

How to Create a Client Service Case

Upon Sign-in, one of the following screens will be displayed based on the number of products you have.

- 1 You will see one of the two screens below. Select **“Create a Support Case”**

The left screenshot shows the 'My Account' page for a user named John. It features several sections: 'BILLS & INVOICES', 'PROFILE MANAGEMENT', 'POSTAGE MANAGEMENT', 'SERVICE & SUPPORT', 'PURCHASE POWER®', 'ONLINE ORDERING', and 'REPORTING'. The 'Create a Support Case' button is highlighted in a red box in the 'SERVICE & SUPPORT' section.

The right screenshot shows the 'My Account' page for a user named Paige. It features a 'MY PRODUCTS' section with a table of products, an 'ORDER HISTORY' table, and a 'POSTAGE MANAGEMENT' section. The 'Create a Support Case' button is highlighted in a red box in the 'MY SUPPORT CASES' section.

Order#	Date	Value
2955185	08/29/2014	\$119.82
2153553	07/18/2013	\$111.79
1224851	06/13/2012	\$106.44

Postage Funding Account:	Value
Postage Funding Account:	44945848
Reserve Account Prepaid	\$0.00
Purchase Power® Available	\$0.00
Total postage funds	\$0.00

- 2 Make sure the correct account is selected.

- 3 If the account number is incorrect, click ‘change account’ and select the appropriate account from the ‘Select an Account’ dialog box.

The first screenshot shows the user's account information: Account PB DEMO (#0015558720) | change account, Address 37 EXECUTIVE DRIVE, DANBURY, CT / United States, 06810-4147. A red arrow points from the 'change account' link to the 'Select an Account' dialog box in the second screenshot.

The second screenshot shows the 'Select an Account' dialog box with a table of accounts:

Account	Location
<input type="radio"/> PB DEMO	37 EXECUTIVE DRIVE, DANBURY, CT / United States, 06810-4147

The third screenshot shows a form where the user enters the account number:

Refer to any Pitney Bowes statement or invoice and enter the account number to start.

Account Number

Enter account number

4 Select the 'client service' button below:

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Account PB DEMO (#0015558720) | change account Welcome John Smith (demo@mailinator.com) | sign out
Address 37 EXECUTIVE DRIVE, DANBURY, CT/ United States, 06810-4147

Knowledge Cases

Which of the following best describes your inquiry ?

4 **Client Service** : Select this if it's about your account (e.g. billing change of address etc.)
 Technical Support : Select this if it's about a technical problem with your equipment or software

Next

5 In the 'Description Information' section, provide more information about your client service case from the pull-down menu provided.

- Select the appropriate option under 'How can we help?'
- Additional information will be requested in the field, "This relates to" based on the option you selected in the "How can we help?" section. Select the most appropriate for this case.
- After completing the rest of the form, select "Submit".

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Account PB DEMO (#0015558720) | change account Welcome John Smith (demo@mailinator.com) | sign out
Address 37 EXECUTIVE DRIVE, DANBURY, CT/ United States, 06810-4147

Knowledge Cases

Case Edit
New Case

Case Edit Submit Save & Close Submit & Add Attachment Save & New Check Spelling Cancel

Case Information ! = Required Information

Account Name PB DEMO Priority Medium
Contact Name John Smith Status Open

Description Information 5

How can we help ? I have questions about a recent order
This relates to... --None--
Subject I have general questions about my account
Initial Details I have a question about a recent invoice
I would like to request a copy of my invoice
I would like to make a payment
I have questions about a recent order
I would like to make a change to my account
I would like online assistance
I need assistance refilling my meter
I would like to request a credit limit increase
I have a question about my maintenance contract
Something else

Additional Information

Invoice Number Purchase Order #

Submit Save & Close Submit & Add Attachment Save & New Check Spelling Cancel

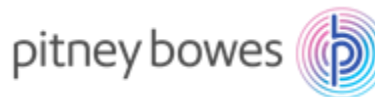
Your Case has been submitted and an email will be sent to confirm your case details.

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You can check on the status of your case – once it is resolved, the status will change from ‘open’ to ‘closed’.

The screenshot shows the Pitney Bowes Case Management interface. At the top, there is a navigation bar with the Pitney Bowes logo and a search icon. Below the navigation bar, there is a header section with account information: "Account PB DEMO (#0015558720) | change account" and "Welcome John Smith (demo@mailinator.com) | sign out". Below the header, there is a "Knowledge" tab and a "Cases" tab. The "Cases" tab is active, showing a case card for case number 04553193. The case card has a green checkmark and the text "Case has been submitted." Below the case card, there are links for "Case Comments (0)", "Attachments (0)", and "Articles (0)". The "Case Detail" section has "Edit" and "Close Case" buttons. The "Case Information" section shows "Account Name PB DEMO", "Contact Name John Smith", "Priority Medium", and "Status Open" (highlighted with a red box). The "Case Number" is 04553193. The "Description Information" section shows "How can we help? I have questions about a recent order", "This relates to... Supplies", "Subject Test - PLEASE DELETE", and "Initial Details Test - please delete". The "Additional Information" section shows "Invoice Number" and "Purchase Order #". The "System Information" section shows "Date/Time Opened 4/8/2016 5:39 AM" and "Date/Time Closed". There are "Edit" and "Close Case" buttons at the bottom of the case detail section.

Your Case has been created and an email will be sent to confirm your case details. See sample below:



From: Pitney Bowes Client Services
Subject: *Change to my account*

Hello John,
 You've successfully created a case with our Client Service team. Rest assured, we're looking into it and will continue to keep you updated. To help you track the progress of your case, we've created the following reference information:

Case Number: 0123456789

Subject: Change to my account

Once you're confident we've resolved the issue, we'll send a final confirmation email.

Questions? You can reach us by replying to this email (make sure you keep this code in the response 0123456789) or by updating your case using pitneybowes.com case management.

Through case management you could also access the knowledge base, view your Pitney Bowes account or see all the other ways to contact us.

We appreciate your patience and will be in touch soon.

Your Pitney Bowes Client Service Team