

PitneyShip™ Pro Training



**Mail Equipment
and Postage**



**Home and Small
Office Mail**



**USPS®
Permit Accounts**



**Outsourced
Mail Services**



**Expedited Document
and Parcel Shipping**

What is PitneyShip™ Pro?

PitneyShip™ Pro is a cloud-based solution that scales easily across your organization, allowing employees to create carrier shipping labels and print postage regardless of location. Real-time data provides better insights and visibility into your shipping activity, helping you save time and money on every package you send.

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How to Log In to PB Ship Pro

- **Link to the Application** - <https://sendpro360.pitneybowes.com> (This should work with Single Sign-On) – If it asks you for a username and password, you may not be set up properly. Please submit a case through our portal below to make sure your credentials are entered properly.
- **Internal Raymond James Support** – link to submit a case is:
<https://www.postaladvocate.net/index.php?/landingpage/raymondjames>
- Select the kind of support you need, enter the information on the right and then hit submit. A case will be created, you will get an email confirming the case number, and Postal Advocate will get back to you within 4 hours.

Case Submission

RAYMOND James Financial Inc. Postal Advocate Shipping & Mail Case Portal.

PLEASE READ CAREFULLY AND FOLLOW THE PROMPTS TO AVOID DELAYS

This is an electronic form

- Once you hit submit, you will receive an email communication providing you with a Case # and details for being contacted by Postal Advocate.

***Mandatory fields**

What Kind of Support Do you Need *

RAYMOND JAMES

General Information To Get Started

Company Name

Request Submitted By *

Other Field

Requestor Email Address *

Requestor Phone Number *

Requestor Title *

Branch Code *

Location Address *

Location City *

Location State

Location ZipCode

Vendor

Vendor Account Number

Equipment Serial #

Submit

How to be added to the PitneyShip Pro AD group for Single Sign On

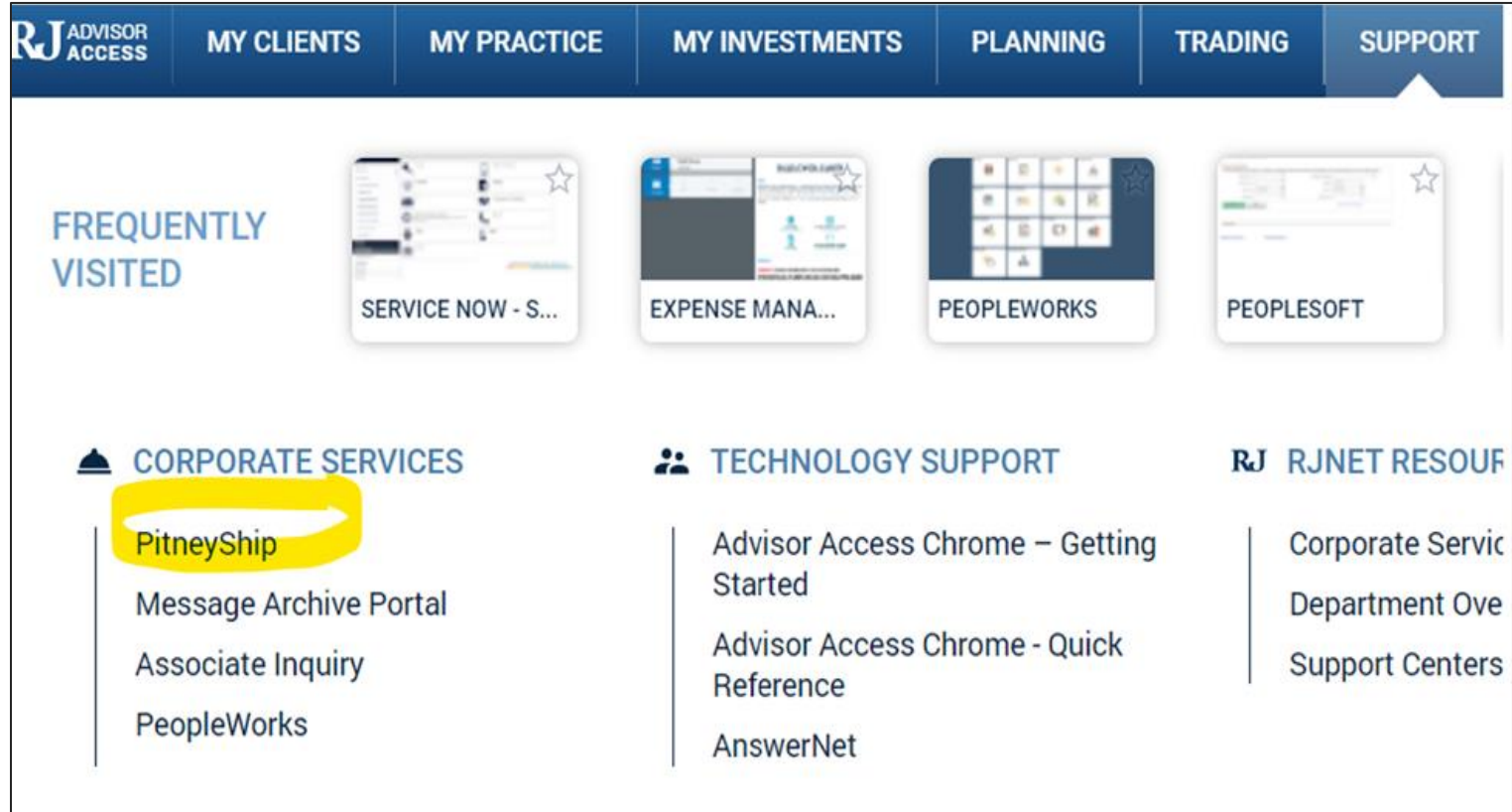
To be added to the PitneyShip Pro system, you need to be added to the PitneyShip Pro AD Group for Single Sign-On first.

Go to RJ Advisor Access

Under Corporate Services, click on PitneyShip and submit the form to request approval for access.

Once this is approved, the Postal Advocate support team will be notified so they can add you to the system.

*Note: This process can take up to 48 hours.

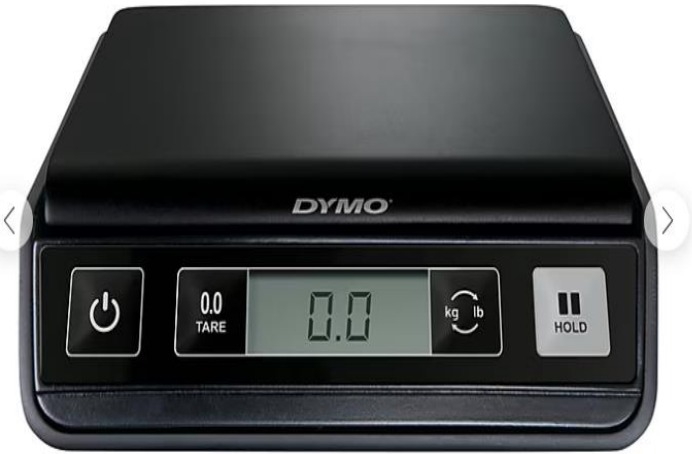


The screenshot displays the RJ Advisor Access portal interface. At the top, there is a navigation bar with tabs for MY CLIENTS, MY PRACTICE, MY INVESTMENTS, PLANNING, TRADING, and SUPPORT. Below the navigation bar, there is a 'FREQUENTLY VISITED' section with four tiles: SERVICE NOW - S..., EXPENSE MANA..., PEOPLEWORKS, and PEOPLESOFT. The main content area is divided into three columns. The first column is titled 'CORPORATE SERVICES' and contains a list of links: PitneyShip (highlighted with a yellow circle), Message Archive Portal, Associate Inquiry, and PeopleWorks. The second column is titled 'TECHNOLOGY SUPPORT' and contains links for Advisor Access Chrome – Getting Started, Advisor Access Chrome - Quick Reference, and AnswerNet. The third column is titled 'RJ RJNET RESOUR' and contains links for Corporate Servic and Department Ove Support Centers.

Ordering Supplies

How to Order Your Scale for PitneyShip Pro


Scales will be ordered through Guy Brown, the scale to order will be the Dymo Digital Postal Scale 5 lbs. (M5)



DYMO Digital Postal Scale 5 Lbs. (M5)
Item #: 897131 | Model #: 1772056
4.4 ★★★★★ 147 Reviews | 3 Questions

Purchased 9 times, last purchased on 12/20/23

\$37.99 Business price

 **Delivered FREE**

Deliver **tomorrow**. Order within 6 hrs 41 mins.

Quantity: 1

Ordering Supplies

Stamp Sheet Supplies

- To order stamp sheets, order through PeopleSoft Pitney Bowes Catalog

Postage Sheets for Stamp Printing, 6 sheets; 20 labels per sheet; 120 labels

Item #SL-SPM11

Postage Sheets for Stamp Printing - 6 sheets, 20 labels per sheet for a total of 120 labels - For...

✔ Contract

| | | | |
|------------------|----------|-----------------|------------------|
| Item ID | SL-SPM11 | Supplier | PITNEY BOWES INC |
| Supplier Item ID | | Supplier ID | 0000001052 |
| Lead Time | | Manufacturer | |
| Mfg Item ID | | Manufacturer ID | |
| Price | 3.49 | USD | |
| UOM | Each | | |

Quantity  **Add**  [Add to Favorites](#)  [Add to Template\(s\)](#)

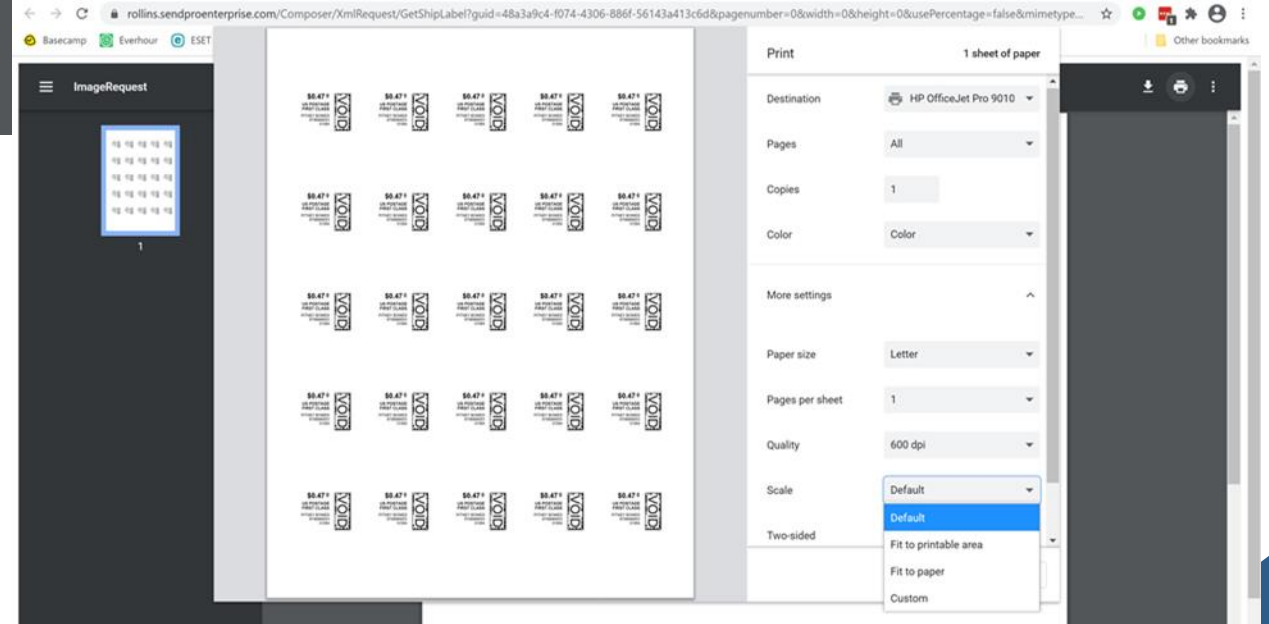
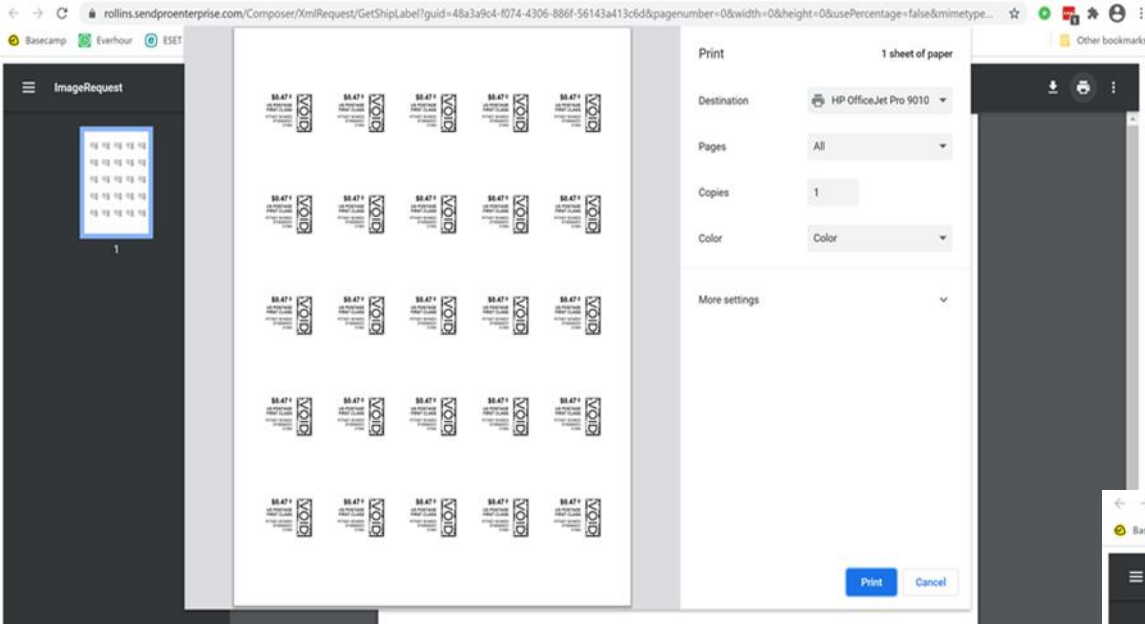
Returning Your Postage Meter

- Postal Advocate will submit the request to cancel your current postage meter.
- A return kit will be delivered to your location that includes withdrawal instructions (for any remaining funds on the meter), package and a return label.
- Remaining funds will be returned to the master postage account, and you will see a credit on your blotter shortly after.

How to Align the Printer Correctly to Print Stamps

Stamp Sheet Printer Alignment (Using Google Chrome – Recommended Browser)

When a user is doing a test print, in the printer dialog box, click the **MORE SETTINGS** down arrow. In the **SCALE** section in image 2, select **“Default”**. Put the test print page in and make sure the print lines up. Then hit **PRINT**.



- **Link to the Application - [link](#)**



ANY
QUESTIONS?

