steps 1–4 for Domestic Mail (page 3-I).

2. **<Surcharges>**

3. **<Letter/Correspondence>**

4. **<1 oz. Non-standard>**

5. **<Accept>**

6. **<First Class>**

7. Process special services. if any.

   OR

   **<Continue to Finish>**

8. Issue postage.

### Priority Mail/Parcel Post

1. Complete steps l-4 for Domestic Mail (page 3-l).

2. **<Surcharges>**

3. **<Package/Merchandise>**

   OR

   **<Priority Mail>**

4. Select the applicable surcharges.

5. **<Accept>**

6.  Select the mail class.

7.  Process any special services requested.

    OR

    **<Continue to Finish>**

8. Issue postage.

## E. Express Mail

1.  Complete steps 1–4 for Domestic Mail (page 3-l ).

2.  **<Express Mail>**

3.  **<Express Mail PO-ADD>**

    OR

    **<Express Mail PO-ADD Flat Rate>**

4.  Select the delivery option.

5.  Select the destination type.

6.  Process any special services requested.

    OR

    **<Continue To Finish>**

7.  Scan the Express Mail label.

8.  Issue postage.

## Pay By Account

If Paying by Account:

1.  **<Pay by Account>**

2.  If a Corporate Account:

    Key the customer account number.

    **Enter**

    **<Accept>**

    OR

    If a Federal Agency Account:

Press the **Up Arrow** key (edit).

**<Federal Agency Account>**

Key the control number.

**Enter**

Key the sub-control number.

**Enter**

3 . **<Accept>**

## F. Standard Mail/Parcel Post

1. Complete steps 1–4 for Domestic Mail (page 3-l).

2. **<Package/Merchandise>**

3. **<Parcel Post>**

4. Process any special services requested.

    OR

    **<Continue To Finish>**

5. Issue postage.

## G. Printed Material

**TIP: Use this procedure for books, bound printed matter, library, and matter for the blind.**

1. Complete steps 1–4 for Domestic Mail (page 3-l).

2. **<Package/Merchandise>**

3. **<Printed Material (e.g.: books.. .)>>>>**

4. Select the printed material service.

5. Process any special services requested.

    OR

    **<Continue To Finish>**

6. Issue postage.

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## 1.2    ADDING SPECIAL SERVICES

1.  Complete steps 1–4 for Domestic Mail (page 3-l).

2.  Process the primary service
    (Letter/Correspondence,    Package/Merchandise,
    etc.).

3.  Process any special services. if requested.

4.  **<Continue To Finish>**

    OR

    **<Continue Secondary Services>**

    **<Continue To Services Info>**

5.  Key the information required for each service
    selected.

6.  **Enter**

7.  **<Accept>**

8.  Process any additional services, if requested.

9.  **<Continue>**

10. Issue postage.

11. Print the postal form, if necessary.

## 1.3    ISSUING POSTAGE

**TIP:   You MUST be at the Postage screen.**

1.  Complete the mailing process to the point where
    the system prompt reads, "What kind of postage?"

2.  Select the type of postage to be issued.

> On this screen. you also can:
> - Add/change services
> - Change the ZIP Code. Mail Class, or Surcharges
> - Issue a Certificate of Mailing
> - Press **<No Postage Required>** when a customer is making a rate inquiry

## 1.4 PRINTING A ZERO PVI

1. Complete the mailing process to the point where the system prompt reads. "What kind of postage?"

2. **<Postage Affixed>**

3. Key amount of customer postage.

4. **Enter**

5. **<Print PVI Label>**

## 1.5 EXPRESS MAIL COLLECTION MODE

1. **[Other Customer Services]**

2. **<Other Transactions>>>>**

3. **<Express Mail Collection Mode>**

4. Key the correct date, if necessary.

5. **Enter**

6. Key the correct time, if necessary.

7. **Enter**

8. **<Accept>**

9. Key the ZIP code.

10. **Enter**

11. Scan or enter label information.

12. Enter Express Mail Service.

13. Select Express Mail delivery option.

14. Select a destination type.

15. Process any special services requested.

    OR

    **<Continue To Finish>**

16. Follow the prompts to issue postage.

17. **<Exit Collection Mode>**

# 2   INTERNATIONAL   MAIL

**For International mailings, begin with these five steps:**

1. **[Mailing]**

2. Place the article on the scale.

3. **<International   Mail>**

4. Identify   the   country/destination.

   Key the first several letters in the country name.

   Continue to type the country name until the correction destination is highlighted.

5. **Enter**

# 2.1   LETTER/LETTER PACKAGE -- AIR

1. Complete steps l-5 for International Mail (page 3-7).

2. **<Letter/Correspondence>**

3. **<Letter/Letter Package -- Air>**

4. **[Help]**

5. Check for customs information.

6. **<Exit Help>**

7. **<Continue>**

8. Process any special services requested.

   OR

   **<Continue To Finish>**

9. Issue postage.

## 2.2 SMALL PACKET – AIR/SURFACE

1. Complete steps 1–5 For International Mail
   (page 3-7).

2. **[Help]**

3. Check for Area and Content Restrictions.

4. **<Exit Help>**

5. **<Package/Merchandise>**

6. **<None>**

   OR

   **<Registered Mail>** or **<Insured Mail>,** if
   requested by the customer.

7. **[Help]**

8. Check for size and weight.

9. **<Exit Help>**

10. **<Small Packet – Air>**

    OR

    **<Small Packet – Surface>**

11. **[Help]**

12. Check for customs forms.

13. **<Exit Help>**

14. **<Continue>**

15. **<Continue  To  Finish>**

    OR

    Process any special services requested.

    **<Continue To Services Info>**

    Enter requested information for special services.

    **Enter**

    **<Accept>**

16. Issue   postage.

---

## 2.3    PARCEL POST — AIR/SURFACE

1.  Complete steps 1-5 for International Mail (page 3-7).

2.  **[Help]**

3.  Check for Area and Content Restrictions.

4.  **<Exit  Help>**

5.  **<Package/Merchandise>**

6.  **[Help]**

7.  Check for size and weight restrictions.

8.  **<Exit  Help>**

9.  **<Parcel Post — Air>**

    OR

    **<Parcel Post — Surface>**

10.  **[Help]**

11.  Check for customs information.

12.  **<Exit  Help>**

13.  **<Continue>**

**14.** **&lt;Continue To Finish&gt;**

OR

Select additional special services if needed.

**&lt;Continue To Services Info&gt;**

Key the requested information for special services.

**Enter**

**&lt;Accept&gt;**

**15.** Issue postage.

## 2.4 GLOBAL PRIORITY MAIL

1. Complete steps 1-5 for International Mail (page 3-7).

2. **[Help]**

3. Check for Area and Content Restrictions.

4. **<Exit Help>**

5. Scan/enter the bar code.

6. **[Help]**

7. Check for required customs forms.

8. **<Exit Help>**

9. **<Continue>**

10. Issue postage.

OR

1. Complete steps l-5 for International Mail (page 3-7).

2. **[Help]**

3. Check for Area and Content Restrictions.

4. **<Exit Help>**

5. **<Global Priority Mail>**

6. **[Help]**

7. Check for size and weight restrictions.

8. **<Exit Help>**

9. Select the appropriate Global Priority Mail class.

10. **[Help]**

11. Check for required customs forms.

12. **<Exit Help>**

13. **<Continue>**

14. **Scan the Global Priority Mail label.**

15. Issue postage.

---

## 2.5    INTERNATIONAL EXPRESS MAIL

1. Complete steps 1–5 for International Mail
   (page 3-7).

2. **[Help]**

3. Check for Area and Content Restrictions.

4. **<Exit Help>**

5. **<International  Express  Mail>**

6. **[Help]**

7. Check for customs information.

8. **<Exit  Help>**

9. **<Continue>**

10. **<Continue  To  Finish>**

    O R

    Process any special services requested.

    > Select special services requested by the
    > customer.

    > **<Continue  To  Services  Info>**

    > Key the requested information for the
    > special services.

    > **Enter**

    > **<Accept>**

11. **Scan the Express Mail label.**

12. **Issue postage.**

## A. Pay By Account

Paying by Account:

1. **\<Pay by Account\>**

2. If a Corporate Account:

 Key the customer account number

 **Enter**

 **\<Accept\>**

OR

If a Federal Agency Account:

 Press the **Up Arrow** key (edit).

 **\<Federal Agency Account\>**

 Key the control number.

 **Enter**

 Key the sub-control number.

 **Enter**

3. **\<Accept\>**

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# SECTION 4: SELLING STAMPS AND MERCHANDISE

## 1 NO SALE

1. **[Clerk Services/Back Office]**

2. **<No Sale>**

3. **<OK>**

## 2 SELLING STAMPS FROM THE MAILING SCREEN

### 2 . 1 SELLING A SINGLE STAMP

1. **[Mailing]**

2. Key the stamp denomination.

3. **<Single Stamp Sale>**

### 2 . 2 SELLING MULTIPLE STAMPS

1. **[Mailing]**

2. **<Single Stamp Sale>**

3. Use the arrow keys to scroll down the list.

4. Highlight the item you want to sell.

5. Key the quantity.

6. **[Quantity]**

7. **<Accept>**

## 3    SELLING STAMPS FROM THE STAMPS & MERCHANDISE SCREEN

1.    **[Stamps & Merchandise]**

2.    Key the stamp denomination.

3.    **<Loose Stamps>**

OR

1.    **[Stamps & Merchandise]**

2.    Key the quantity.

3.    **[Quantity]**

4.    Key the stamp denomination.

5.    **<Loose Stamps>**

## 3.1    EDITING THE QUANTITY

1.    **[Up Arrow]** to highlight the item you want to edit.

2.    Key the correct quantity.

3. **<Change Quantity>**

4.    **<Exit Edit Mode>**

# 4    SELLING BARCODED PRODUCTS

**1. [Mailing]**

2. Scan the item.

O R

**1. [Stamps & Merchandise]**

If you are selling more than one:

Key the quantity.

**- [Quantity]**

**2.** Scan the item.

## 4.1    KEYING A BARCODED PRODUCT

**1. [Mailing]**

OR

**[Stamps & Merchandise]**

2. Key the barcoded number.

**3. Enter**

# 5    SELLING NON BARCODED PRODUCTS

## 5.1    KEYING A PRODUCT ITEM NUMBER

**1. [Mailing]**

2. Key the product item number.

**3. <Sell by Item Number>**

OR

For more than one of the same item:

1. **[Stamps & Merchandise]**

2. Key the quantity.

3. **[Quantity]**

4. Key the product item number.

5. **<Sell by Item Number>**

## 5.2 USING LOOKUP INFORMATION

1. **[Stamps & Merchandise]**

2. **[Lookup Information]**

3. **<Item Lookup>**

4. Key the item information.

5. Select the type of item information you entered (item number, price, or description).

## 6 SELLING A RETAIL PRODUCT WITHOUT A BARCODE OR ITEM NUMBER

1. **[Other Customer Services]**

2. **<Other Transactions>>>>**

3. **<Miscellaneous Purchases>**

4. Key the AIC:

   099     Phone Cards

   098     Packaging

5. **Enter**

6. Key amount.

7. **Enter**

8. **<Accept>**

# 7 PRINTING PVI LABELS FROM THE STAMPS & MERCHANDISE SCREEN

**TIP: Prior to payment, you can void a PVI label and the 553 is adjusted automatically. To void a PVI:**

- **[Up Arrow]** to highlight the PVI
- **<Void Item (or Refund Item)>**
- **<Continue>**
- **<Exit Edit Mode>**

1. **[Stamps & Merchandise]**

2. Key the quantity (if more than one).

3. **[Quantity]**

4. Key the PVI label amount.

5. **<Print PVI>**

# 8 ISSUING CERTIFICATES OF MAILING

## 8.1 ISSUING A SINGLE CERTIFICATE

1. **[Stamps & Merchandise]**

2. **<Certificate of Mailing>**

3. Affix the PVI label.

## 8.2 ISSUING MULTIPLE CERTIFICATES

1. **[Stamps & Merchandise]**

2. Key the quantity.

3. **[Quantity]**

4. **<Certificate of Mailing>**

5. If the quantity is three or more. select the type of certificate of mailing.

6. Affix the PVI label.

# 9 EXCHANGING MERCHANDISE

**TIP: The value of the replacement products MUST equal or exceed the value of the items being returned.**

For merchandise exchanges, begin with these two steps:

1. **[Stamps & Merchandise]**

2. **<Exchange>**

## 9.1 EXCHANGING SALEABLE STOCK BY ITEM NUMBER

3. Complete steps 1-2 for Exchanging Merchandise (page 4-6).

4. Scan the item number of the returned item.

5. Scan the item number for the new item.

OR

2. Key the item number for the returned item.

3. **<Exchange by Item Number>**

4. Key the item number for the new item.

5. **<Sell by Item #>**

## 9.2 EXCHANGING NON-SALEABLE (REDEEMED) STOCK

1. Complete steps l-2 for Exchanging Merchandise (page 4-6).

2. Key the amount.

**3. \<Redeemed  Stamp  Stock\>**

4.   Key or scan the item number for the new item.

OR

Press the DynaKey that corresponds to the type of item being purchased (Loose Stamps, PVI. Discounted   Envelopes).

O R

Enter  the  item  number.

**\<Select  by  Item  Number\>**

## 9.3    EXCHANGING  **USPS IRC**

1.   Complete steps l-2 for Exchanging Merchandise (page  4-6).

2.   Key  the  amount.

**3. \<Exchange  USPS  IRC\>**

4.   Key or scan the item number for the new item.

O R

Press the DynaKey that corresponds to the type of item being purchased (Loose Stamps, PVI, Discounted   Envelopes).

O R

Enter  the  item  number.

**\<Select  by  Item  Number\>**

## 9.4    EXCHANGING  FOREIGN  **IRC**

1.   Complete steps l-2 for Exchanging Merchandise (page  4-6).

2.  Key  the  amount.

**3. \<Exchange  Foreign  IRC\>**

4. Key or scan the item number for the new item.

   O R

   Press the DynaKey that corresponds to the type of item being purchased (loose stamps, PVI. discounted    envelopes).

   O R

   Key the item number.

   **<Select by Item Number>**

## 9.5  EXCHANGING DISCOUNTED ENVELOPES

1. Complete steps 1-2 for Exchanging Merchandise (page 4-6).

2. **<Discounted Envelopes>**

3. Use the scroll keys to highlight the item being exchanged.

4. **<Accept>**

5. Select a new item:

   **<Loose Stamps>**

   OR

   **<Discounted Envelopes>**

       Use the scroll keys to highlight the replacement   item.

       **<Accept>**

   OR

       Key the quantity.

   • **[Quantity]**

       Key the item number.

       **<Sell by Item #>**

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# SECTION 5: PROVIDING OTHER CUSTOMER SERVICES

## 1 MONEY ORDERS

### 1.1 SELLING MONEY ORDERS

### A. Selling a Domestic Money Order with Fee

1. [Mailing]

2. <Sell Domestic Money Order w/Fee>

3. Key the money order amount.

4. Enter

### B. Selling a Domestic or International Money Order

1. [Other Customer Services]

2. <Money Orders>>>>

3. <Sell Domestic Money Order w/Fee>

   OR

   <Sell International Money Order>

4. If foreign money order, identify the country.

5. Key the money order amount.

6. Enter

## 1.2    ISSUING A NO FEE MONEY ORDER

1. **[Other Customer Services]**

2. **<Money Orders>>>>**

3. **<Issue No Fee Money Order>**

4. Key the Money Order amount.

5. **[Enter]**

6. If it is a unit related expense:

   **<Yes>**

   Key the AIC/GLA information.

   **<Accept>**

   If it is not a unit related expense:

   <No>

7. **[Payment or End of Visit]**

## 1.3    PRINTING A MONEY ORDER

1. Place the money order on the slip table, face up.

2. Slide the money order to right until it is against the guide.

3. Slide the money order toward the back of the printer until the green light appears.

4. Follow the prompts.

5. Remove the money order after processing.

6. **<Continue>**

## 1.4    PRINTING A MONEY ORDER IF MICR CANNOT READ

1 . **<Cancel>**

2.   Key the serial number.

**3.   [Enter]**

4.   Try to read the money order again by re-inserting it into the slip printer.

**5 .   &lt;Cancel&gt;**

**6.   &lt;Accept&gt;**

7.   The money order prints.

---

## 1.5   CASHING MONEY ORDERS – DOMESTIC OR FOREIGN

**1. [Other  Customer  Services]**

**2. &lt;Money  Orders&gt;&gt;&gt;&gt;**

**3.   &lt;Cash Domestic Money Order&gt;**

   or

   **&lt;Cash Foreign Money Order&gt;**

   Identify  the  country.

**4.**   Key the money order amount.

**5.   [Enter]**

6.   Scan the money order (domestic only).

   **&lt;Accept&gt;**

OR

6.   Manually key the serial number.

   **[Enter]**

   **&lt;Accept&gt;**

**7.   [Payment or End of Visit]**

8.   Key the amount, then select payment method.

9 .   Endorse the money order.

## 1.6   ENDORSING A MONEY ORDER

1. Place the money order form on the slip table, face down.

2. Slide the money order to the right until it is against the guide.

3. Slide the money order toward the back of the printer until the green light appears.

4. Remove the money order after processing.

## 1.7   VOIDING A MONEY ORDER BEFORE PAYMENT IS ACCEPTED

1. **[Up Arrow]**

2. Highlight the money order you want to void.

3. **<Void Item (or Refund Item)>**

   or

   **<Void All Items>**

4. **<Exit Edit Mode>**

5. Follow the screen prompts to complete the cancellation.

## 1.8   VOIDING PRINTED MONEY ORDERS/CHANGING FEE STATUS

1. **[Other Customer Services]**

2. **<Money Orders>>>>**

3. **<Void Money Order/Change Fee Status>**

4. Insert Money Order into printer to scan.

   or

   Key the money order serial number.

   - **[Enter]**

5. **<Void Money Order>**

   or

   **<Remove Fee>**

6. Follow the screen prompts.

7. **[Payment or End of Visit]**

## 1.9 REFUNDING A NON-PRINTED MONEY ORDER

1. **[Other Customer Services]**

2. **<Money Orders>>>>**

3. **<Refund Non Printed Money Order>**

4. Use the scroll keys to highlight the money order on the list.

5. **<Accept>**

6. **<Refund Money Order>**

7. **[Payment or End of Visit]**

8. Key the refund amount.

9. Select a tender method.

## 2  CUSTOMER ADVANCE DEPOSIT TRUST ACCOUNTS

1. **[Other Customer Services]**

2. **<Customer Advance Deposit Trust Accounts>**

## 2.1 CREATING A PERMIT IMPRINT/BULK MAIL ACCOUNT

1. Complete steps I-2 for Customer Advance Deposit Trust Accounts (page 5-5).

2. **<Create Account>**

3. **<Permit Imprint/Bulk Mail (All Types)>>>>**

4. **<Permit Imprint>**

5. Key the appropriate information in each field. Press **[Enter]** after each entry. (Write down the customer's account number.)

6. **<Accept>**

7. **<Pay Fee>**

8. **<Permit Imprint/Bulk Mail (ail types)>=>**

9. **<Bulk Mail Annual Permit>**

10. Key the Permit/Account number.

11. **Enter**

12. Key the appropriate information in each field. Press **Enter** after each entry.

13. **<Accept>**

14. **<Accept>**

## 2.2 DEPOSITING FUNDS INTO A TRUST ACCOUNT

1. Complete steps 1-2 for Customer Advance Deposit Trust Accounts (page 5-5).

2. **<Deposits>**

3. Select the account type.

4. Key the account number.

5. Key the appropriate information in each field. Press **Enter** after each entry.

6. Key the amount of deposit.

7. **<Accept>**

## 2.3 WITHDRAWING **FUNDS** FROM A TRUST **ACCOUNT**

1. Complete steps 1-2 for Customer Advance Deposit Trust Accounts (page 5-5).

2. **<Withdraw>**

3. Select the account type.

4. Key the account number.

5. **[Enter]**

6. Key the appropriate information in each field. Press **Enter** after each entry.

7. Key the withdrawal amount.

8. **[Enter]**

9. **<Accept>**

## **2.4** ENTERING THE OFFSET **AIC/GLA** FOR PERMIT **IMPRINT**

1. **[Other Customer Services]**

2. **<Other Transactions>>>>**

3. **<Miscellaneous Purchases>**

4. Key the appropriate AIC/GLA.

5. **[Enter]**

6. Key the withdrawal amount.

7. **[Enter]**

8. **<Accept>**

9. **[Payment or End of Visit]**

## **2.5** REFUNDING TRUST ACCOUNT FUNDS

1. **[Other Customer Services]**

2. **<Customer Advance Deposit Trust Accounts>**

3. **<Refund>**

4. Select the account type.

5. Key the account number, if known.

6. Key the appropriate information in each field. Press **[Enter]** after each entry.

7. Key the refund amount.

8. **[Enter]**

9. **<Accept>**

10. Select the refund method.

11. **<Accept>**

## 2.6 PAYING ANNUAL AND/OR ACCOUNTING FEES

1. **[Other Customer Services]**

2. **<Customer Advance Deposit Trust Accounts>**

3. **<Pay Fee>**

4. Select the account type.

5. Key the account number.

6. **[Enter]**

7. Key the customer name.

8. **[Enter]**

9. **<Accept>**

10. Select **<Annual Fee>** or **<Accounting Fee>.**

11. **<Accept>**

## 3 P. 0. BOX & CALLER SERVICES

**TIP: You MUST enter information in both the first name and last name fields for the correct information to appear on the reports. (If it is a company name, enter three periods (. . .) for the first name.)**

## 3.1 INITIATING A **P. 0. Box** RENTAL

1. **[Other Customer Services]**

2. **<P. 0. Box/Caller Services>>>>**

3. **<Initiate Rental>**

4. **<Box Size>**

5. **[Enter]**

6. Key the P. 0. Box number.

7. **[Enter]**

8.  Key the appropriate information in each field.

9.  **[Enter]** after each entry.

10. Select the correct rental period.

11. **<Accept>**

---

## 3.2    RENEWING A **P. 0. Box** RENTAL

1.  **[Other Customer Services]**

1.  **<P. 0. Box/Caller Services>>>>**

3.  **<Renew Rental>**

4.  Select the box size.

5.  **[Enter]**

6.  Key the P. 0. Box number.

7.  **[Enter]**

8.  Key the appropriate information in each field. Press **[Enter]** after each entry.

9.  Select the new rental period.

10. **[Enter]**

11. Key the start date.

12. **[Enter]**

13. Scroll to **Number of Additional Keys.**

14. Select number of keys.

15. **<Accept>**

---

## 3.3    RESERVING A CALLER SERVICE NUMBER

1.  **[Other Customer Services]**

2.  **<P. 0. Box/Caller Services>>>>**

3.  **<Reserve Caller Service Number>**

4. Key the number.

5. **[Enter]**

6. Key the appropriate information in each field. Press **[Enter]** after each entry.

7. **\<Accept\>**

## 3.4 ENTERING AN ADDITIONAL KEY DEPOSIT

1. **[Other Customer Services]**

2. **\<P. 0. Box/Caller Services\>\>\>\>**

3. **\<Additional Key Deposit\>**

4. Key the P. 0. Box number.

5. **[Enter]**

6. Key the appropriate information in each field. Press **[Enter]** after each entry.

7. Select the number of keys.

8 . **\<Accept\>**

## 3.5 REFUNDING A KEY DEPOSIT

1. **[Other Customer Services]**

2. **\<P. 0. Box/Caller Services\>\>\>\>**

3. **\<Key Deposit Refund\>**

4. Key the appropriate information in each field. Press **[Enter]** after each entry.

5. Select or key the number of keys returned.

6. **\<Accept\>**

## 3.6 REFUNDING P. 0. Box FEES

1. **[Other Customer Services]**

2. **\<P. 0. Box/Caller Services\>\>\>\>**

3. **<P. 0. Box Refund>**

4. Key the appropriate information in each field. Press **[Enter]** after each entry.

5. **<Accept>**

# 4  MAIL  PICKUP

## 4.1    CUSTOMS MAIL PICKUP

1. **[Other Customer Services]**

2. **<Pick-up Mail>**

3. **<Customs Mail Pickup>**

4. Key or scan the customs label number.

5. **[Enter]**

6. Key the customs duty amount.

7. **[Enter]**

8. Key the ZIP Code ONLY if the article's originating ZIP Code is from an APO-FPO.

9. **[Enter]**

10. Key the date of the first attempted delivery.

11. **[Enter]**

12. Select the customs article value.

13. **<Accept>**

14. **<Accept Article>**

    or

    **<Refuse Article>**

15. **[Payment or End of Visit]**

16. Select the method of payment.

## 4.2    **COD** MAIL PICKUP

**TIP: Checks and money orders must be made payable to the mailer.**

1.   **[Other Customer Services]**

2.   **<Pick-up Mail>**

3.   **<COD Mail Pickup>**

4.   Key the COD article number.

5.   **[Enter]**

6.   Key the COD amount.

7.   **[Enter]**

8.   **<Accept>**

9.   **<Accept Article>**

OR

**<Refuse Article>**

10.   **<Check or M. 0. Payable to Mailer (no fee)>** and **<Continue>**

OR

**<All Other Payment Methods ($0.80 fee)>**

11.   **[Payment or End of Visit]**

12.   Select the method of payment

## 4.3    OTHER (NON-AUTOMATED) MAIL PICKUP

1.   **[Other Customer Services]**

2.   **<Pick-up Mail>**

3.   **<All Other Mail Pickup (Non-Automated)>**

## 4.4 POSTAGE DUE WITHOUT TRUST ACCOUNTS

1. **[Stamps & Merchandise]**

2. Key the amount of postage due.

3. **<Print PVI Label>**

4. **[Payment or End of Visit]**

5. Key the amount.

6. Select the payment method.

## 4.5 CARRIER POSTAGE DUE LOG

**TIP: No PVI labels are to be generated. GLA 114 will be adjusted automatically.**

1. **[Other Customer Services]**

2. **<Pick-up Mail>**

3. **<BRM Amount Due>**

4. **<All Other Payment Methods>**

5. Key the total amount from the postage due log.

6. **[Enter]**

7. **<Accept>**

8. **[Payment or End of Visit]**

9. Enter the total dollar amount.

10. Select the method of payment.

## 4.6 VOIDING A COD ENTRY

1. **[Other Customer Services]**

2. **<Pick-up Mail>**

3. **<Void COD Entry>**

4.  Have your supervisor log on.

5.  Highlight the COD article to void.

**6.  <Void COD>**

**7.  [Payment or End of Visit]**

---

## 4.7    VOIDING A CUSTOMS MAIL PICKUP ENTRY

**1.  [Other Customer Services]**

**2.  <Pick-up Mail>**

**3.  <Void Customs Mail Pickup Entry>**

4.  Have your supervisor log on.

5.  Highlight the customs article to void.

**6.  <Void Customs Mail Pickup>**

**7.  [Payment or End of Visit]**

---

# 5    INQUIRIES, CLAIMS, AND REFUNDS

---

## 5.1    CLAIMS AND INQUIRIES

**Follow these three initial steps when processing a claim or inquiry:**

**1.  [Other Customer Services]**

**2.  <Inquiries, Claims, & Refunds>>>>**

**3.  <Claims and Inquiries>**

### A. Insured Claim Inquiry

1.  Complete steps l-3 for processing a claim or inquiry (page 5- 15).

**2.  <Insured Claim>**

3. Key the appropriate information in each field.
Press **[Enter]** after each entry.

4. Key the receipt number.

5. **[Enter]**

6. **<Accept>**

## B. Duplicate Domestic Return Receipt Inquiry

1. Complete steps l-3 for processing a claim or inquiry (page 5- 15).

2. **<Duplicate Domestic Return Receipt>**

3. Key the appropriate information in each field.
Press **[Enter]** after each entry.

4. Key the receipt number.

5. **[Enter]**

6. **<Accept>**

## C. Insurance Inquiry

1. Complete steps 1-3 for processing a claim or inquiry (page 5- 15).

2. **<Insurance Inquiries & Claims>>>>**

3. Select the type of claim or inquiry.

4. Key the appropriate information in each field.
Press **[Enter]** after each entry.

5. Key the receipt number.

6. **[Enter]**

7. **<Accept>**

## D. Registered Inquiry

1. **Complete steps l-3 for processing a claim or inquiry (page 5-15).**

2. **<Registered Inquiries & Claims>>>>**

3. Select the type of inquiry.

4. Key the appropriate information **in** each field. Press **[Enter]** after each entry.

5. Key the receipt number.

**6. [Enter]**

**7. <Accept>**

## E. Return Receipt Inquiry

1. Complete steps l-3 for processing a claim or inquiry (page 5- 15).

2. **<Return Receipt Inquiries & Claims>>>>**

3. Select the type of inquiry.

4. Key the appropriate information in each field. Press **[Enter]** after each entry.

5. Key the receipt number.

6. **[Enter]**

7. **<Accept>**

8. For Return Receipt after Mailing and Verified Receipt for Certified, select a postage type (PVI, stamps, or customer supplied).

## F. Express Mail Inquiry

1. Complete steps l-3 for processing a claim or inquiry (page 5- 15).

2. **<Express Mail Inquiries & Claims>>>>**

3. Select the type of inquiry.

4. Key the appropriate information in each field. Press **[Enter]** after each entry.

5. Key the receipt number.

6. **[Enter]**

7. **<Accept>**

## G. Money Order Inquiry

1. Complete steps 1-3 for processing a claim or inquiry (page 5- 15).

2. **<Money Order Inquiries & Claims>>>>**

3. Select the type of Money Order inquiry.

4. Key the appropriate information in each field. Press **[Enter]** after each entry.

5. **<Accept>**

6. Issue postage.

## H. Other Inquiries & Claims

1. Complete steps l-3 for processing a claim or inquiry (page 5- 15).

2. **<Other Inquiries & Claims>>>>**

3. Select the type of inquiry or claim.

4. Key the appropriate information in each field. Press **[Enter]** after each entry.

5. Key the receipt number.

6. **[Enter]**

7. **<Accept>**

8. Issue postage, when applicable.

---

## 5.2 NON-AUTOMATED TRANSACTIONS (NON-REVENUE)

1. **[Other Customer Services]**

2. **<Non-automated Transactions>>>>**

3. Select a non-automated transaction.

## 5.3   REFUNDS

**For refunds, begin with these three steps:**

1.   **[Other Customer Services]**

2.   **<Inquiries, Claims & Refunds>>>>**

3.   **<Refunds>**

## A. Service Not Rendered, Vending Machine Malfunction, Retail Products & Fees, Miscellaneous Non-Postal Revenue, Postage Applied for BRM, and Express Mail Failure

1.   Complete steps l-3 for Refunds (page 5-19).

2.   Select refund option.

3.   Key the refund amount.

4.   **[Enter]**

5.   For corporate accounts, key all information in the required fields.

6.   **<Accept>**

7.   **<Corporate Account>** or **<Cash Refund>**

## B. Refund for Unused Postage Meter Strips

1.   Complete steps l-3 for Refunds (page 5-19).

2.   **<Unused Postage Meter Strips>>>>**

3.   Select the verification status.

4.   Key the amount to be refunded.

5.   **[Enter]**

6.   Have the customer complete a Form 3533.

    OR

7. Key the appropriate information in each field. Press **[Enter]** after each entry.

8. **<Accept>**

# 6 MANAGING CUSTOMER METERS

## 6.1 SETTING AND EXAMINING A METER

1. **[Other Customer Services]**

2. **<Customer Meter>>>>**

3. **<Set Meter>** or **<Examine Meter>**

4. Scan bar-coded serial number on meter.

5. **[Enter]**

6. Select the meter manufacturer.

7. Key the appropriate information in each field. Press **[Enter]** after each entry.

8. Select the meter reading unit value.

9. Key the descending register.

10. **[Enter]**

11. Key the ascending resister.

12. **[Enter]**

13. **<Accept>**

14. **<Control Total Correct>** if Register Readings and Control Total are correct.

15. If **Set Meter** was selected, key the dollar amount of setting.

16. **[Enter]**

17. **<Descending Register Correct – Continue>**

   OR

   **<Control Total Incorrect – Reenter Values>**

   OR

   **<Control Total Incorrect – Override>**

18. Key the new seal number.

19. **[Enter]**

20. **<Accept>**

21. Select the payment method.

---

## 6.2    TRANSFERRING POSTAGE TO A CUSTOMER METER

1. **[Customer Services]**

2. **<Customer Meter>>>>**

3. **<Transfer of Postage>**

4. Key the appropriate information for the transferring (FROM) meter in each field. Press **Enter** after each entry.

5. **<Accept>**

6. **<Control Total Correct>**

7. Key the appropriate information for the receiving (TO) meter in each field. Press **[Enter]** after each entry.

8. **<Accept>**

9. **<Control Total Correct>**

10. Key the dollar amount to be transferred.

11. **[Enter]**

12. **<Correct Value on Both Meters – Continue>**

13. **<Done>**

---

## 6.3 REPLACING A CUSTOMER METER

1. (Other Customer Services]

2. **<Customer Meter>>>>**

3. **<Replace Meter>**

4. Key the appropriate information for the meter being replaced (OLD) in each field. Press **[Enter]** after each entry.

5. **<Accept>**

6. **<Control Total Correct>**

7. Key the appropriate information for the NEW meter in each field. Press **[Enter]** after each entry.

8. **<Accept>**

9. **<Control Total Correct>**

10. **<Correct Values on Both Meters – Continue>**

11. Key the new seal numbers.

12. **[Enter]**

13. **<Done>**

---

## 6.4 WITHDRAWING A METER FROM SERVICE

1. **[Other Customer Services]**

2. **<Customer Meter>>>>**

3. **<Withdraw Meter From Service>**

4. **<Accept>**

5. Key the appropriate information in each field. Press **[Enter]** after each entry.

6. **<Accept>**

7. **<Control Total Correct>**

8. Select the reason for withdrawal.

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9. **<Accept>**

10. Enter the refund amount. if any.

11. **<Accept>**

12. Select the refund payment method.

13. Once the customer has completed a PS Form 3533:
    **<PS Form 3533 Completed>**

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# SECTION 6: PAYMENT/END OF VISIT

## 1 CASH TRANSACTIONS

1. **[Payment or End of Visit]**

2. Key the amount received from the customer.

3. **<Cash>**

## 2 CHECK TRANSACTIONS

### 2.1 PERSONAL CHECK TRANSACTIONS

1. **[Payment or End of Visit]**

2. Key the check amount.

3. **<Check>**

4. **<Authorize and Endorse Only>**

5. Insert the check in the printer for authorization and endorsement, as shown on screen.

   OR

   **<Print Check>**

   Insert the check to print as shown on screen.

   **<Start Check Printing>**

6. Insert the check again to authorize and endorse as shown on screen.

## 2.2 TRAVELER'S CHECK TRANSACTIONS

1. **[Payment or End of Visit]**

2. Key the check amount.

3. **<Traveler's Check>**

## 2.3 CASHIER'S CHECK TRANSACTIONS

1. **[Payment or End of Visit]**

2. Key the check amount.

3. **<Cashier's Check>**

4. Manually enter the account number and insert check face down in the printer.

    OR

    Simply insert check face down in the printer.

## 2.4 TREASURY CHECK TRANSACTIONS

1. **[Other Customer Services]**

2. **<Other Transactions>>>>**

3. **<Cash Treasury or USPS Checks>**

4. Key the check amount.

5. **[Enter]**

6. Scan the treasury check.

7. **<Accept>**

8. **[Payment or End of Visit]**

9. Key the amount due to the customer.

10. Select the tender method.

11. Insert the treasury check face down in the printer for endorsement.

## 3      MONEY ORDER TRANSACTIONS

## 3.1     POSTAL MONEY ORDER TRANSACTIONS (DOMESTIC/INTERNATIONAL)

1. **[Payment or End of Visit]**

2. Key the postal money order amount.

3. **<Postal Money Order>**

4. Authorize the money order.

## 3.2     NON-POSTAL MONEY ORDER TRANSACTIONS

1. **[Payment or End of Visit]**

2. Key the non-postal money order amount.

3. **<Non-Postal Money Order>**

4. Endorse the money order.

## 4   COMBINED PAYMENT TRANSACTIONS

**TIP: Always enter the fixed amount method first.**

1. **[Payment or End of Visit]**

2. Key the initial payment amount.

3. Select the initial payment method.

4. Key the additional payment.

5. Select the additional payment method.

## 5      CREDIT CARD TRANSACTIONS

**TIP:**   **Wait for Verifone approval before pressing <Accept>.**

1. **[Payment or End of Visit]**

2. Key the amount.

3. **<Credit Card>**

4. **<Accepted>** or **<Rejected>**

5. If rejected, select another method of payment.

## 6      DEBIT CARD TRANSACTIONS

**TIP:**   **Wait for Verifone approval before pressing <Accept>.**

1. **[Payment or End of Visit]**

2. Key the amount.

3. **<Debit Card>**

4. Select the amount of cash back requested.

5. **<Continue>**

6. **<Accepted>** or **<Rejected>**

7. Issue cash back to the customer.

   OR

   If rejected, select another method of payment.

## 7      LIBERTYCASH OR POSTAL PAYMENT CARD TRANSACTION

1. **[Payment or End of Visit]**

2. **<More Payment Methods>**

3. Key the amount.

4. **<LibertyCash>** or **<Postal Payment Card>**

5. **<Accepted>** or **<Rejected>**

6. If rejected. select another method of payment.

---

# 8 ADDING A PURCHASE AT THE PAYMENT SCREEN

1. After **[Payment or End of Visit].** but before tender selection:

   **[Stamps & Merchandise]**

   OR

   **[Mailing]**

   OR

   **[Other Customer Services]**

2. Process the sale/service.

3. **[Payment or End of Visit]**

---

# 9 CHANGING PAYMENT METHODS AT END OF VISIT

1. **[Previous Screen]**

2. **[Payment or End of Visit]**

3. Select the correct method of payment.

---

# 10 EDITING/VOIDING TRANSACTIONS

## 10.1 VOIDING AN ENTIRE TRANSACTION

1. **[Up Arrow]**

2. Highlight the item to be edited.

3. Select the Void function you want to perform.

## 10. 2 EDITING A TRANSACTION FROM THE PAYMENT SCREEN

1. **[Stamps & Merchandise]**

   OR

   **[Mailing]**

   OR

   **[Other Customer Services]**

2. **[Up Scroll]**

3. Highlight the item to be changed/voided.

4. **<Void Item (or Refund Item)>**

5. **<Exit Edit Mode>**