pitney bowes

Shipping & Mailing
Parcel & Packages

ParcelPoint™ Smart Lockers

Administration Guide

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1 - Managing Lockers

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Signing in to SendPro 360

You need to sign in in order to use the system.

Note: If your organization uses Single Sign-On (SSO), your sign-in procedures may vary.

1. *Go to the SendPro 360 website*.
2. Enter your email address and password.
3. Select **Sign In**.
4. If your organization uses multi-factor authentication, a verification code will be sent to the last method you used (email or SMS). To use a different method, select the drop-down arrow and choose the other method.
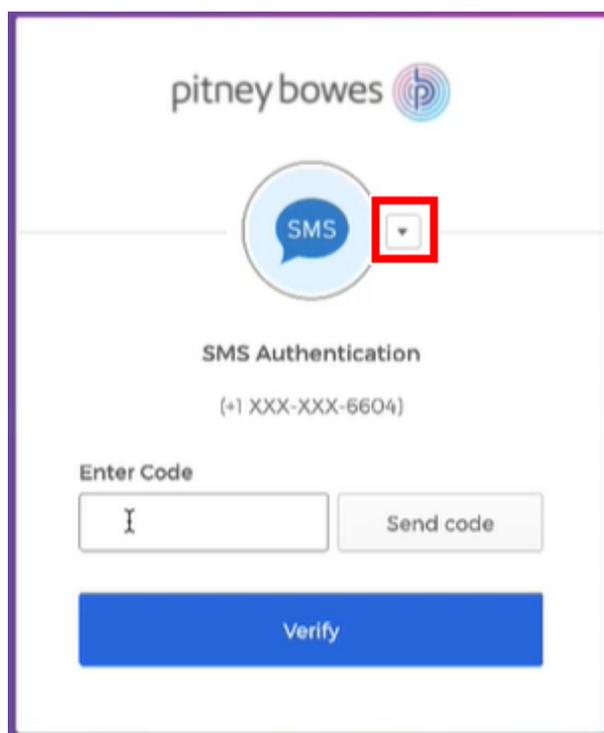
5. Enter the code you receive and select **Verify**.

Checking locker availability

You can use the Locker Management Module to see which lockers are available, reserved, occupied, expired, and out of service.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Lockers > Manage Lockers**.
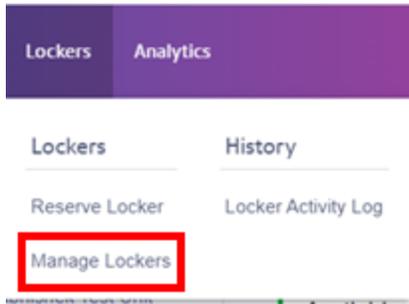
2. Choose your location from the **Location** menu, then choose your locker bank from the **Locker Bank** menu.
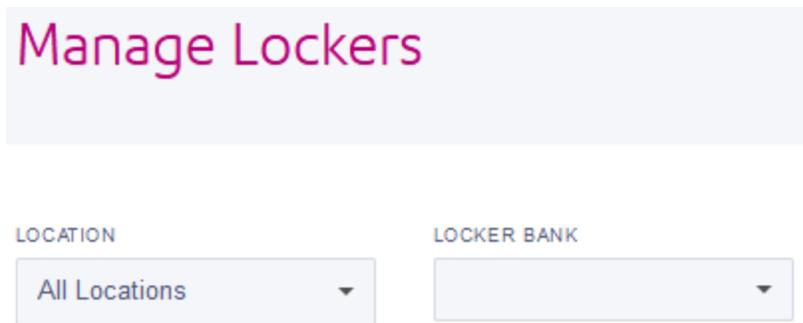
    The number of lockers that are available, reserved, occupied, expired, and out of service is displayed.

Reserving a locker

You can reserve a locker ahead of time using Locker Management Module so that an assigned locker is available for a specific package as soon as you or a designated client sign in at the kiosk. If you use SendSuite Tracking Online, you can also use that application to reserve a locker.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Lockers > Reserve Locker**.
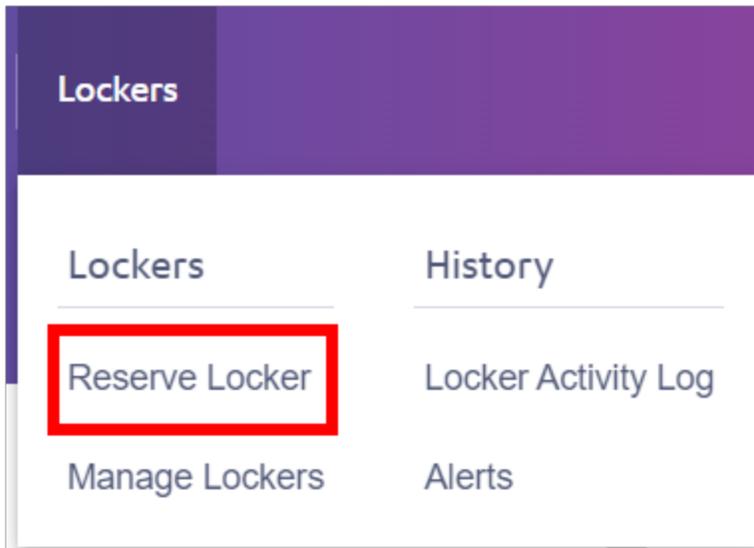
2. Select **Deliver**.
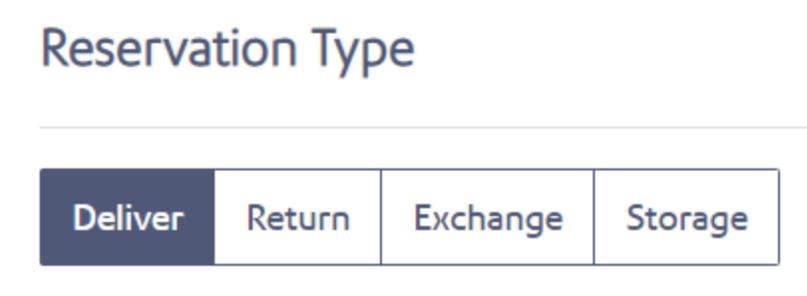
3. Enter the **Package Details**.

Package Details

TRACKING ID ❓

PACKAGE TYPE:

⦿ Personal   ◌ Department

RECIPIENT *(optional)*

Type to search (Please enter 3 or more characters)

a. Scan or enter the ID in the **Tracking ID** field. This may be defined by the customer, the company, or the tracking number of the carrier.

b. Under Package Type, select **Personal**.

c. In the **Recipient** field, start typing the name of the recipient.
   - The recipient must already be in the system's contact list.
   - Once you enter the first 3 letters of the recipient's name, the system displays all of the names and addresses beginning with those letters.
   - Select the recipient.

4. Enter the **Locker Details**.

Locker Details

LOCATION

Shelton Office ▼

LOCKER BANK

Select ▼

LOCKER SIZE

Select ▼

LOCKER RESERVATION END TIME

Select reservation end time

☐ Requires Accessible Locker

a. Select your location from the **Location** menu.
b. If you need a wheelchair-accessible locker (15" to 48" from the floor), select **Requires Accessible Locker**.
c. From the **Locker Bank** menu, select the locker bank. Only locker banks assigned to you are shown.
d. From the **Locker Size** menu, select small, medium or large.

5. Select **Reserve**.
    - If the recipient already has a reserved locker, you are prompted to either add the new package to the existing locker or select a new locker.
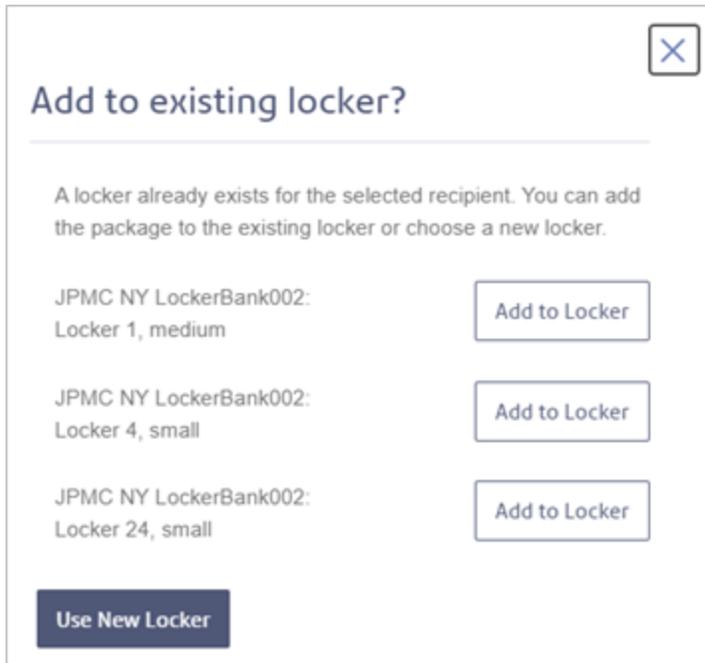
Removing a locker from service

You can remove a locker from service so that it is no longer available for reservation.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Lockers > Manage Lockers**.

2. Choose your location from the **Location** menu, then choose your locker bank from the **Locker Bank** menu.

All of the lockers in the selected locker bank are shown.

3. Select the locker you want to remove from service.

4. Select **Remove from service**. The locker status changes to Out of service.

Opening a locker remotely

If a recipient is unable to open a locker door, you can open it remotely using the Locker Management Module.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.
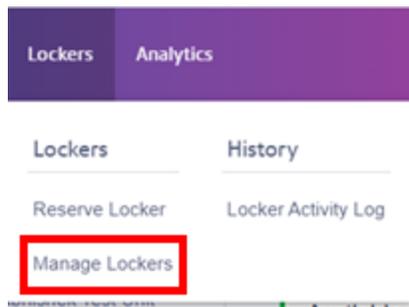
1. Select **Lockers > Manage Lockers**.

2. Choose your location from the **Location** menu, then choose your locker bank from the **Locker Bank** menu.

All of the lockers in the selected locker bank are shown.

3. Select the **All Lockers** menu and choose **Reserved**.

4. Select the locker you want to open. To open all of the reserved lockers, check the **Select All** box.
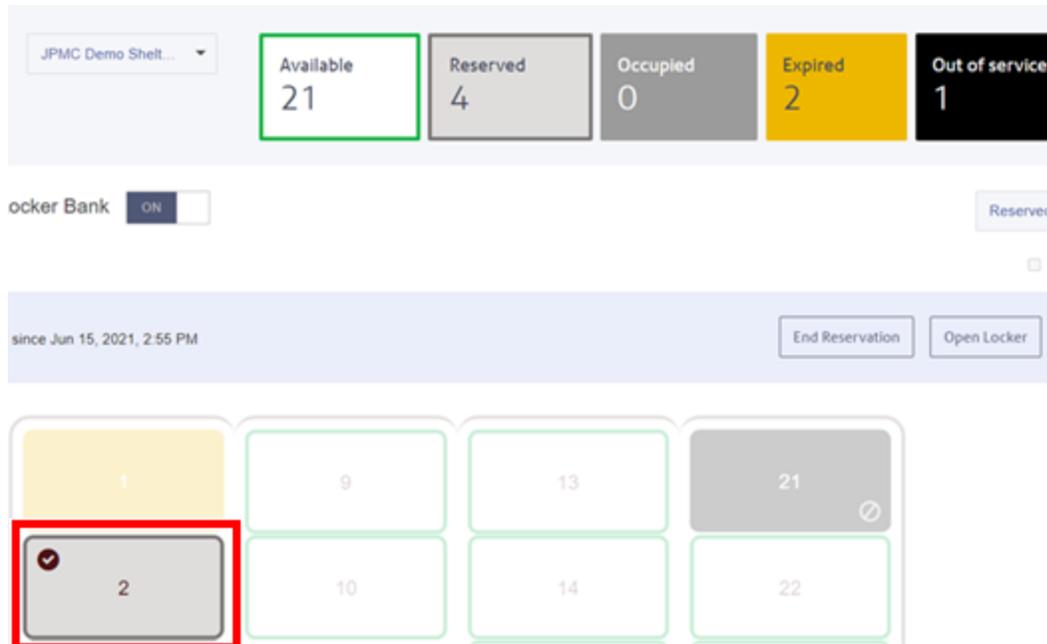
5. Select **Open Locker** to open the selected locker door.

Placing a locker back in service

If a locker is currently out of service, you can place it back in service to make it available for reservation and drop-off.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Lockers > Manage Lockers**.
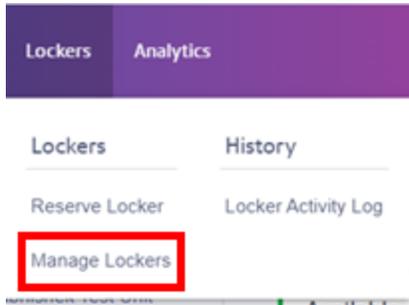
2. Choose your location from the **Location** menu, then choose your locker bank from the **Locker Bank** menu.
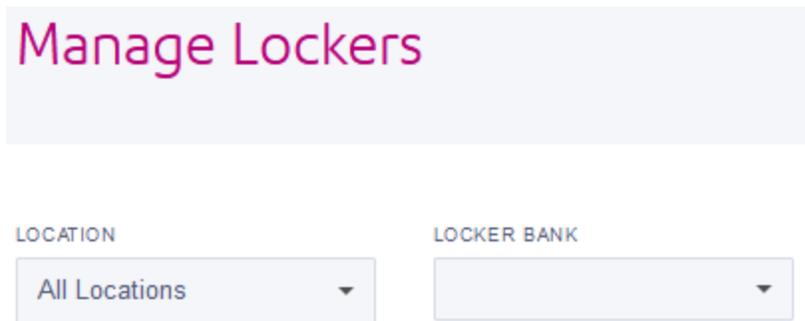
    All of the lockers in the selected locker bank are shown.
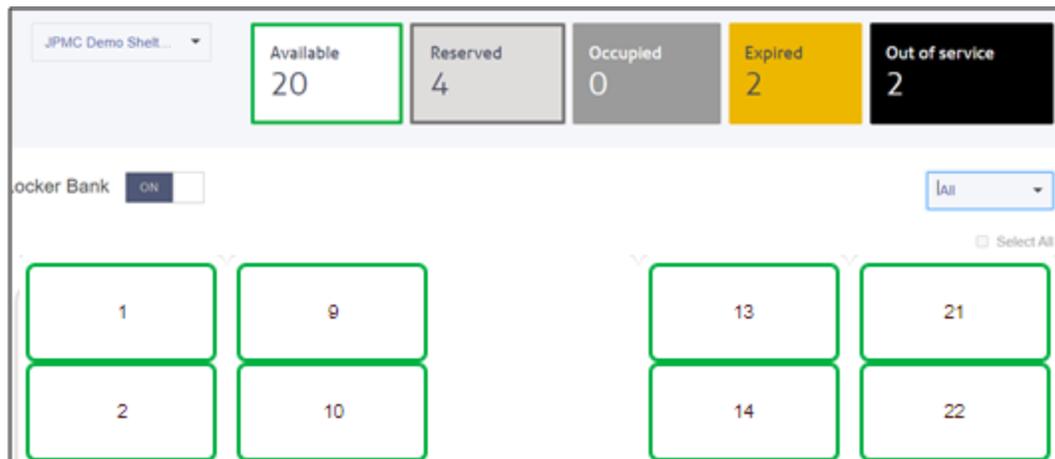
3. Select the **All Lockers** menu and choose **Out of Service**.
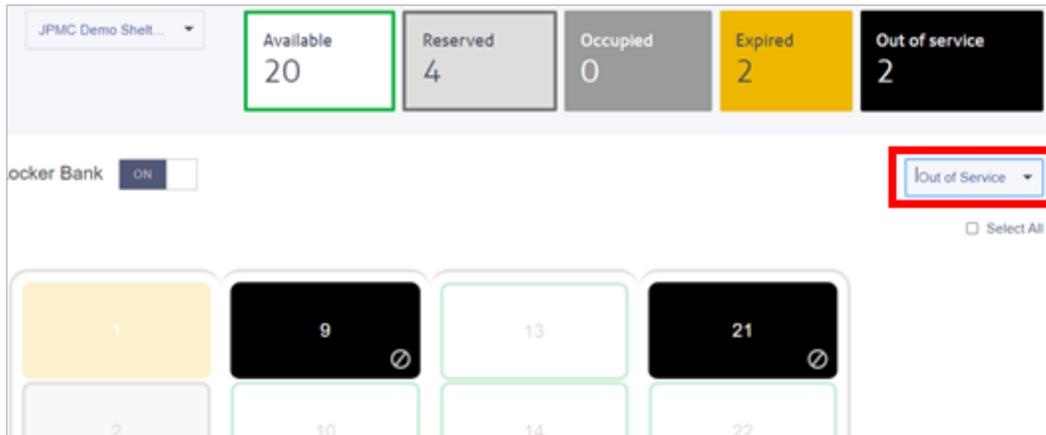
4. Select the locker you wish to place back in service, or check the **Select All** box to select all out of service lockers.
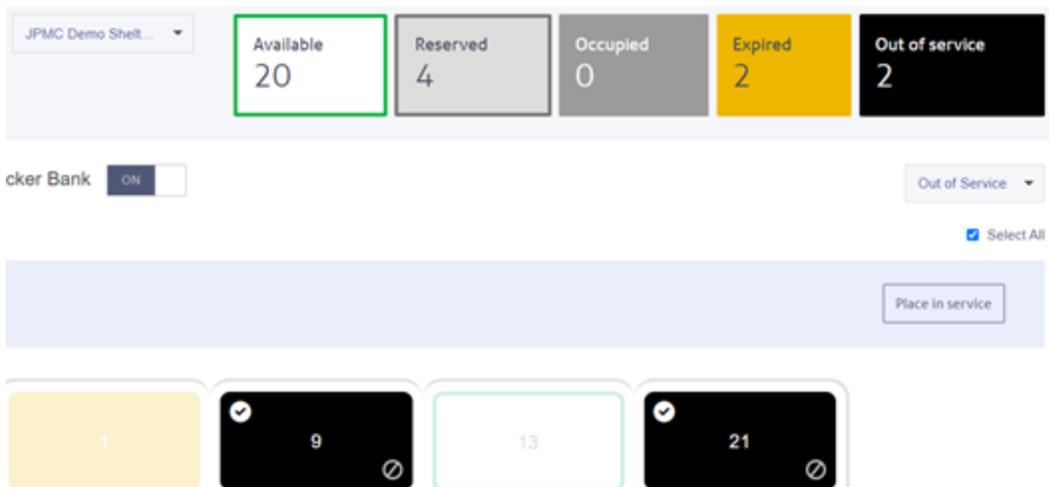
5. Select **Place in service**.
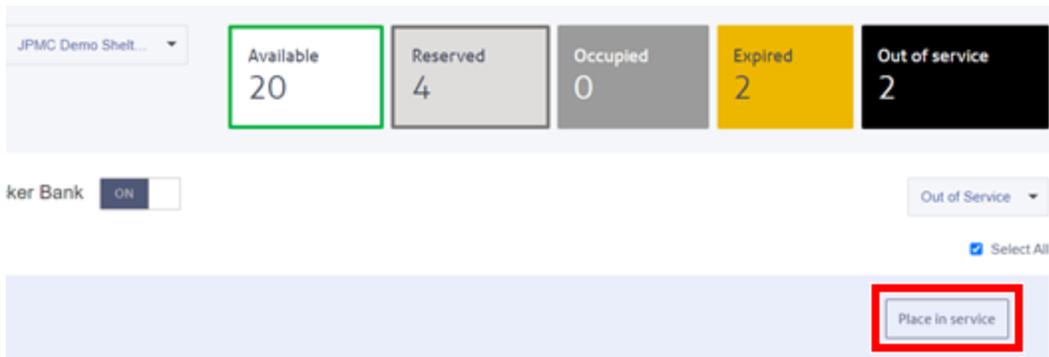
Viewing locker and package activity

You can view the package and locker details for all of the locker banks available to you. These include the recipient name, locker bank location, tracking ID, and status.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Lockers > Locker Activity Log**.

2. Use the filters to filter the transactions as needed:
   - To filter by date, select **Select date**.
   - To filter by location, select **Locations**.
   - To filter by locker bank within a location, select **Locker Bank**.
   - To filter by locker or package status, select **Status**.
   - Enter a tracking ID in the search field, or click on **Tracking ID** to search by Recipient or Locker number.

3. To view the details of an item, click the arrow next to it. You can see a photo of the package, the recipient, the recipient's photo, and package details like the pickup code. Click on **Recipient Photo** to enlarge the photo.

An image of the recipient's signature is also provided.

Configuring locker kiosks - general settings

You can set up how clients interact with the kiosks within a locker bank when they pick up and drop off packages.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Kiosks**.

2. Select the location from the **Location** menu, then select the locker bank from the **Locker Banks** menu.
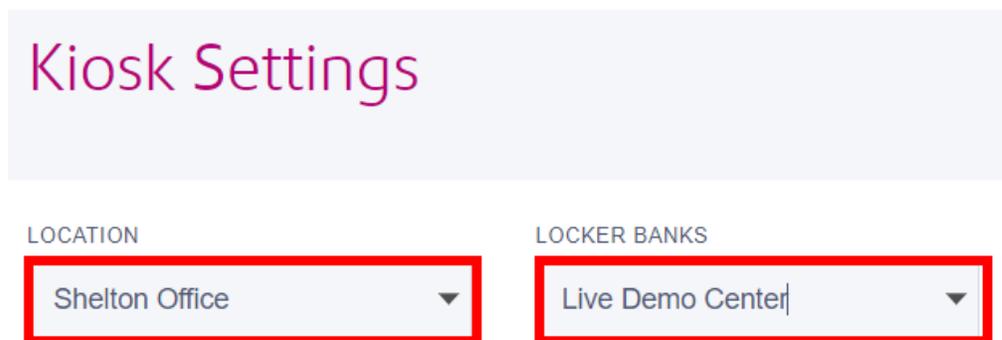
3. By default, the General settings tab will be displayed. Select the Locker Bank functionality option you want for the locker bank.
    - Deliver Packages - authorized users can deliver packages to lockers
    - Deliver Packages & Store Belongings - allows users to store their belongings in a locker temporarily. Refer to *Configuring locker kiosks - day lockers* for instructions.

4. Set the slider for each option to **ON** to enable the option or **OFF** to disable the option.
    *   **Contactless Lockers**: Set to **On** to enable clients to scan barcodes instead of typing credentials into the kiosk.
    *   **One Time PIN**: Set to **On** to enable the Return and Exchange work flows.
    *   **One Time PIN Expiration**: Set the amount of time a client has to drop off an item at the locker for return or exchange after receiving a request.
    *   **Reopen Locker**: Set the amount of time a client has to reopen a locker after closing the door. Click **Save** after setting the time limit.
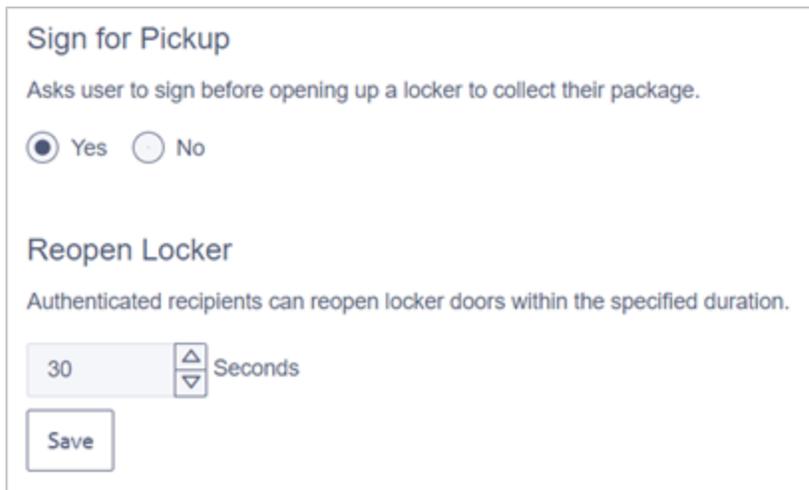
*   **Reservation without Recipient**: Set to **On** to enable clients to reserve a locker to store personal items.

Configuring locker kiosks - drop off settings

You can set up how clients interact with the kiosks within a locker bank when they drop off packages.
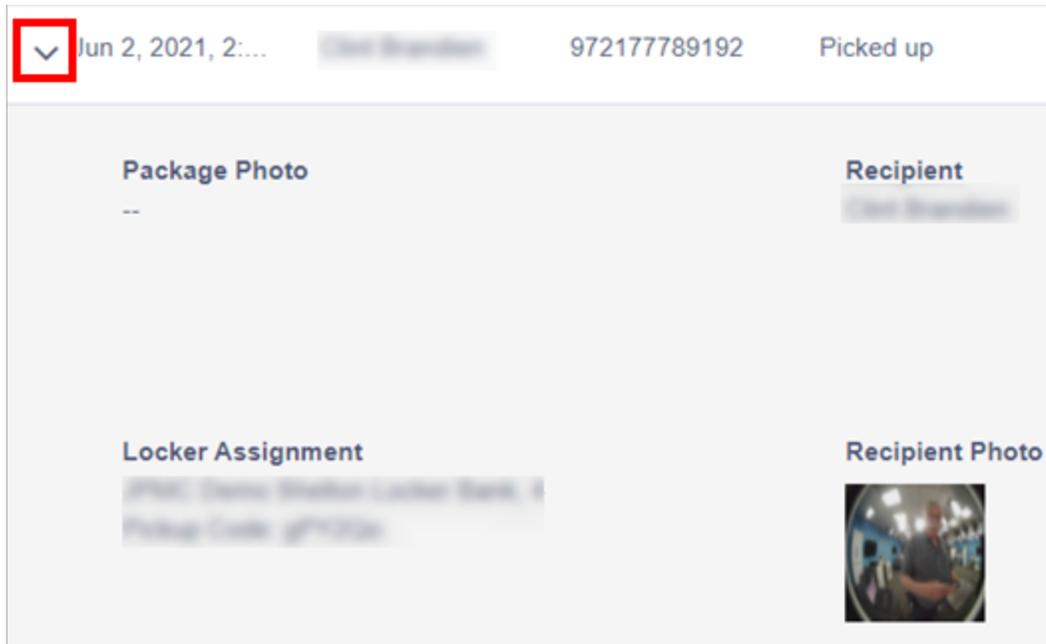
The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.
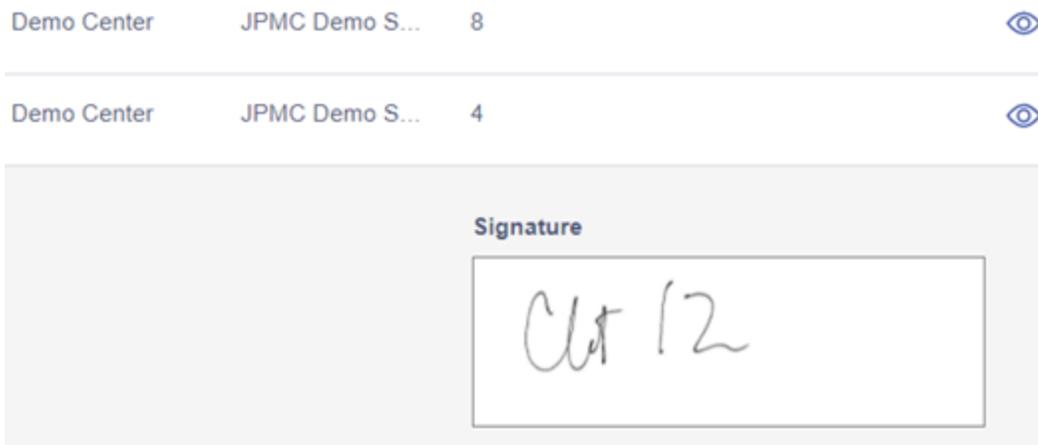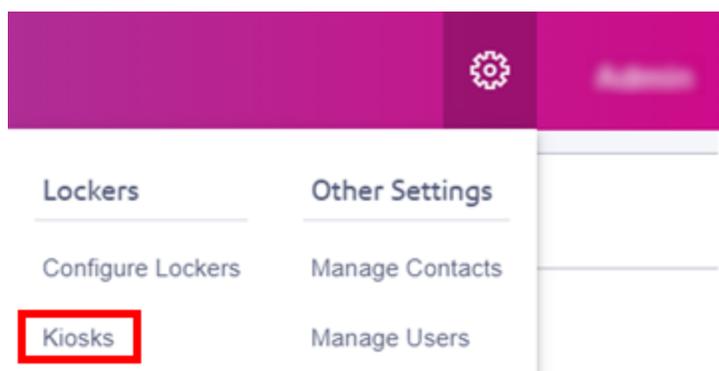
1. Select **Settings > Kiosks**.
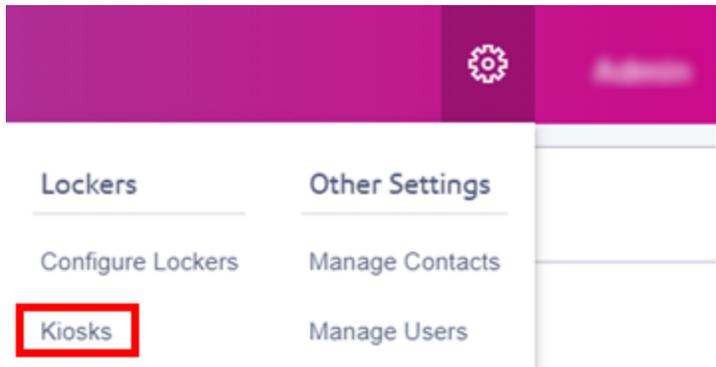
2. Select the location from the **Location** menu, then select the locker bank from the **Locker Banks** menu.
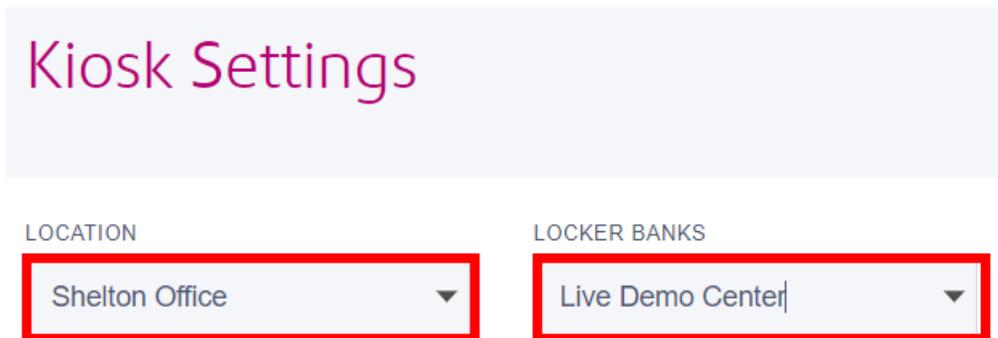
3. Select **Package Drop Off**.

4. Set the slider for each option to **ON** to enable the option or **OFF** to disable the option.
   - **Package with no barcode**: Set this to **ON** if you want the kiosk to take a picture of a package that does not have a barcode.
   - **Set Expiration**: Select the amount of time (days) that can elapse before a locker operator can remove all or some of the packages not retrieved by a client.
   - **Categorize Department Mail From Personal Mail**: Set this to **ON** if you want the locker operator to be able to assign lockers to departments.
   - **Reservation without Recipient**: Set this to **ON** if you want to be able to make a reservation at the kiosk.

Configuring locker kiosks - pick up settings

You can set up how clients interact with the kiosks within a locker bank when they pick up packages.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Kiosks**.
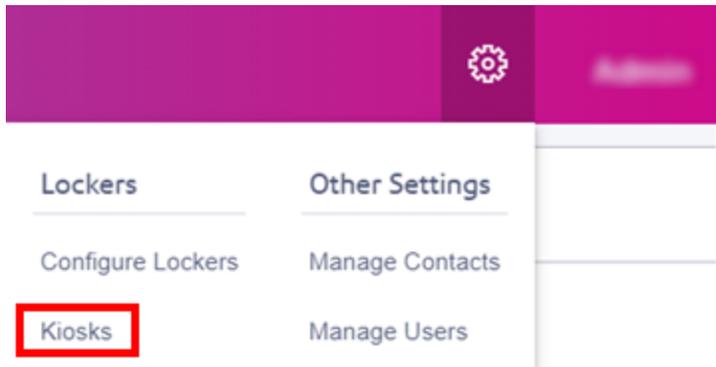
2. Select the location from the **Location** menu, then select the locker bank from the **Locker Banks** menu.
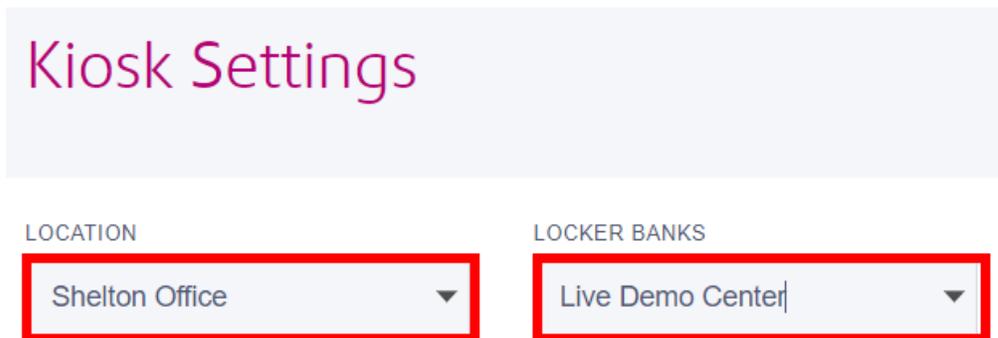
3. Select **Package Pick up**.

4. Set the slider for each option to **ON** to enable the option or **OFF** to disable the option.
    - **Capture Recipient Photo:** Set to **On** to have the kiosk take a picture of clients when they scan their barcode or enter their pickup code.
    - **Department Mail Pickup:** Set to **On** to allow clients to retrieve packages from lockers assigned to a department.
    - **Multiple Packages:** If a client has packages in multiple lockers, set this to **On** to open all the lockers at the same time. Otherwise, each locker opens one at a time.
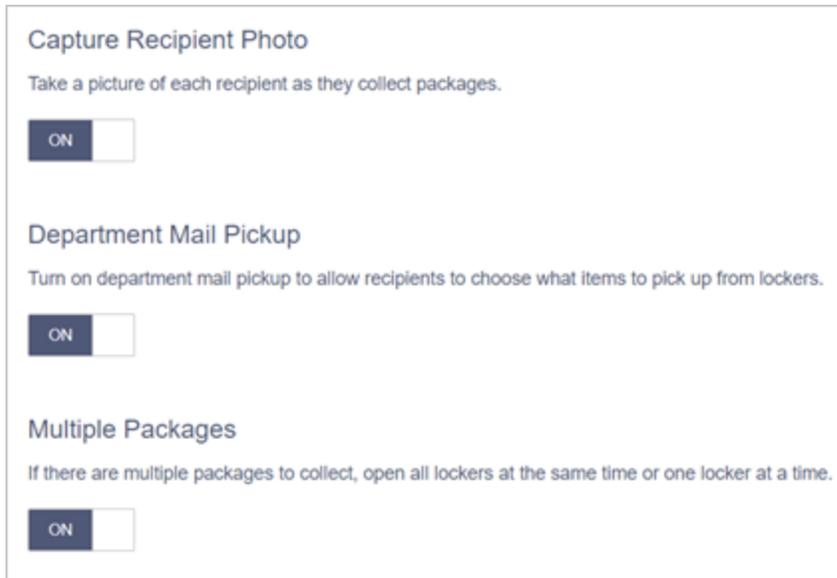
    Capture Recipient Photo

    Take a picture of each recipient as they collect packages.

    ON

    Department Mail Pickup

    Turn on department mail pickup to allow recipients to choose what items to pick up from lockers.

    ON

    Multiple Packages

    If there are multiple packages to collect, open all lockers at the same time or one locker at a time.

    ON

    - **Sign for Pickup**: Select **Yes** if you want to require the client to sign for the package before retrieving it from a locker.

Configuring locker kiosks - day lockers

You can set up kiosks within a locker bank to allow clients to store personal belongings for either a fixed amount of time that you set, or a flexible duration set by the client up to a maximum that you set. You have the option of reserving some lockers of each size for delivery only to ensure that all available lockers are not used for personal storage.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Kiosks**.
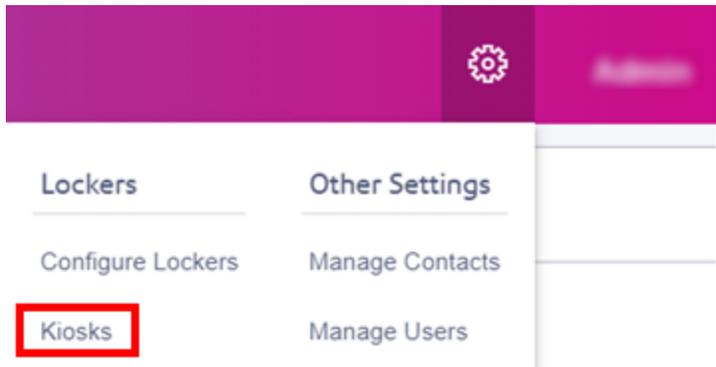
2. Select the location from the **Location** menu, then select the locker bank from the **Locker Banks** menu.
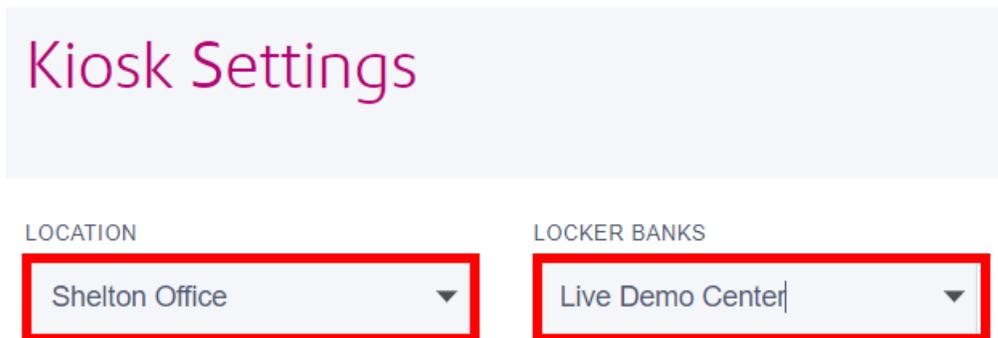
3. By default, the General settings tab will be displayed. Select **Deliver Packages & Store Belongings**.

a. (Optional) Use the sliders to reserve some lockers of each size for delivery only,

b. Select **Save**.

4. Select **Day Locker**.

5. Set the **Reservation End Time**.
   - **Fixed** - All reservations will end at the time you set.

Reservation End Time (Time Period)

Choose to make day lockers available round the clock or end all locker reservations at a fixed time.

◉ Fixed   ◯ Flexible

END RESERVATION DAILY AT

06 : 30   PM

Save

   a. Use the scroll arrows to set the hour and minute.
   b. Select PM or AM
   c. Select Save.

- **Flexible** - Users can set and extend their own end time up to the maximum you set.

Creating a barcode for contactless login

Instead of a typing in a user name and password, users can scan a barcode to log into a locker bank. You must enable Contactless Lockers in the settings for each locker bank you want to be contactless.

Enable Contactless Lockers for a locker bank

1. Click the **Settings** icon at the top and select **Kiosks**.
2. Select the **Location** and **Locker Bank**.

3. Under **Contactless Lockers**, set the toggle switch to **On**.
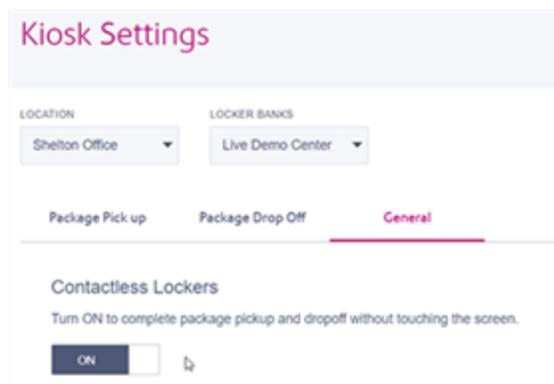
Generate the barcode

1. Click the **Settings** icon at the top and select **Manage Users**.
2. Click **User Badges**.
3. Click **Add User Badge** or **Import**.

Add individual users

1. Click **Add**.
2. Enter the user's **Email Address**. This must be a pre-existing user in the enterprise.
3. (Optional) Enter a **Badge ID**. If you don't enter an ID, the system will generate one.
4. (Optional) Enter a **Personal ID**.
5. Click **Save**.

Import a list of users

You can import a list of users in a CSV file. Download the template to set up your list in the correct format.

1. Click **Import**.
2. Click **Choose File**.
3. Navigate to the CSV file containing the list of users.
4. Click **Import**.

Print the barcode

1. Click the **Print** icon for the barcode you want to print.
2. Click **Print** in the Print User Badge dialog box.

Related topics:

- *Dropping off a package using contactless login*

Running a receiving report

Run a receiving report in PitneyAnalytics to view current or recent locker utilization across the enterprise.

1. Select **Analytics > Reports**.
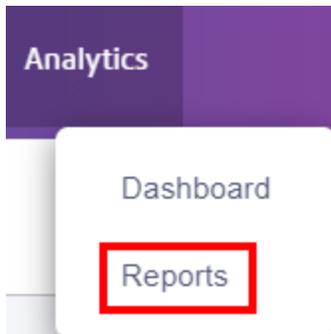
2. Select the **Receiving** tab.
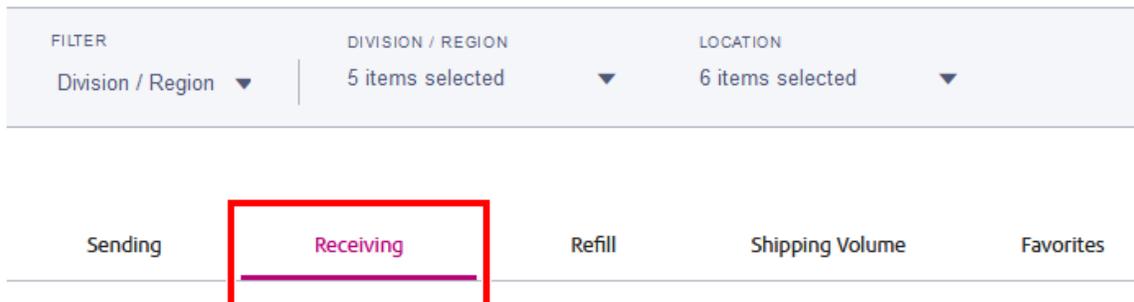
3. Use the filters to select the data you wish to view.
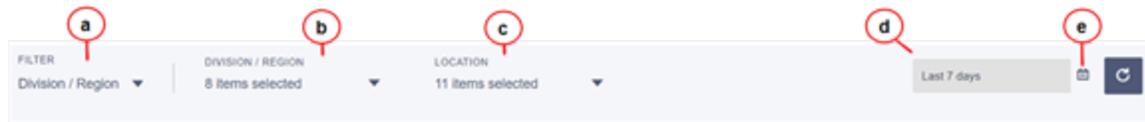
a. **Filter:** The default value is Division/Region. Do not change this setting as it represents the entire enterprise (all divisions and all locker locations).

b. **Division/Region:** Select the divisions you wish to view.

c. **Location:** Select the locker locations you wish to view.

d. **Date Range:** Select one of the preset time periods, or select **Custom Range** to enter a specific date range.

e. **Refresh:** Once you have selected all of your options, click on the refresh icon to display the analysis.

4. Use the tabs in the lower section to select how you want to display the information.
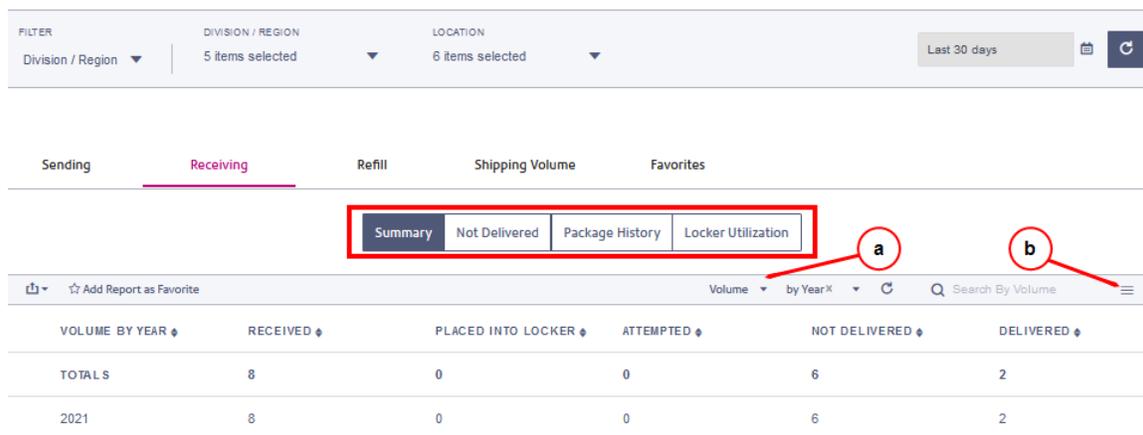
5. Select and arrange the data you want to view. If you select different options, click on the refresh icon to update the report.

a. Select **View by** to change the sort column.
b. Select the **Show/Hide Columns** button to select which columns are visible in the report. If you change the visible columns, click **Save**.
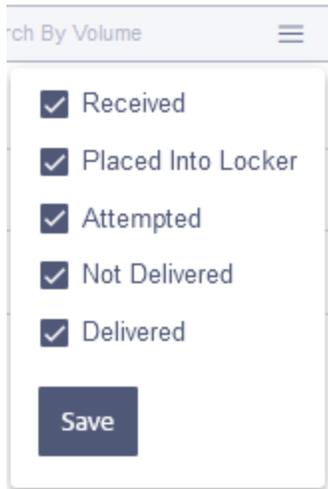
6. Use the search box to search the report.

7. Click the **Export** button to export the report to either a CSV or Excel file.
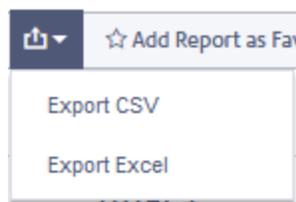
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2 - Managing Users, Roles and Departments

In this section

Viewing users

You can view all of the users in the system or search for individual users or groups of users.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Users**.
2. To filter the list, select the **All Users** menu.

3. To search for an individual user or group of users, type the first few letters of the name in the search field.
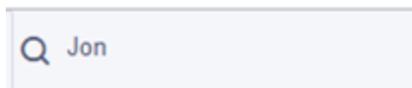
Related topics

- *Adding a user*
- *Editing a user*
- *Deleting a user*

Adding a user

You can add users to the system as needed. Before adding the user, make sure that the role you wish the user to have has already been defined.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Users**.
2. Select **+Add User**.

3. Enter the user's name and email address.

4. Select the **Admin Access Level** you want the user to have.
   - **None:** No access
   - **Enterprise:** All divisions and locations
   - **Division:** Access to one or more divisions within the enterprise
   - **Location:** Access to one or more locations within a division

5. Select the **Analytic Access Level** you want the user to have. (PitneyAnalytics only)
6. Select the user's role from the **Assign Roles** menu. The role defines the tasks the user is allowed to perform.
7. Select the user's location from the **Select Location** menu.
8. Select the **Carrier Accounts** the user will have access to. (Sending/PitneyShip Pro only)
9. Select the user's **Default Carrier Account(s)**. (Sending/PitneyShip Pro only)
10. Select the **Cost Accounts** the user will be allowed to use. (Sending/PitneyShip Pro and ParcelPoint Smart Lockers only)
11. Select the **Default Cost Account** for the user. (Sending/PitneyShip Pro and ParcelPoint Smart Lockers only)
12. Select **Save and Close**.
    The user will receive a welcome email message.

To resend an invitation, select the **Resend Email** icon next to the user.

C

Related topics

- *Viewing users*
- *Adding a role*

Editing a user

You can edit users if you need to change their name, role, or permissions.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Users**.
2. Select the **Edit User** icon next to the user you wish to edit.

3. Change the user's information as needed.
4. Select **Save and Close**.

Deleting a user

If a user account is no longer needed, you can delete it.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Users**.
2. Select the **Delete User** icon next to the user you wish to delete.

3. Select **Delete**.

Managing Users, Roles and Departments

Adding a role

You can create different roles to define the tasks that users are allowed to perform. Each user is assigned a role.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. From the Home screen, select the **Get Started** tab.
2. Select the **Manage** button under **Roles**.
3. To create a new role, select **+ Add Subscription Role**.
   OR
   To copy and edit an existing role, select the **Duplicate Subscription Role** icon next to it.

4. Enter a **Display Name** for the role.

   Note: Admin and User are pre-defined system default roles and cannot be edited.
5. (Optional) Select a **Role Templates Feature Filter** on which to base this role.

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6. Select the **Features** you want users with this role to be able to perform. Scroll down to see all features. Scroll to the right to see all of the feature categories.
7. Select **Save and Close**.

Editing a role

If you need to change the name or features of a subscription role, you can edit it.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. From the Home screen, select the **Get Started** tab.
2. Select the **Manage** button under **Roles**.
3. Select the **Edit** icon next to the role you wish to edit.

   🖉

4. Make the needed changes.
5. Select **Save and Close**.

Deleting a role

If you no longer need a role, you can delete it.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. From the Home screen, select the **Get Started** tab.
2. Select the **Manage** button under **Roles**.
3. Select the **Delete** icon next to the role you wish to delete.

   🗑

   Note: You cannot delete your own role, so the delete icon will not be present next to roles that are assigned to you. Instead there will be a **View** icon so that you can view the role's settings.

4. When prompted to confirm that you want to delete the role, select **OK**.

Adding a department

A department is a group of recipients for whom packages can be received and delivered. Each department can have a "key contact" who receives or picks up the department's packages. Departments are used with Receiving and the Locker Management Module.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select the **Departments** tab.
3. Select **+ Add Department**.
4. Enter the **Department Name**.
5. (Optional) Choose a location.
6. Select **Save and Add Recipient**.
7. Select the boxes next to each recipient you want to add to this department.
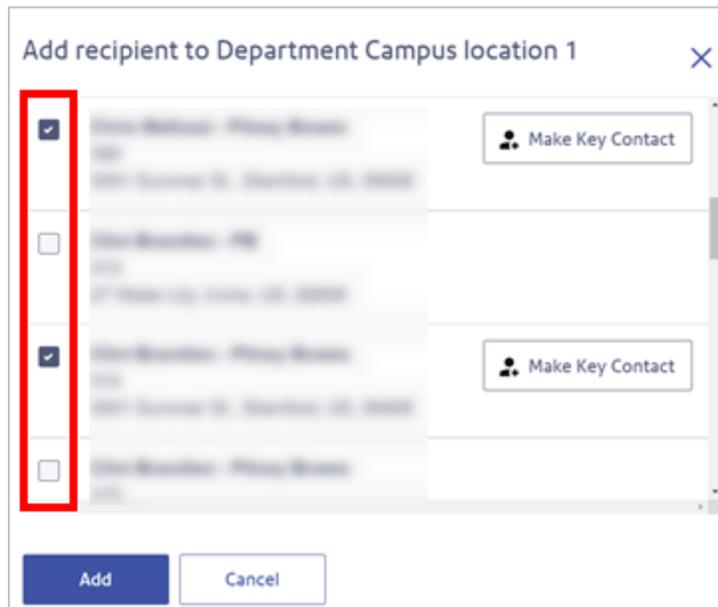
8. To designate one of the recipients as a key contact, select the **Make Key Contact** button next to that recipient.
9. When finished adding recipients, select **Add**.

Editing a department

You can update the recipients in a department or change the key contact.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select the **Departments** tab.
3. Select the **Edit** icon next to the department you wish to edit.

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4. Update the department recipients as needed.
   - To remove a recipient, uncheck the box next to their name.
   - To add a recipient, check the box next to their name.
   - To designate a new key contact, select **Make Key Contact** next to their name.

5. Select **Save**.

Deleting a department

If you no longer need a department in the system, you can delete it.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select the **Departments** tab.

3. Select the **Delete** icon next to the department you wish to delete.

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4. Click **Confirm** to delete the department.

Adding a contact

You can add new contacts to SendPro 360.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select **+ Add Contact**.
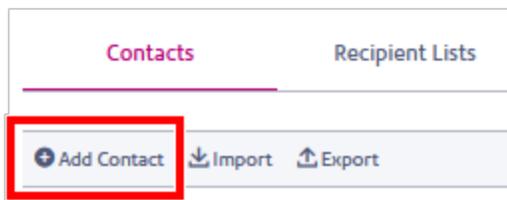
3. Select **Recipient** or **Sender**.
4. Enter the contact information.
5. Select **Add internal delivery details** and add the recipient's internal delivery information. (Receiving/PitneyTrack Inbound only)
   Note: If Add internal delivery details is checked, then Private will not be available. Internal delivery information can only be added for shared contacts.
6. Select **Notify all internal deliveries** to ensure that the recipient is notified via email of their internal deliveries. (Receiving/PitneyTrack Inbound only)
7. Select **Accessibility accommodations** if the contact needs an accessible locker. (ParcelPoint Smart Lockers only)
8. By default, addresses are shared with all users in your enterprise. If you do not want the address to be shared, select the **Private** box.
   Note: If Private is checked, then Add internal delivery details will not be available.
9. Select **Save and Close**.

Adding additional address types (Optional)

If needed, you can add additional address types for this contact. Additional address types apply to this contact only; address types added for one contact will not be visible for other contacts.

1. Select **Add Address**. (You may need to scroll down to see it.)

2. Change the **Address Label** as needed to indicate the address type. The label you enter will become the name of the tab for that address.

3. Enter the address information for the contact.

4. Select **Save and Close**.

5. To remove an address, select its tab, then select **Remove Address**.

Related topics

- *Importing contacts*

Importing contacts

You can import contacts into the system by uploading a CSV file. If you use Receiving, see the *Importing for Receiving* section below before you begin.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select **Import**.
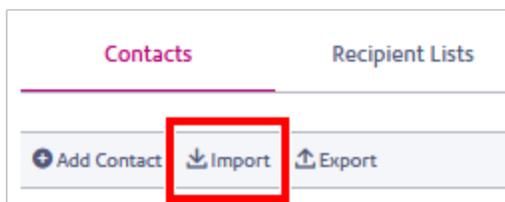
3. (Optional) To download a template that you can use to create your address file, click on the **Download a .csv template** link.
4. Select **Choose File** and select your address file in CSV format.
5. Select the sharing options for the addresses you're importing:
    - To replace the current shared addresses with the addresses in your CSV file, select **Replace shared contacts with my imported contacts**.
    - To replace your current private (unshared) addresses with the addresses in your CSV file, select **Replace my unshared addresses with imported addresses**.
    - To share the imported addresses in your CSV file with all users in your enterprise, select **Share imported addresses with all users**. **Important:** If you use Receiving, you must select this. If you do not, the addresses will be imported as private and you will not be able to share them.
6. Select **Continue**.

7. In the Import Contacts window, match your CSV file fields in the **Your CSV Fields** column with the SendPro 360 fields in the **Address Book Fields** column.

8. Select **Import**.

Importing for Receiving

If you are importing contacts for Receiving:

- Make sure that **Share imported addresses with all users** is selected. If it is not, the addresses will be imported as private and you will not be able to share them.
- Make sure that the InternalDelivery column in the CSV file is set to TRUE. This checks the **Add internal delivery details** box for the contact.
- Make sure that the NotificationAll column in the CSV file is set to TRUE. This checks the **Notify all internal deliveries** box for the contact.

Editing a contact

You can edit contact information as needed.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select the **Edit** icon next to the contact you wish to edit.

3. Update the contact information as needed.
4. Select **Save and Close**.

Deleting a contact

If you no longer need a contact in the system, you can delete it.

The features and options you see may vary depending upon your role and subscription. If you have any questions regarding your permissions, please contact your administrator.

1. Select **Settings > Manage Contacts**.
2. Select the **Delete Contact** icon next to the contact you wish to delete.

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    OR

    To delete multiple contacts at once, select the boxes next to the contacts you wish to delete,
    then select **Remove Selected**.

3. Select **Delete** to confirm.

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