

PitneyShip™ Pro Regional Admin Training



**Mail Equipment
and Postage**



**Home and Small
Office Mail**



**USPS®
Permit Accounts**



**Outsourced
Mail Services**



**Expedited Document
and Parcel Shipping**

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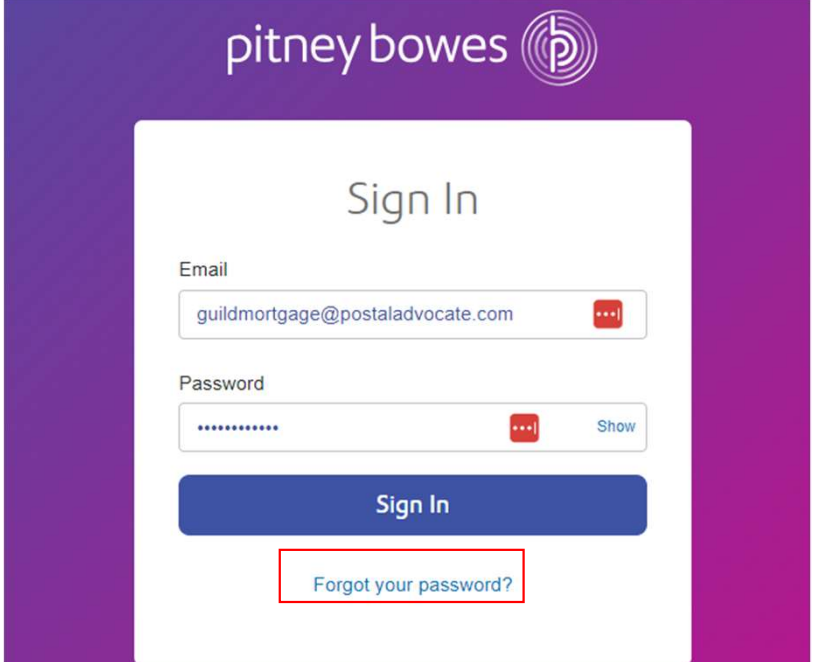
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How to Log Into PitneyShip Pro

Link to the Application –

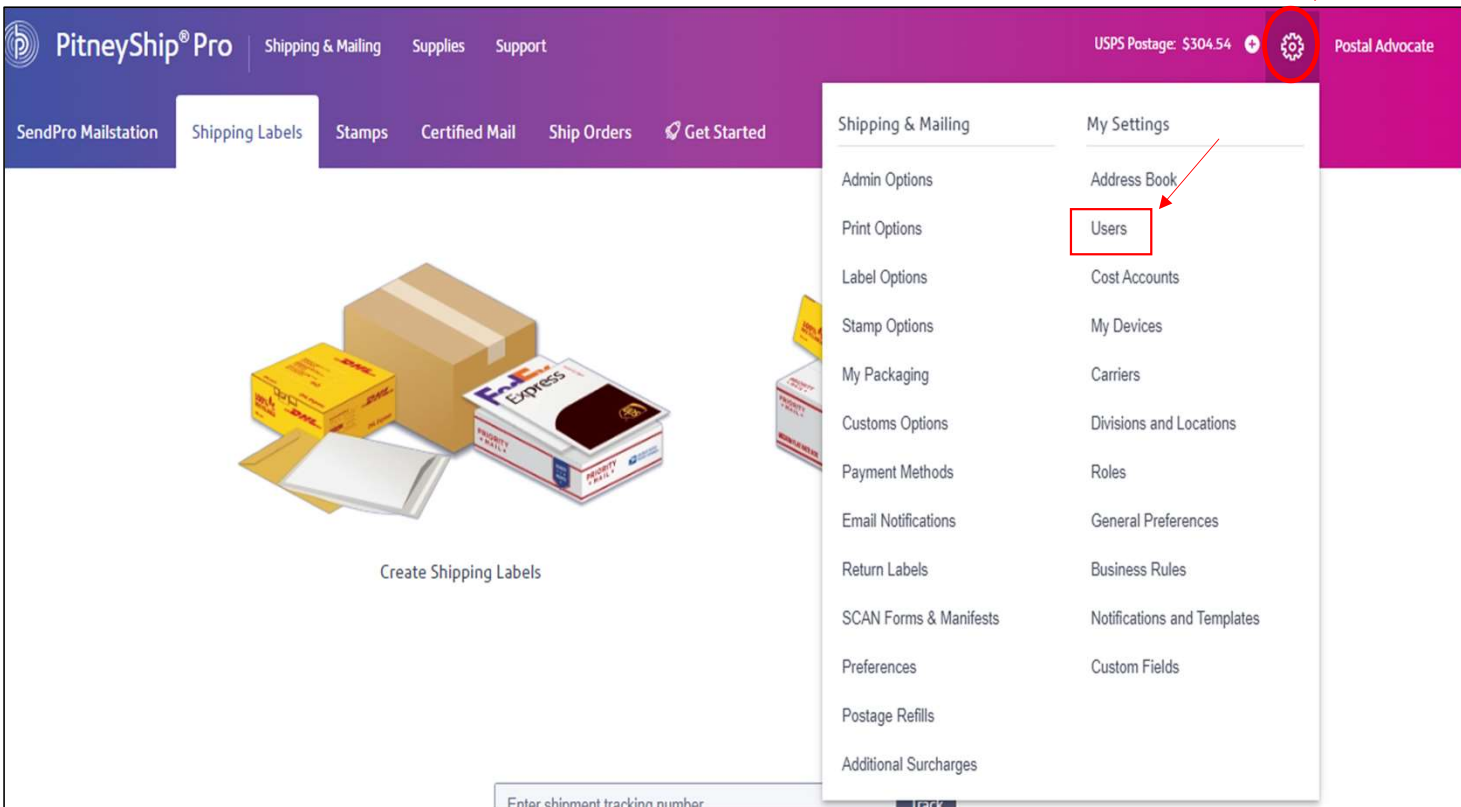
With this [link](#), enter your username and password and click ‘Sign In’

If you forgot your password, click in the ‘**Forgot your password**’ icon and follow the instructions to reset it.



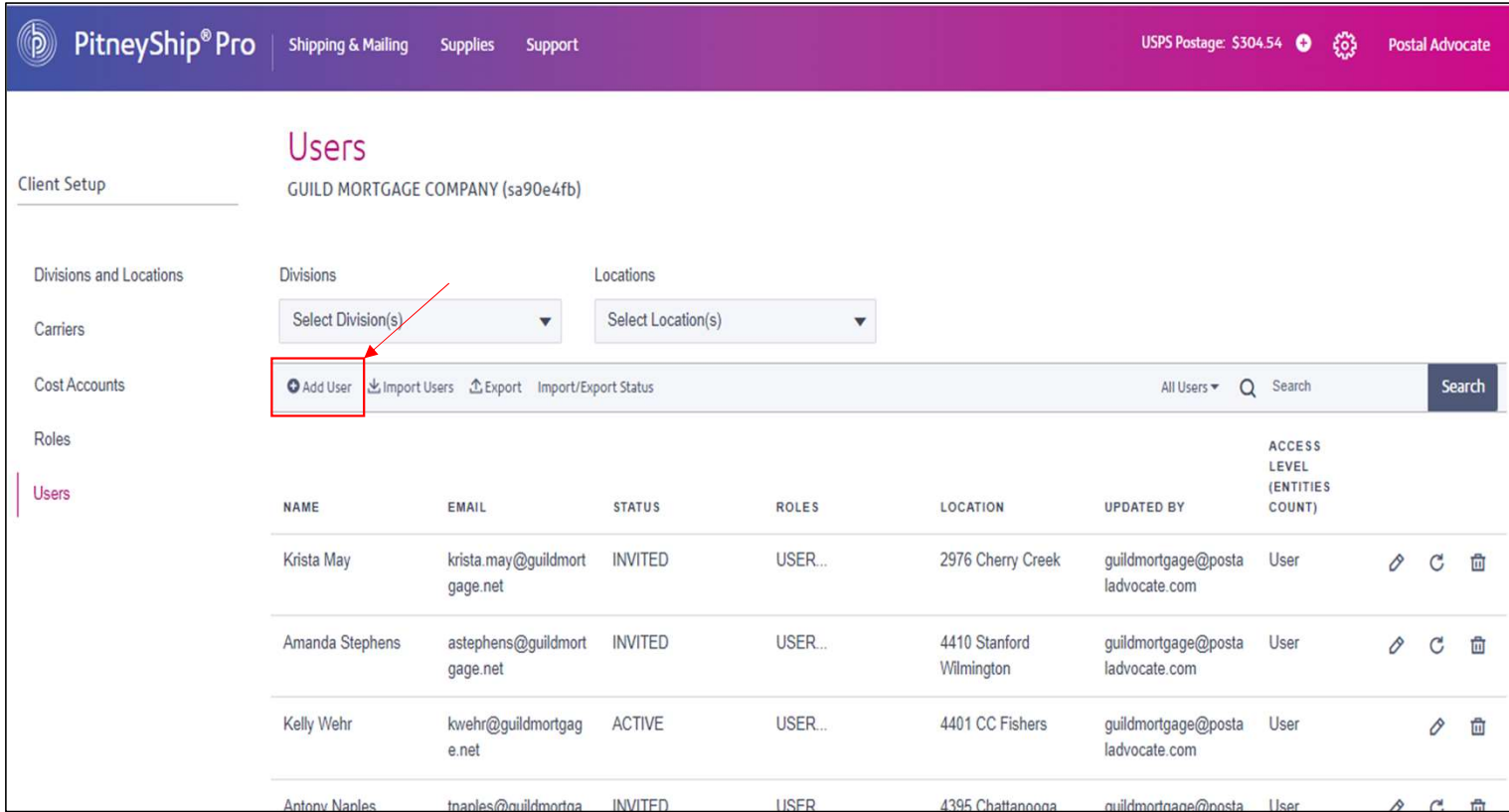
The screenshot shows the Pitney Bowes Sign In page. The page has a purple header with the Pitney Bowes logo and the text "pitney bowes". Below the header is a white sign-in form. The form has a title "Sign In". There are two input fields: "Email" with the value "guildmortgage@postaladvocate.com" and a red eye icon to the right; and "Password" with a red eye icon and a "Show" link to the right. Below the input fields is a blue "Sign In" button. At the bottom of the form is a red-bordered button labeled "Forgot your password?".

Add New Users














1. Click on settings  then 'users'

Add New Users

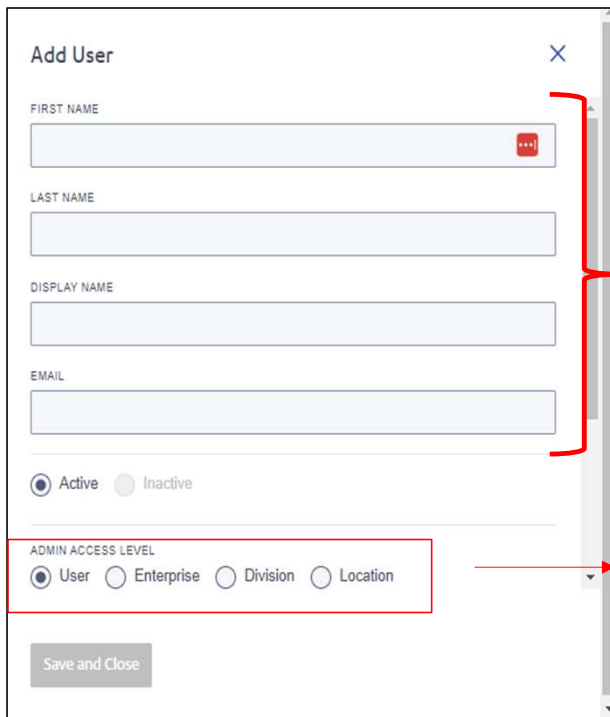


The screenshot shows the 'Users' management interface for 'GUILD MORTGAGE COMPANY (sa90e4fb)'. The page includes a sidebar with navigation options like 'Client Setup', 'Divisions and Locations', 'Carriers', 'Cost Accounts', and 'Roles'. The main content area has dropdowns for 'Divisions' and 'Locations'. Below these are buttons for 'Add User', 'Import Users', 'Export', and 'Import/Export Status'. A search bar is also present. A table lists existing users with columns for Name, Email, Status, Roles, Location, Updated By, and Access Level. The 'Add User' button is highlighted with a red box and a red arrow.

NAME	EMAIL	STATUS	ROLES	LOCATION	UPDATED BY	ACCESS LEVEL (ENTITIES COUNT)	
Krista May	krista.may@guildmortgage.net	INVITED	USER...	2976 Cherry Creek	guildmortgage@postaladvocate.com	User	  
Amanda Stephens	astephens@guildmortgage.net	INVITED	USER...	4410 Stanford Wilmington	guildmortgage@postaladvocate.com	User	  
Kelly Wehr	kwehr@guildmortgage.net	ACTIVE	USER...	4401 CC Fishers	guildmortgage@postaladvocate.com	User	 
Antony Naples	tnaples@guildmortgage.net	INVITED	USER...	4395 Chattanooga	guildmortgage@postaladvocate.com	User	  

2. Click in 'add user'

Add New Users



Add User

FIRST NAME

LAST NAME

DISPLAY NAME

EMAIL

Active Inactive

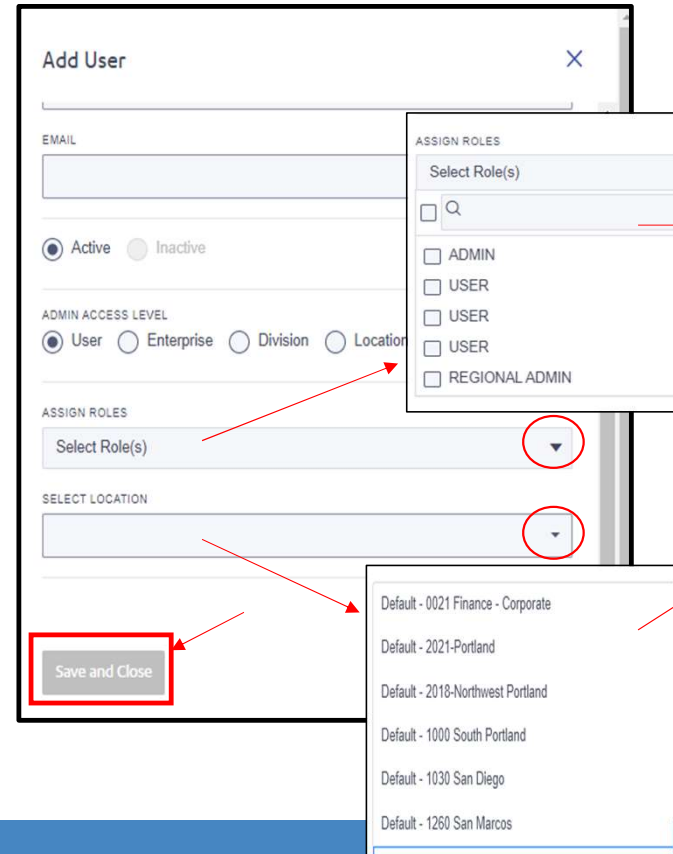
ADMIN ACCESS LEVEL

User Enterprise Division Location

Save and Close

3. Enter user first name, last name and email.

4. Select Admin access lever. Regular user, enterprise user, division or location.
Most users are setup as user only.



Add User

EMAIL

Active Inactive

ADMIN ACCESS LEVEL

User Enterprise Division Location

ASSIGN ROLES

Select Role(s)

ADMIN

USER

USER

USER

REGIONAL ADMIN

SELECT LOCATION

Default - 0021 Finance - Corporate

Default - 2021-Portland

Default - 2018-Northwest Portland

Default - 1000 South Portland

Default - 1030 San Diego

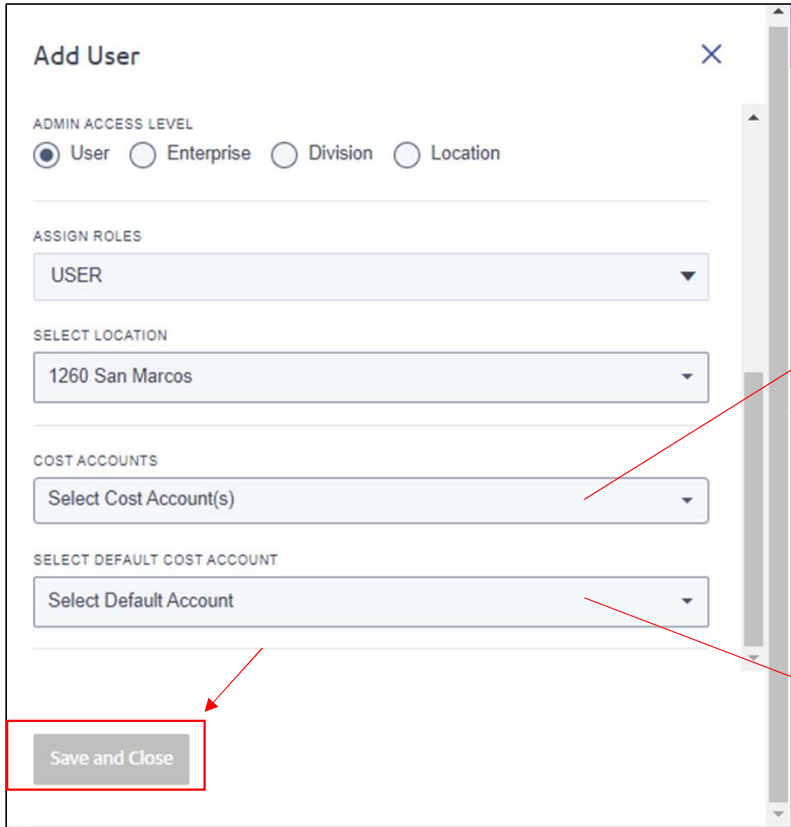
Default - 1260 San Marcos

Save and Close

5. Assign the role for the user.

6. Select the location you want to add the user to.

Add New Users



Add User [X]

ADMIN ACCESS LEVEL
 User Enterprise Division Location

ASSIGN ROLES
USER

SELECT LOCATION
1260 San Marcos

COST ACCOUNTS
Select Cost Account(s)

SELECT DEFAULT COST ACCOUNT
Select Default Account

Save and Close

- 0021 Finance
- 1000 South Portland
- 1001 Sales
- 1030 San Diego
- 1260 San Marcos
- 1370 Paden
- 1400 Billing
- Select Cost Account(s)

- 0021 Finance
- 1000 South Portland
- 1001 Sales
- 1030 San Diego
- 1260 San Marcos
- 1370 Paden
- 1400 Billing
- Select Default Account

7. When adding a user you can select the cost account (s) you want the user to be tied to. Click on the drop down on **'Cost Accounts'** and **'Select Default Cost Account'** and choose from the available cost accounts from the list.

Click **'save and close'**

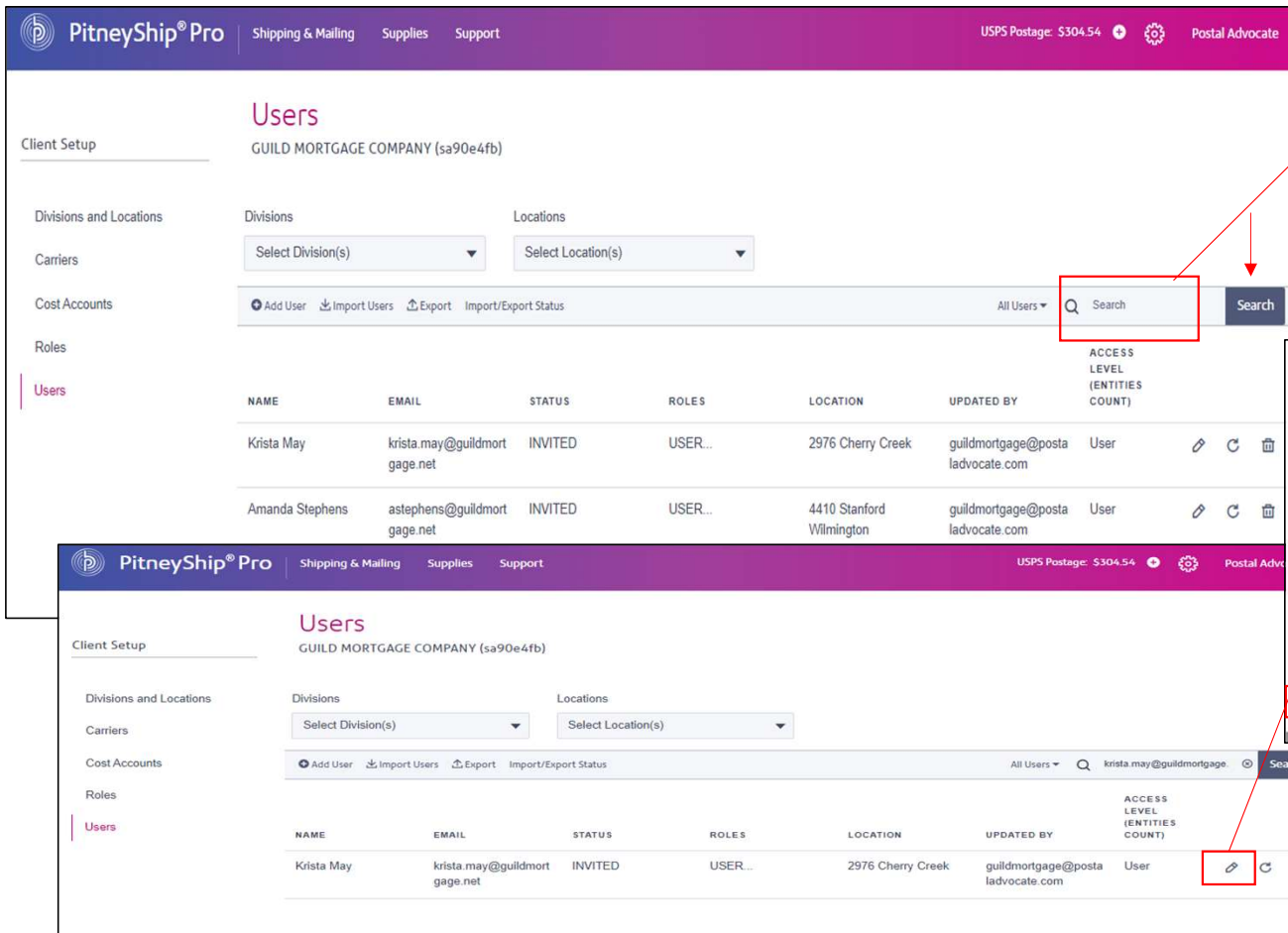
Update existing users' information

1. In users, search for the user you want to update the information for. You can only search by their email.

2. Click on the 'edit button'



3. Edit the information for the user and then click 'save and close'.

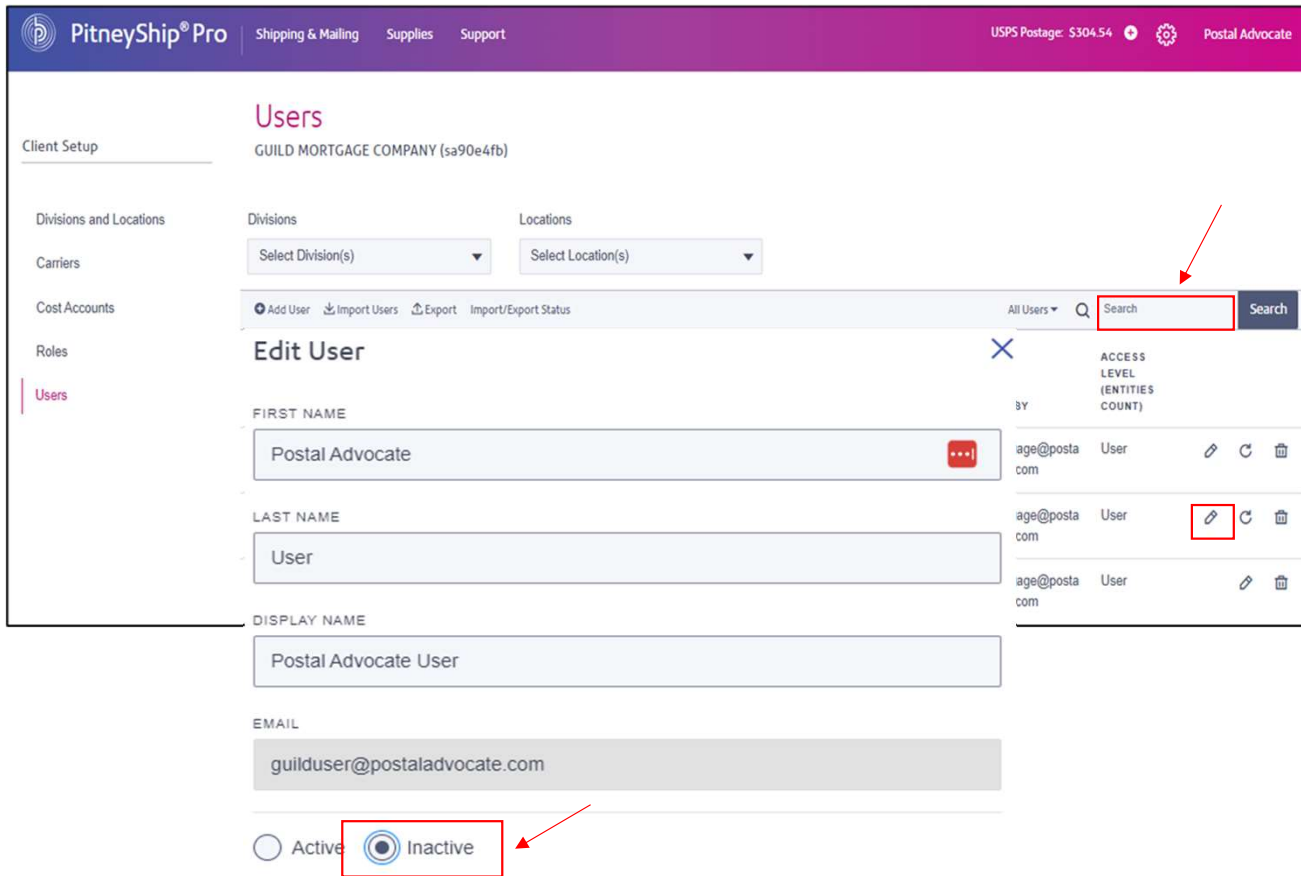


The screenshot shows the PitneyShip Pro interface for managing users. The top navigation bar includes 'Shipping & Mailing', 'Supplies', and 'Support'. The main header displays 'USPS Postage: \$304.54' and 'Postal Advocate'. The left sidebar contains 'Client Setup', 'Divisions and Locations', 'Carriers', 'Cost Accounts', and 'Roles'. The main content area is titled 'Users' and shows a table of users for 'GUILD MORTGAGE COMPANY (sa90e4fb)'. The table has columns for NAME, EMAIL, STATUS, ROLES, LOCATION, and UPDATED BY. Two users are listed: Krista May and Amanda Stephens. A search bar is located above the table, and a red box highlights the search input field. A red arrow points from the search bar to the 'edit button' (pencil icon) in the table row for Krista May. A second screenshot shows the 'Edit User' dialog box with fields for FIRST NAME, LAST NAME, DISPLAY NAME, and EMAIL. The 'Save and Close' button is highlighted with a red box.


NAME	EMAIL	STATUS	ROLES	LOCATION	UPDATED BY	ACCESS LEVEL (ENTITIES COUNT)
Krista May	krista.may@guildmortgage.net	INVITED	USER...	2976 Cherry Creek	guildmortgage@postaladvocate.com	User
Amanda Stephens	astephens@guildmortgage.net	INVITED	USER...	4410 Stanford Wilmington	guildmortgage@postaladvocate.com	User

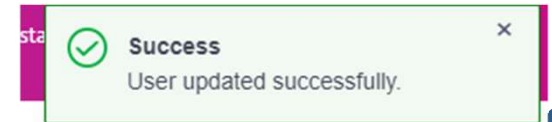
Remove Users/ Make inactive

If users are active in PSP, you do not want to delete them, you will update their profile to inactive. That way you do not lose data and reporting for them.

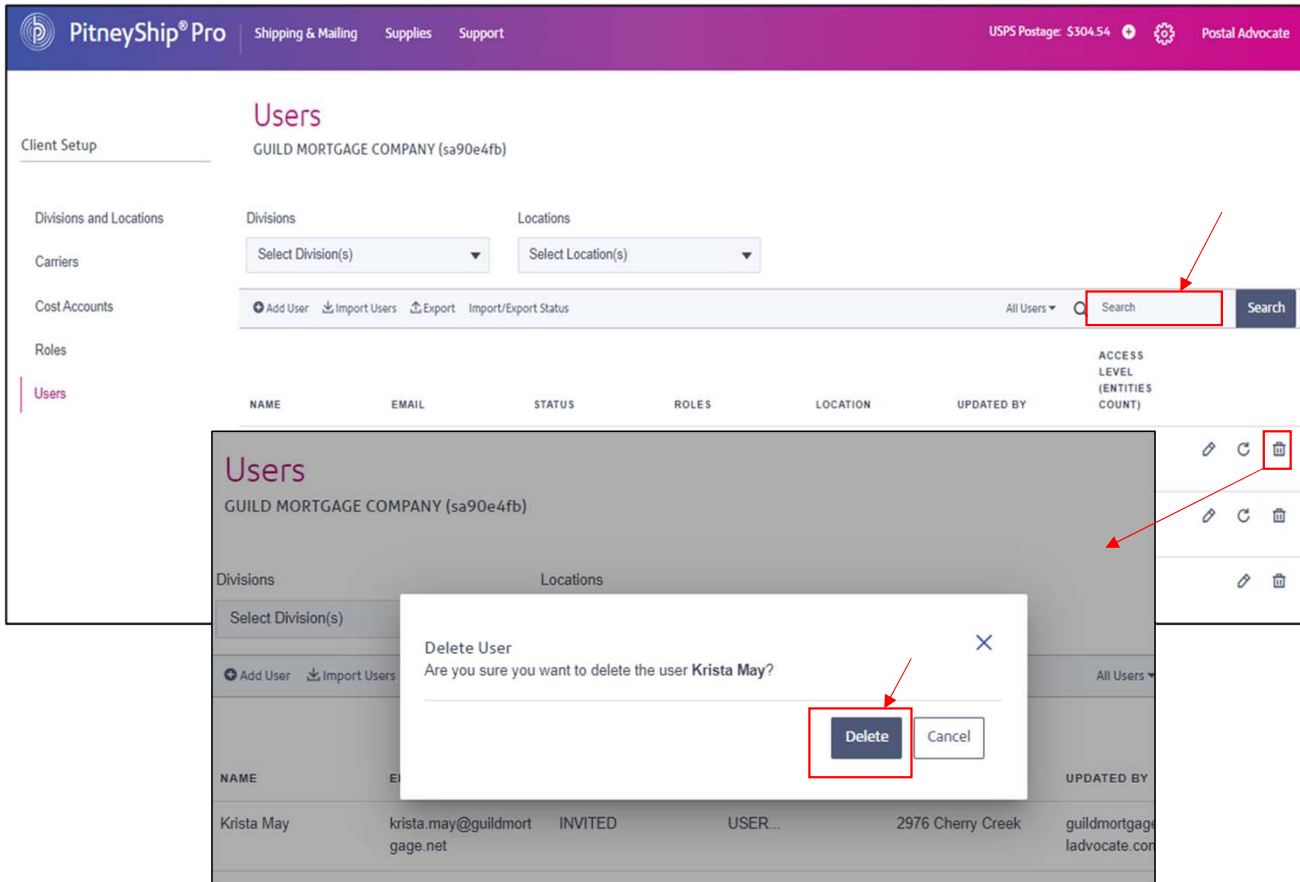


The screenshot shows the 'Edit User' modal in the PitneyShip Pro interface. The modal includes fields for 'FIRST NAME' (Postal Advocate), 'LAST NAME' (User), 'DISPLAY NAME' (Postal Advocate User), and 'EMAIL' (guilduser@postaladvocate.com). At the bottom, there are two radio buttons: 'Active' and 'Inactive'. The 'Inactive' radio button is selected and highlighted with a red box. A red arrow points from the search bar in the background to the 'Inactive' button.

1. In users, search for the user you want to make inactive. You can only search by their email.
2. Click on the 'pencil' 
3. Click the inactive button on the users' profile and click save and close.
4. A green box will show on the top right letting you know if the profile was updated successfully.




Deleting Users that have not logged in

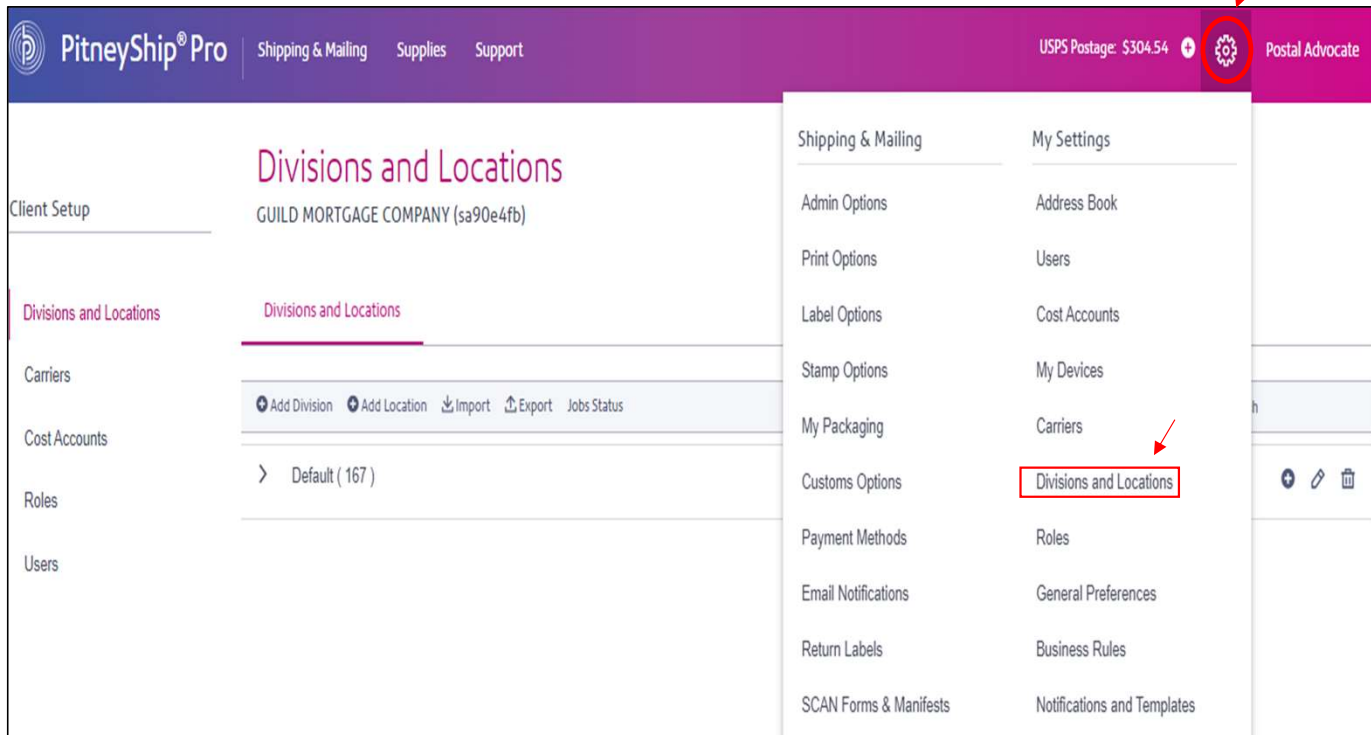


The screenshot shows the PitneyShip Pro interface for managing users. The top navigation bar includes 'Shipping & Mailing', 'Supplies', and 'Support'. The main header displays 'USPS Postage: \$304.54' and 'Postal Advocate'. The page title is 'Users' for 'GUILD MORTGAGE COMPANY (sa90e4fb)'. On the left, there are navigation links for 'Client Setup', 'Divisions and Locations', 'Carriers', 'Cost Accounts', and 'Roles'. The main content area features a search bar with a red box around it and a red arrow pointing to it. Below the search bar is a table of users with columns for NAME, EMAIL, STATUS, ROLES, LOCATION, UPDATED BY, and ACCESS LEVEL. A red box highlights the delete icon (trash can) in the action column of the table. A 'Delete User' dialog box is open, asking 'Are you sure you want to delete the user Krista May?'. The 'Delete' button in the dialog is highlighted with a red box and a red arrow.


NAME	EMAIL	STATUS	ROLES	LOCATION	UPDATED BY	ACCESS LEVEL (ENTITIES COUNT)
Krista May	krista.may@guildmortgage.net	INVITED	USER...	2976 Cherry Creek	guildmortgage.ladvocate.com	

1. In users, search for the user you want to delete. You can only search by their email.
2. Click on the **'delete button'** 
3. The pop up will ask you if you are sure you want to delete the user, click **'Delete'** to confirm.

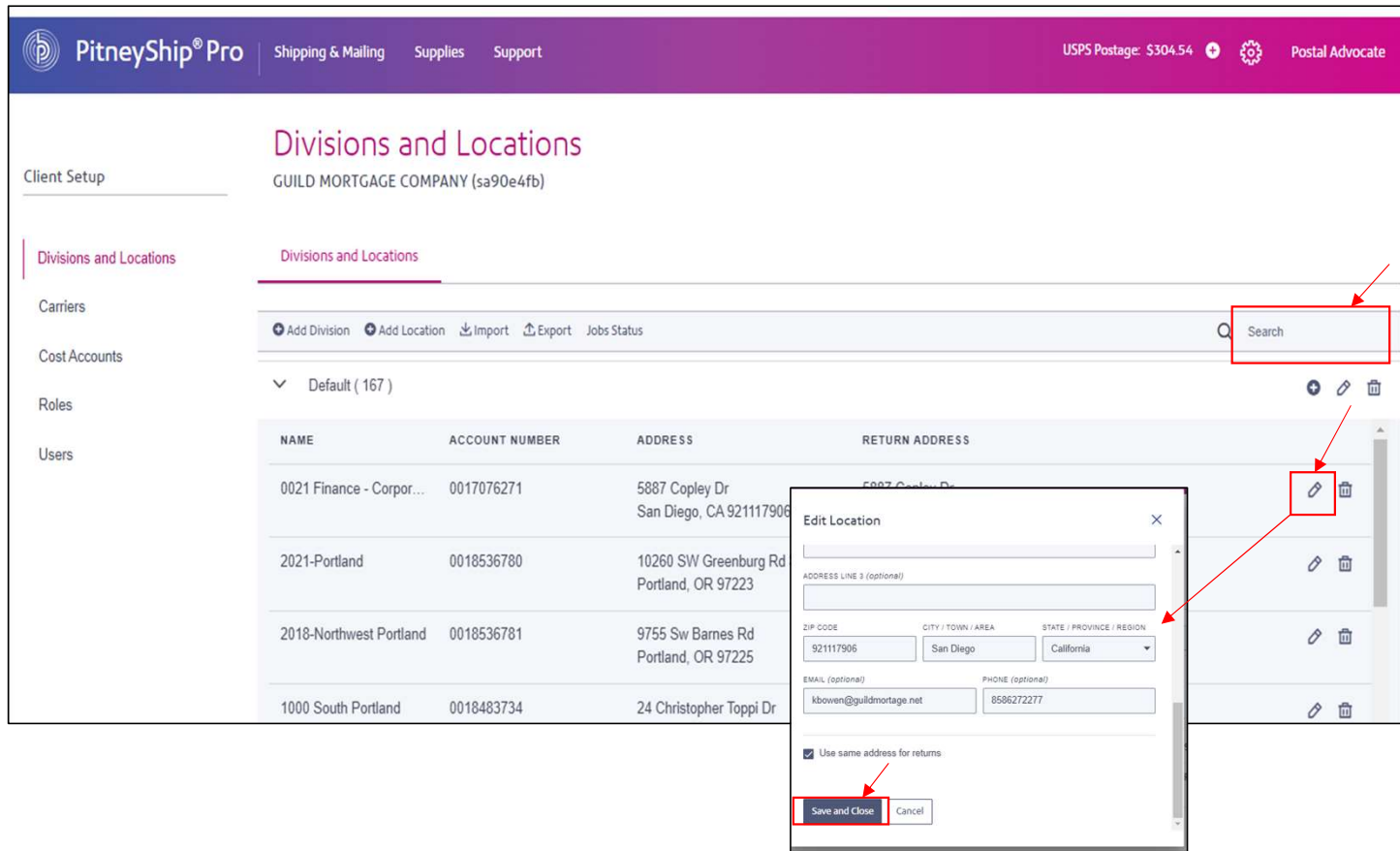
Update addresses for branches



The screenshot shows the PitneyShip Pro interface. The top navigation bar includes 'PitneyShip Pro', 'Shipping & Mailing', 'Supplies', and 'Support'. On the right, it displays 'USPS Postage: \$304.54' and a 'Postal Advocate' logo. A settings gear icon is circled in red with an arrow pointing to it. A dropdown menu is open, listing various settings categories. The 'Divisions and Locations' option is highlighted with a red box and an arrow. The main content area shows the 'Divisions and Locations' section for 'GUILD MORTGAGE COMPANY (sa90e4fb)'. It includes a sidebar with navigation options like 'Carriers', 'Cost Accounts', 'Roles', and 'Users'. The main content area has a sub-header 'Divisions and Locations' and a list of items, currently showing 'Default (167)'.

1. Click on **'settings'** 
2. Click on **'Divisions and Locations'**

Update addresses for branches



The screenshot displays the 'Divisions and Locations' page in PitneyShip Pro. The page header includes 'PitneyShip Pro' and navigation links for 'Shipping & Mailing', 'Supplies', and 'Support'. The main content area shows the 'Divisions and Locations' section for 'GUILD MORTGAGE COMPANY (sa90e4fb)'. A search bar is located at the top right of the table area. Below the search bar, there are icons for '+', 'edit', and 'trash'. The table lists several locations with their respective account numbers and addresses. An 'Edit Location' modal window is open, showing fields for ADDRESS LINE 1, ADDRESS LINE 3 (optional), ZIP CODE, CITY/TOWN/AREA, STATE/PROVINCE/REGION, EMAIL (optional), and PHONE (optional). The 'Save and Close' button is highlighted in red.

NAME	ACCOUNT NUMBER	ADDRESS	RETURN ADDRESS
0021 Finance - Corpor...	0017076271	5887 Copley Dr San Diego, CA 92117906	5887 Copley Dr San Diego, CA 92117906
2021-Portland	0018536780	10260 SW Greenburg Rd Portland, OR 97223	
2018-Northwest Portland	0018536781	9755 Sw Barnes Rd Portland, OR 97225	
1000 South Portland	0018483734	24 Christopher Toppi Dr	

3. In Divisions and Locations, search for the location/branch you want to update the information for. You can only search by the branch name.

4. Click on the 'edit button'

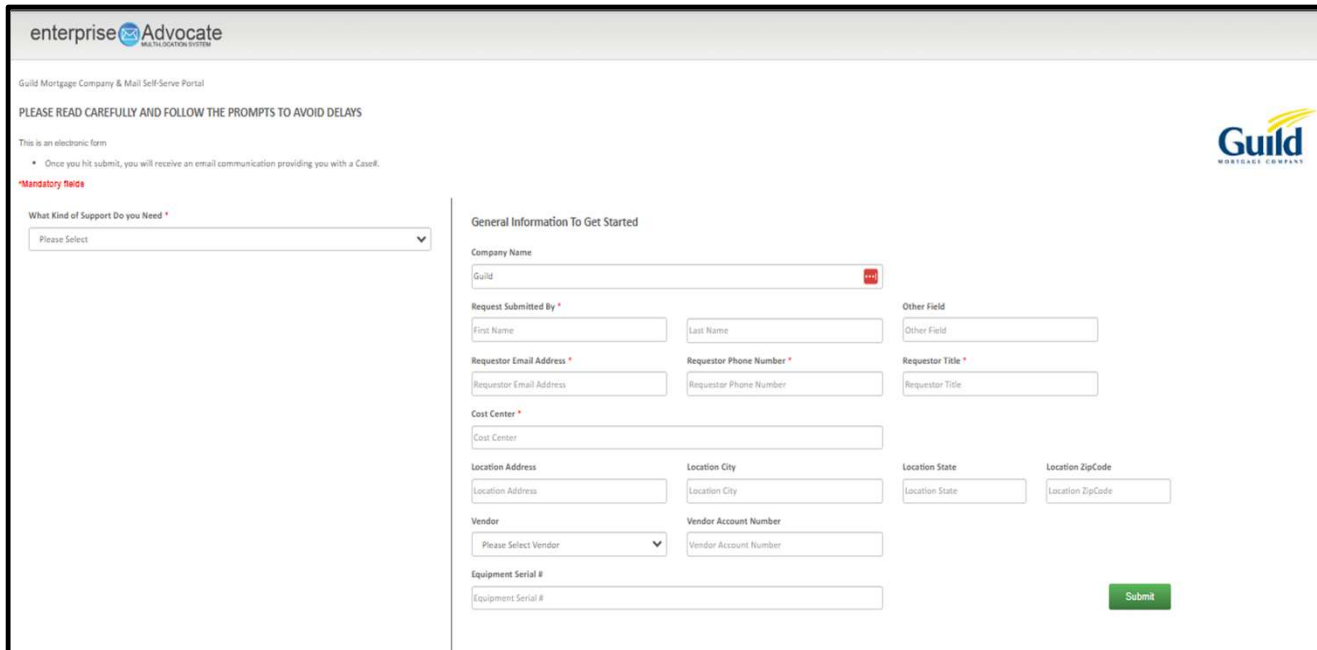
5. Edit the information for the branch and click 'Save and Close'

Internal Guild Mortgage Support

For New Branch Setups, Closing Branches, Branches moving from Region to Region please submit a case through our **Internal Guild Mortgage Support link below** -

<https://www.postaladvocate.net/index.php?/landingpage/Guild>

Select the kind of support you need, enter the information on the right and then hit next. A case will be created, you will get an email confirming the case number, and Postal Advocate will reach back within 24 hours to help resolve the issue.



The screenshot shows the 'Enterprise Advocate' web portal for Guild Mortgage Company. The page title is 'Guild Mortgage Company & Mail Self-Serve Portal'. It includes a warning to read prompts carefully and a note that this is an electronic form. A dropdown menu is labeled 'What Kind of Support Do you Need *' with 'Please Select' as the current selection. The main form area is titled 'General Information To Get Started' and contains several input fields: 'Company Name' (pre-filled with 'Guild'), 'Request Submitted By *' (with sub-fields for First Name, Last Name, and Other Field), 'Requestor Email Address *', 'Requestor Phone Number *', and 'Requestor Title *'. There are also fields for 'Cost Center *', 'Location Address', 'Location City', 'Location State', and 'Location ZipCode'. At the bottom, there are fields for 'Vendor' (a dropdown menu), 'Vendor Account Number', and 'Equipment Serial #' (with a sub-field for 'Equipment Serial #'). A green 'Submit' button is located at the bottom right of the form.