

## 12 Local cost account administration

The PostBase Vision mailing system has the ability to record and assign postal expenditures by cost account. To do so, cost accounts must be set up in the discoverFP customer portal. After synchronizing with the customer portal (refer to chapter 13 for more information), the cost account function will have been added to your mailing system.

The usage data are stored both in the mailing system's local cost account counters as well as sent to the customer portal regularly for recording and analysis. The local cost account counter and data storage in the portal run independently from one another.

The reporting and administration functions available on the PostBase Vision mailing system for cost accounts are described below.

### 12.1 Display cost account report



- Open the MENU.
- Choose LOCAL ACCOUNTS.
- Choose SHOW REPORT.

Cost Account Name	Value	Counter
Cost Account 1	\$28.000	35
Cost Account 2	\$0.000	0
Cost Account 3	\$20.500	33
Cost Account 4	\$20.000	32
Cost Account 5	\$0.850	2
Cost Account 6	\$0.000	0
Cost Account 7	\$131.050	272
Cost Account 8	\$51.500	75

✔ OK

PostBase Vision shows the list of all cost accounts with the current usage data (value and number of mailings).

#### Works Cited:

## 12.2 Display usage data for a defined cost account



- Open the MENU.
- Choose LOCAL ACCOUNTS.
- Choose REPORT ONE ACCOUNT.

PostBase Vision opens the selection list with all cost accounts. The current cost account is highlighted in color.

- Tap on the cost account that you want to see usage data for.

PostBase Vision displays the usage data (value and number of mailings) for this cost account.

Cost Account Name	Value	Counter
Cost Account 4	\$20,000	32

✓ OK

### Works Cited:

## 12.3 Deleting usage data

You can delete the usage data for individual cost accounts or for all cost accounts at once. Clearing the cost account counters has no effect on the cost account reporting on the discoverFP customer portal.



### Set one account to zero

- Open the MENU.
- Choose LOCAL ACCOUNTS.
- Choose RESET TO ZERO.

PostBase Vision opens the selection list with all cost accounts. The current cost account is highlighted in color.

- Tap on the cost account for which you want usage data to be deleted.

After a confirmation prompt, the value and number of mailings for this cost account are reset to zero.



### Set all accounts to zero

- Open the MENU.
- Choose LOCAL ACCOUNTS.
- Choose RESET ALL TO ZERO.

After a confirmation prompt, the usage data (value and number of mailings) for all cost accounts are deleted. All cost account counters are reset to zero.

#### Works Cited:

## 12.4 Matching cost accounts to advertising imprints

You can assign default advertising imprints to each cost account. When setting the cost account, the advertising imprints are then automatically set according to this default setting.



- Open the MENU.
- Choose LOCAL ACCOUNTS.
- Choose LINK ADVERT TO ACCOUNT.

PostBase Vision opens the selection list with all cost accounts. The current cost account is highlighted in color.

- Tap on the cost account that you want to match advertising imprints to.

PostBase Vision opens the window for setting the default advertising imprints.

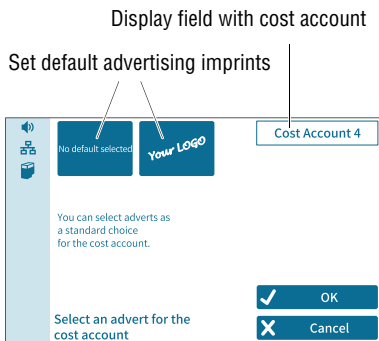
You see

- the cost account and
- the two advertising imprint buttons with the current default setting.

- Select the desired setting for both advertising imprints.

**Note:** The table on the next page shows and explains the possible settings. The settings themselves are made in the same way as in the home screen.

- Tap OK to save the displayed default value for this cost account.



Works Cited:

---

The possible settings and their meaning:

---

NO DEFAULT SELECTED	When setting up the cost accounts, the advertising imprints in the home screen remain unchanged.
NO ADVERT OR TEXT	When setting the cost account, the advertising imprints are switched off. No advert / Text / QR Code is printed here.
An advert, a text or a QR code	This advertising imprint is set along with the cost account.

---

Works Cited: