

# **Intelligent Mail® Symposium**

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## **Getting Started with Intelligent Mail**

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## Getting Started with Intelligent Mail

Step 1 – Review the Guides and Specifications

Step 2 – Plan Barcodes, Electronic Documentation & Feedback

Step 3 – Setting up your profile / The Business Customer Gateway

Step 4 – Validate Barcodes

Step 5 – Test Environment for Mailers (TEM)

Step 6 – Finalize Feedback

Step 7 –

Step 8 –

## Review the Guides ...

- *A Resource Map to Intelligent Mail® Documents*
- *A Guide to Intelligent Mail for Letters and Flats*
- *User Access to Electronic Mailing Information and Reports Guide*
- *A Guide to Customer/Supplier Agreements*

## ... and Specifications

- *Postal Service™ Mail.dat® Technical Specification*
- *Postal Service Mail.XML® Technical Specification*
- *Intelligent Mail® Barcode Specification (USPS-B-3200)*
- *Pure 24-digit Intelligent Mail Tray Label Specification (USPS-B-3216)*
- *Intelligent Mail Container Barcode Specification (USPS-B-3215)*

## Plan Barcodes

- Mailer ID (MID)
- Service Type Identifier
- Unique Numbering
- Barcode Types
  - IMb™, mailpiece barcode
  - IM™ tray label
  - IM container label

## Plan Electronic Documentation

- Postal Wizard
  - Discuss Full-Service ACS™ with Business Mail Entry
  - Understand options for obtaining Full-Service ACS
- Mail.dat®
  - Ranging, Unique Numbering, Nesting
  - Mail Owner / Mail Preparer identification in the By/For
- Mail.XML®
  - November 2009

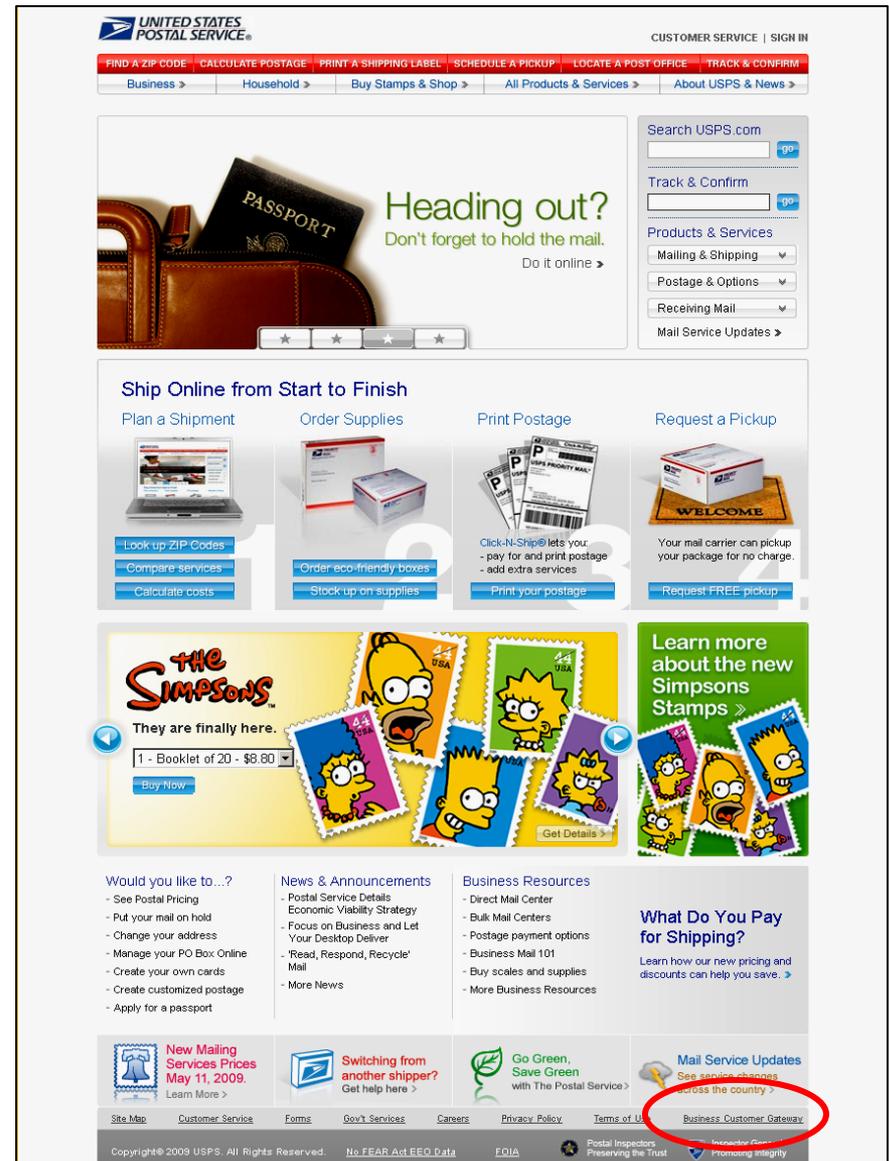
## Plan Feedback

- Full-Service ACS™- Change of Address (COA) and Nixie
  - Does the mail owner want Full-Service ACS?
  - Do you want to designate a third party?
    - ✓ If yes, third party MID is required
    - ✓ Profile
  - Determine how you want the data provided
    - ✓ Online downloadable reports
    - ✓ Mail.XML® pull
    - ✓ Mail.XML push

## Plan Feedback

- Start-the-Clock and Container Visibility
  - o Does the mail owner want Start-the-Clock information?
  - o Does the mail preparer want Start-the Clock information?
  - o Do you want to designate a third party?
    - ✓ If yes, third party MID is required
    - ✓ Profile
  - o Determine how you want the data provided
    - ✓ Online downloadable reports
    - ✓ Mail.XML pull
    - ✓ Mail.XML push

- Use the Business Customer Gateway to set up your profile
- Access the Gateway from from <http://www.usps.com>.
- New interface to all U.S. Postal Service Business Services
- Gateway is available for ALL business customers – large or small
- Centralized access to services under the Intelligent Mail Full-Service and Basic options



The screenshot shows the USPS website interface. At the top, there is a navigation bar with links for 'FIND A ZIP CODE', 'CALCULATE POSTAGE', 'PRINT A SHIPPING LABEL', 'SCHEDULE A PICKUP', 'LOCATE A POST OFFICE', and 'TRACK & CONFIRM'. Below this is a secondary navigation bar with 'Business', 'Household', 'Buy Stamps & Shop', 'All Products & Services', and 'About USPS & News'.

The main content area features a promotional banner for 'Heading out?' with a passport in a bag and the text 'Don't forget to hold the mail. Do it online >'. To the right is a search bar and a 'Track & Confirm' section.

Below the banner is a section titled 'Ship Online from Start to Finish' with four sub-sections: 'Plan a Shipment', 'Order Supplies', 'Print Postage', and 'Request a Pickup'. Each sub-section has a corresponding image and a 'Buy Now' button.

There is also a promotional section for 'THE SIMPSONS' stamps, featuring a booklet of 20 stamps for \$8.00 and a 'Buy Now' button.

At the bottom, there are several informational sections: 'Would you like to...?' (with links for postal pricing, hold mail, address changes, PO Box, custom postage, and passport), 'News & Announcements', 'Business Resources', and 'What Do You Pay for Shipping?'. A red circle highlights the 'Business Customer Gateway' link in the bottom right corner.

## Access your account through the Business Customer Gateway

- New users choose a business account in registration process
- Business Services Administrator (BSA) role
  - New business locations has at least one user assigned to the BSA role
  - BSA approves its users' services and access
  - BSA verifies its users are linked to correct Customer Registration IDs (CRID displays behind business name in User Request)
- Request Service(s)
  - Manage Mailing Activity
  - Mailer ID System
  - FAST®
  - CSA (Customer Supplier Agreement)

- **Verify Business Profile**
  - Verify CRID / Location(s)
  - Obtain CRID of business location (sending file)
    - ✓ Record this CRID in Mail Facility ID field in your Mail.dat® and Mail.XML® specification
- **Acquire Mailer ID (MID) (if applicable)**
  - Access Mailer ID system from the Business Customer Gateway
  - Select business location to be linked to MID and Request MID
- **Validate Mailer ID (for record keeping)**
  - Verify MID displays in Profile and is associated to the desired location (CRID).
  - If user MID is not listed for your company location, user contacts the Help Desk.

- Design Barcode (check all that apply)
  - IMb, mailpiece barcode
  - IM tray label
  - IM container label
  
- Validate Barcode
  - IMb, mailpiece barcode
  - IM tray label
  - IM container label

- Log on to the Business Customer Gateway
- Access the Test Environment for Mailers (TEM)
- Complete Full-Service File TEM Worksheet
- Complete TEM process
  - Download Client software from TEM
  - Send the Help Desk an email (link on Data Exchange Page) of readiness notification to begin testing.
  - Email to the Help Desk include: Company Name, Contact Name, Phone Number, Data Exchange Method (Mail.dat® 09-1)
  - Receive test scenarios from Help Desk (no later than the next business day)

- Access the TEM at <https://tem.uspspostalone.com>
  - o Comply with the test scenarios
  - o Submit files according to the required scenarios  
(The Help Desk will work with customers to resolve any issues with files)
- Once all the existing scenarios have been successfully completed and validated, you will be advised of the next step

Scenario FC1A: Submit an ‘original’ Mail.dat file that contains the information necessary to generate the following documents:

- Qualification Report including Container Information (CSM Container status is ‘blank’ for an original file)
- Version Summary Report
- Then submit a ‘ready to pay’ Mail.dat file that contains the information necessary to generate the following documents:
  - o PS Form 3600 - Postage Statement - First-Class and Priority Mail (CSM Container status is ‘R’ for ready-to-pay)
  - o Reconciliation Report

All scenarios have been completed successfully

- **BME Authorization**  
(BME will contact the customer to authorize the customer to submit files to production)
- **BMS Authorization**  
(BMS will run parallel test for the special postage payment systems and then authorize customer to submit files for production)

## Finalize Feedback for Production through the Business Customer Gateway

- Update Profile (use Profile feature)
- Delegate MID (use Mailer ID System)
- Data Distribution to recipients (use Mailer ID System)