User Access to Electronic Mailing Information and Reports Guide

Version 4.2

June 25, 2009

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Table of Contents

1 Introduction

1.1 The Business Customer Gateway

The Business Customer Gateway is the new interface in to all United States Postal Service (USPS) online offerings. This includes previous functionality currently used by continuing Postal Service customers and new functionality which support Intelligent Mail services. The gateway enables a single, unified landing and entry point for business customers to access USPS services. These services are defined as supporting business functions, accessed through the gateway. Customers can enter the gateway directly from http://www.usps.com and by clicking the link on the lower right corner.

Gateway users will enjoy an improved customer experience with an array of helpful features.

- Consolidate Postal Service online offerings
- Provide single entry to all Business Services
- Integrate customer profiles across all USPS services and applications
- Enable customers easy access to USPS electronic mailing functionality
- Help drive customer decisions with self-service capability
- Allow customers to manage their own user base

1.2 About this Guide

The primary purpose of this Guide is to provide information on how to access functionality, mailing reports and newly introduced business services through the Business Customer Gateway.

This guide replaces the "Intelligent Mail Full-Service Option User Access and Reports Guide" and the "Ready, Set, Go! Guide". It has been expanded to describe how to navigate new gateway features, reports access and how to participate in the options for using Intelligent Mail services. Topics of special interest include:

- Business Services Administrator
- Mailer ID (MID) System
- Customer Registration ID (CRID)
- Basic Option
- Full-Service Option
- Intelligent Mail Feedback
- Test Environment for Mailers (TEM)
- Facility Access and Shipment Tracking (FAST)
- Full-Service Reports Access

Symbols used in this Guide:

Important information to bookmark

Caution

Recommended procedure

Time sensitive information

1.3 Finding Information

Detailed documentation and guides related to Intelligent Mail mailing solutions are available on the Rapid Information Bulletin Board System - RIBBS® Website at http://ribbs.usps.gov/index.cfm?page=intellmailguides.

- Intelligent Mail Full-Service Checklist: *guidance for migrating to the Mail.dat format 09-1*
- A Guide to Intelligent Mail for Letters and Flats: *comprehensive information of Basic and Full Service*
- A Resource Map to Intelligent Mail Documents: *quick reference to Intelligent documentation*
- Postal Service Mail.dat Technical Specification: *electronic documentation and Mail.dat development*
- Postal Service Mail.XML Technical Specification: *Full-Service data exchange and eDoc messages*
- A Beginners Overview to Intelligent Mail Services: *primer on USPS Intelligent Mail solutions*
- A Guide to Customer/Supplier Agreements: *purpose and scope*

Other useful USPS publications found at http://ribbs.usps.gov/acs/documents/tech_guides/

- Pub. 8A - Address Change Service: *details of the traditional Address Change Service*
- Pub. 8B - OneCode ACS Technical Guide: *information to participate in OneCode ACS®*

1.4 Electronic Documentation Overview

The *PostalOne!*® system provides Mailers with options to electronically submit postage statements and supporting documentation to the USPS®. There are many advantages to electronic submission of mailing information such as, streamlining the mailing process, improving accuracy of information, eliminating hard copy documentation, and enhancing the Mailers service.

As of May 18, 2009, in addition to the electronic documentation (eDoc) option, the *PostalOne!* system offers two options for using the Intelligent Mail® barcode – the Basic option and Full-Service. Under the Basic option, the Intelligent Mail barcode contains routing information for the delivery address but does not need to uniquely identify the mailpiece. Under Full-Service, Mailers are required to use unique Intelligent Mail barcodes on mailpieces, trays and containers, and electronically submit postage statements and mailing documentation through the *PostalOne!* system.

Full-Service Mailers will have three options to submit electronic mailings: Postal Wizard, Mail.dat®, and Mail.XML™. Postal Wizard submissions and Mail.dat files will be accepted in May 2009, and Mail.XML will be accepted beginning in November 2009. Mailers who qualify for the Full-Service option can receive certain benefits, including Start-the-Clock information and Address-Correction information for qualified letters and flats that are endorsed as specified for OneCode ACS®. In addition to these benefits, beginning in November 2009, the Postal Service® will provide lower rates to Mailers that implement the Full-Service option. Refer to table 1-1 for a summarized view of the current options for participating in electronic submission. Please also refer to the Intelligent Mail Full-Service Checklist found on the RIBBS site; this document offers step-by-step guidance for migrating to the Mail.dat format 09-1 standard.

Table 1-1 Electronic Documentation and Intelligent Mail

Participation Status	Current Service	Service(s)	Submission Method		
Existing *PostalOne!* Mailer	eDoc	eDoc and Basic	Mail.XML	Postal Wizard	Mail.dat
New *PostalOne!* Mailer	None	eDoc and Basic	Mail.XML	Postal Wizard	Mail.dat
Existing *PostalOne!* Mailer	eDoc	eDoc			
New Mailer	None	eDoc	Mail.XML	Postal Wizard	Mail.dat
Existing *PostalOne!* Mailer	eDoc	eDoc and full-service	Mail.XML	Postal Wizard	Mail.dat
New *PostalOne!* Mailer	None	eDoc and full-service	Mail.XML	Postal Wizard	Mail.dat

A Mailer can participate in electronic documentation (eDoc) with or without Intelligent Mail service. Use of electronic documentation is optional for Intelligent Mail Basic Service; electronic documentation is required for Intelligent Mail Full-Service. The level of detail required for Basic and Full-Service is more in depth than the eDoc currently supported in the *PostalOne!* system.

As part of the Basic and Full-Service options, Mailers are required to provide information for every mailpiece in their mailing except for mailings that do not require documentation to support presort. In this case, mailings of fewer than 10,000 pieces with postage affixed to each piece at the correct rate or with all identical weight pieces, the pieces are separated by rate and where the Postal Wizard option is the tool to use.

1.5 Intelligent Mail Solutions: Planning Ahead

The option for submitting electronic mailing information for the Intelligent Mail basic service using Wizard Web Services (WWS) will be replaced by Mail.XML in November 2009. WWS will remain available after May 18, 2009, but will be no longer available after November 2009. The Postal Service will offer an alternative option, Mail.XML, in phases after May 18, 2009. A full set of Mail.XML messages will become available in the November 2009 release. Mailers are not currently required to submit mailing documentation such as postage statements and qualification reports electronically, but may choose to under the Basic option. The price for the Full-Service option will be lower than the Basic option in the Fall of 2009. Refer to the Guide to Intelligent Mail for Letters and Flats for comprehensive information on Full-Service standards that are eligible for applicable price differentials in the fall of 2009.

1.6 Intelligent Mail Barcode Requirements

Currently, the Intelligent Mail barcode can be used on all First-Class Mail cards, letters and flats; Standard Mail letters and flats; Periodicals letters and flats; and Bound Printed Matter flats. Customers can use the Intelligent Mail barcode on card-size, letter-size, and flat-size mailpieces, and the automation price is available for card, letter, and flat-size mailings that have a POSTNET barcode or an Intelligent Mail barcode applied. Refer to the A Guide to Intelligent Mail for Letters and Flats for comprehensive information on Intelligent Mail requirements and standards. As a reminder, the following timeline is provided.

Intelligent Mail Barcode Timeline*:*

☑ May 2009: two options enabled for using Intelligent Mail® barcodes: Basic Option and Full-Service Option.

Basic Option. Mailers must use the Intelligent Mail® barcodes on their letter and flat mailpieces in place of the POSNET barcode.

Full-Service Option Mailers must use Intelligent Mail® barcodes that provide unique identification of the mailpiece, tray or sack label and containers. They must also provide their mailing information electronically to the Postal Service.

☑ May 2009: Intelligent Mail Barcode Service Type Codes take affect and they are different for the Basic and Full-Service options. Refer to the Guide to Intelligent Mail for Letters and Flats.

☑ May 2009: automation flats will be required to bear barcodes that include delivery point routing codes, as currently required for automation letters.

✓ May 2010: Qualified Business Reply Mail (QBRM) letters and cards, and Permit Reply mailpieces will be required to use Intelligent Mail® barcodes (use of a Mailer ID is required)

✓ May 2011. Business Reply Mail and Courtesy Reply Mail may have a POSTNET™ barcode until May 2011. After May 2011, the use of Intelligent Mail® barcodes is required

May 2011.The POSTNET™ barcode will be allowed on automation cards, letters, and flats until May 2011. The PLANET Code® barcode will be retained for Confirm service as long as Postal Service continues to allow the POSTNET™ barcode for automation price eligibility.

2 Navigating the Business Customer Gateway

2.1 Before Getting Started

The Business Customer Gateway landing page offers information on the services available as well as general information and customer support links that are useful to business customers. The Gateway landing page also presents task oriented links, rather than links that call out functionality by the application name. Once users are granted approval, they will be able to access the functionality included under that service from their Business Customer Gateway homepage (Figure 1).

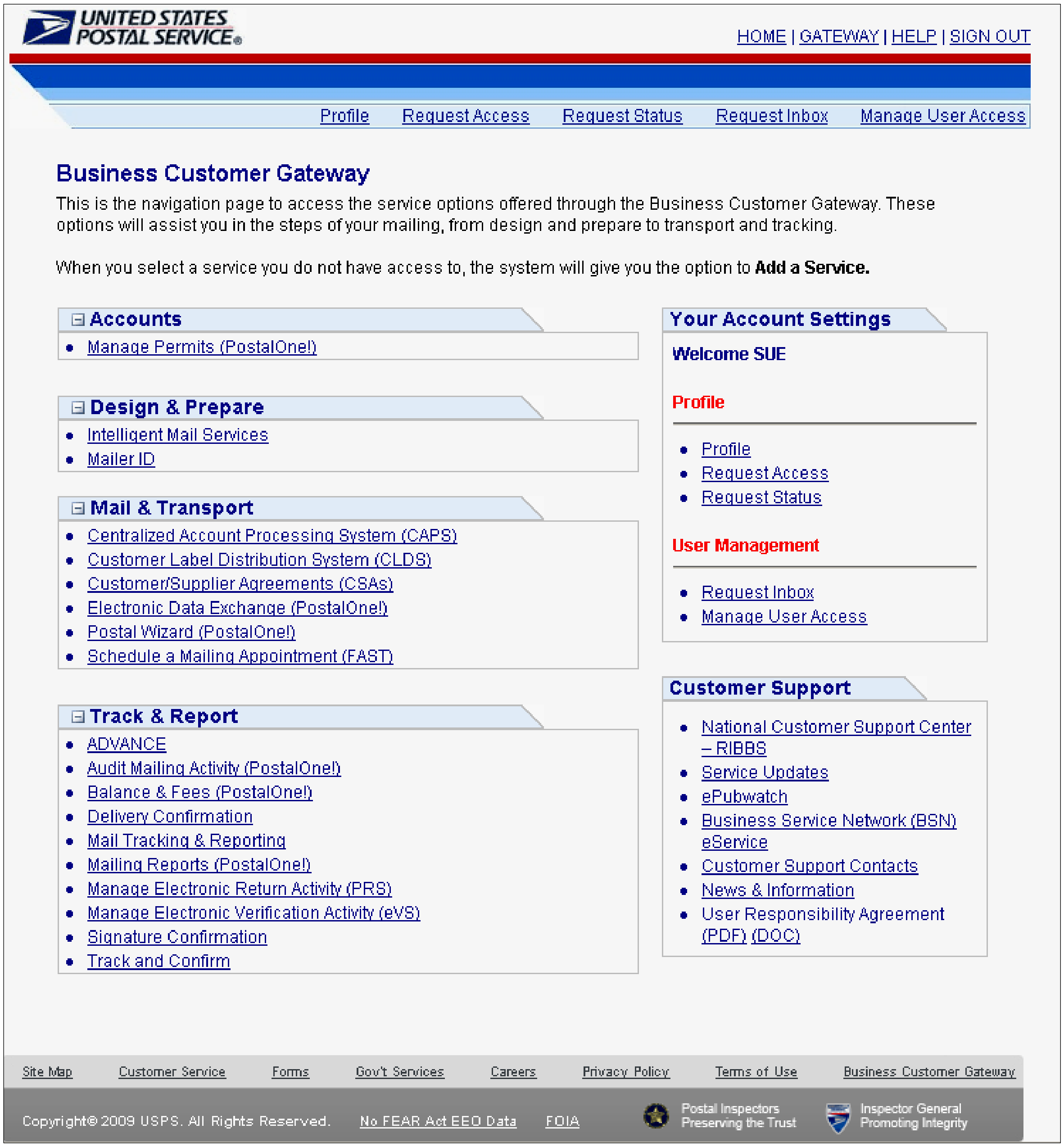


Figure 1: Gateway user homepage –the user is signed in.

A **User Homepage** features standard navigational hyperlinks.

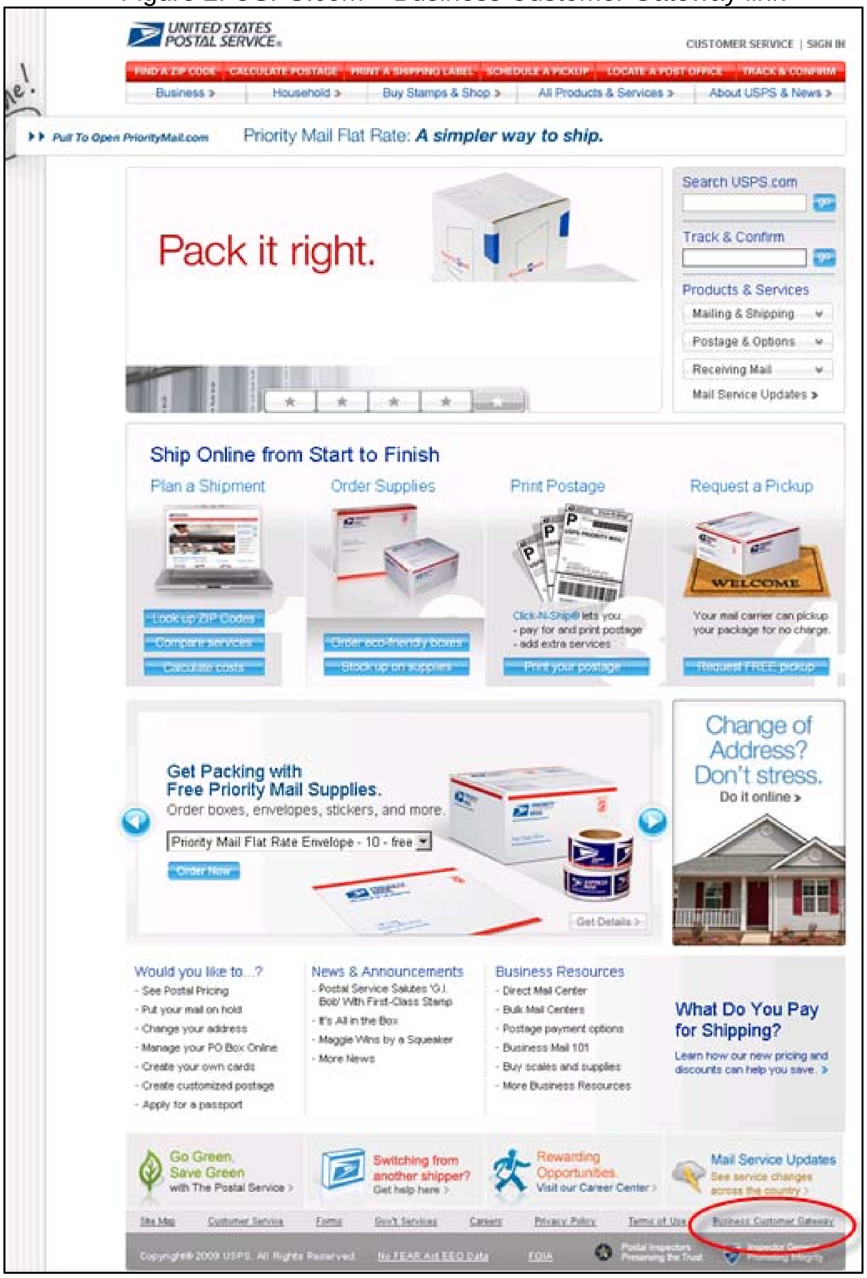
- **HOME** on the Business Customer Gateway will return a user to USPS.COM
- **HOME** inside a Service (such as PostalOne! Mailing Reports) will return a user to the Business Customer Gateway.
- **GATEWAY** returns a user to the Business Customer Gateway Signed In page.
- **HELP** takes a user to the USPS.COM Customer Service page.
- **SIGN OUT** returns a user to the Business Customer Gateway Sign In page.

2.2 The USPS.com Web-site

The United State Postal Service (USPS) official Web-site, http://www.usps.com provides a direct link to the Business Customer Gateway. The Business Customer Gateway link is located at the bottom right corner of USPS.com (Figure 2). Selecting this link takes a user to the Business Customer Gateway landing page (Figure 3).

The Business Customer Gateway link replaces the National & Premier Accounts link on the USPS.com homepage. The new Business Customer Gateway is available for ALL business customers – large or small.

Figure 2: USPS.com – Business Customer Gateway link



2.3 Continuing Postal Service Customers

Continuing Postal Service customers of *PostalOne!* and FAST that logged in through the *PostalOne!* log on page during the migration window, 3/30/2009 and 4/15/2009, can log on to the new Business Customer Gateway with their existing Usernames and Passwords and access their “new” services that have been mapped from roles previously held in *PostalOne!* or FAST systems.

Continuing Customers of *PostalOne!* and FAST that did not log in through the *PostalOne!* log on page during the migration window, but had previously completed the security question, had only their Usernames migrated to the Business Customer Gateway. These customers will be able to log on to the new Business Customer Gateway with their existing Usernames but will be required to change their Passwords.

Continuing Customers of *PostalOne!* and FAST that did not log in through the *PostalOne!* log on page during the window and had not previously completed the security question will need to register as new customers. Refer to Figure 6.

The new Gateway online application process accepted new users beginning May 11, 2009. The Gateway Help Desk is available at 1-800-522-9085 if you have any questions, problems accessing your accounts, or submitting electronic documentation.

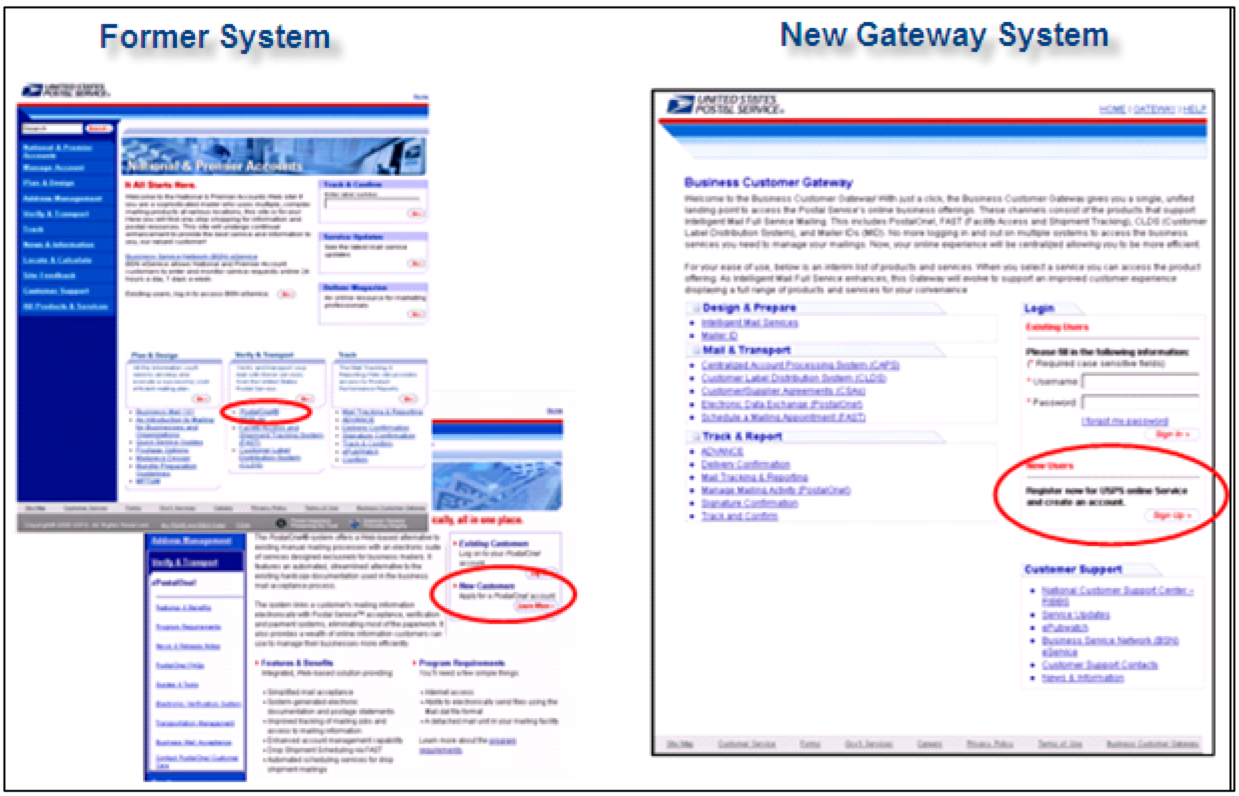


Figure 3: Migration to the Business Customer Gateway

Previous System Functionality	New Gateway Access
PostalOne! Preparer	Manage Mailing Activity
PostalOne! Mail Owner	Manage Mailing Activity
PostalOne! eVS	Manage Electronic Verification Activity (eVS)
PostalOne! PRS	Manage Electronic Return Activity (PRS)
PostalOne! eDropship	View Mailing Induction Activity
PostalOne! External Site Administrator	Business Service Administrator (BSA)
PostalOne! Owner Auditor	Audit Mailing Activity
FAST	Schedule a Mailing Appointment
FAST – CSA	Customer/Supplier Agreement

Figure 4: Previous *PostalOne!* Roles mapped to new Gateway links

Previous user roles in the former *PostalOne!* system, are mapped to new Business Customer Gateway links (Figure 4).

Intelligent Mail Full Service	New Gateway Access
Full Service Information	Intelligent Mail Services
Manage & Apply For Mailer IDs	Mailer ID
CRID Assignments	My Profile
Order Barcode Tray Labels	Customer Label Distribution System
Customer Supplier Agreements	Customer/Supplier Agreements
Mail.dat 09-1	Electronic Data Exchange
Test Environment for Mailers	Electronic Data Exchange
FAST Appointments	Schedule a Mailing Appointment
Full Service Reports	Mailing Reports

Figure 5: Intelligent Mail Full-Service option - Gateway links

As Intelligent Mail Full Service matures, the Gateway will evolve to support an expanded array of services, tools and resources (Figure 5).

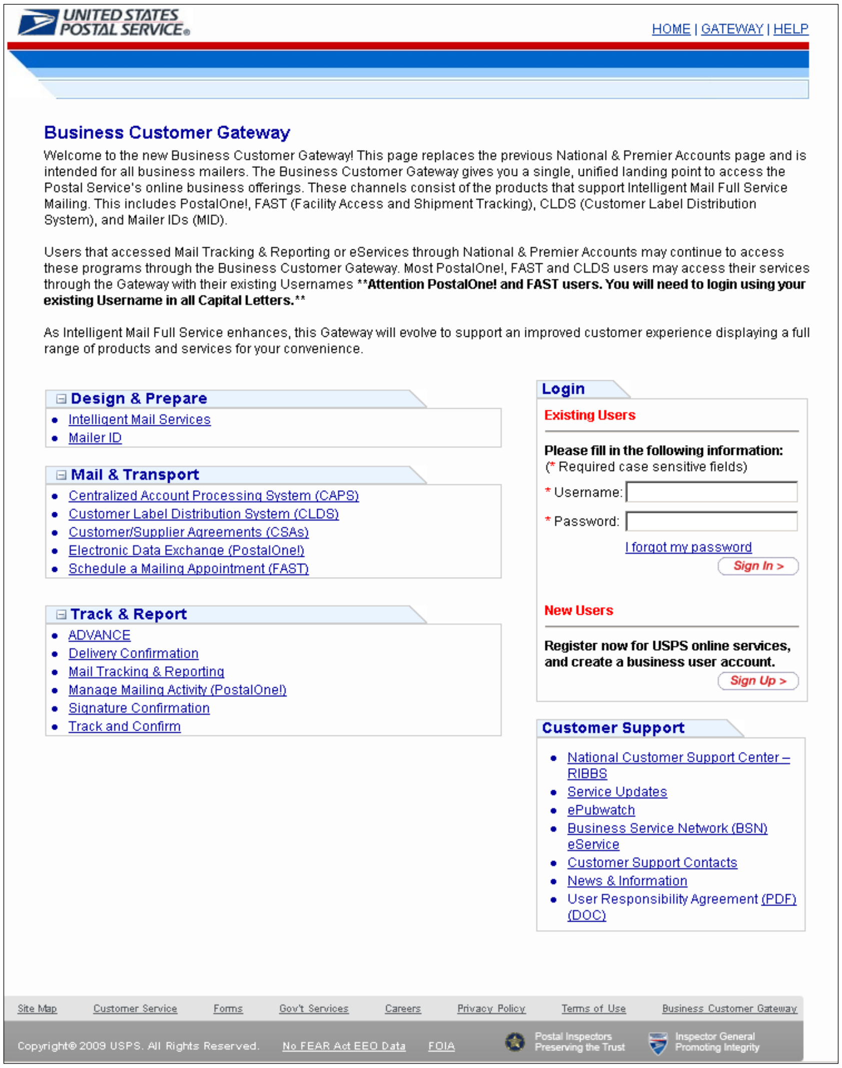


Figure 6: Business Customer Gateway Landing Page (User Sign-in Sign-up)

Certain functions on the Gateway user's homepage are service groupings in the Gateway Request Access scheme. Such service groupings are multiple but related services under one group heading. *Manage Mailing Activity* for example is a business service group, comprising previous *PostalOne!* functionality and new Gateway services (Figure 7).

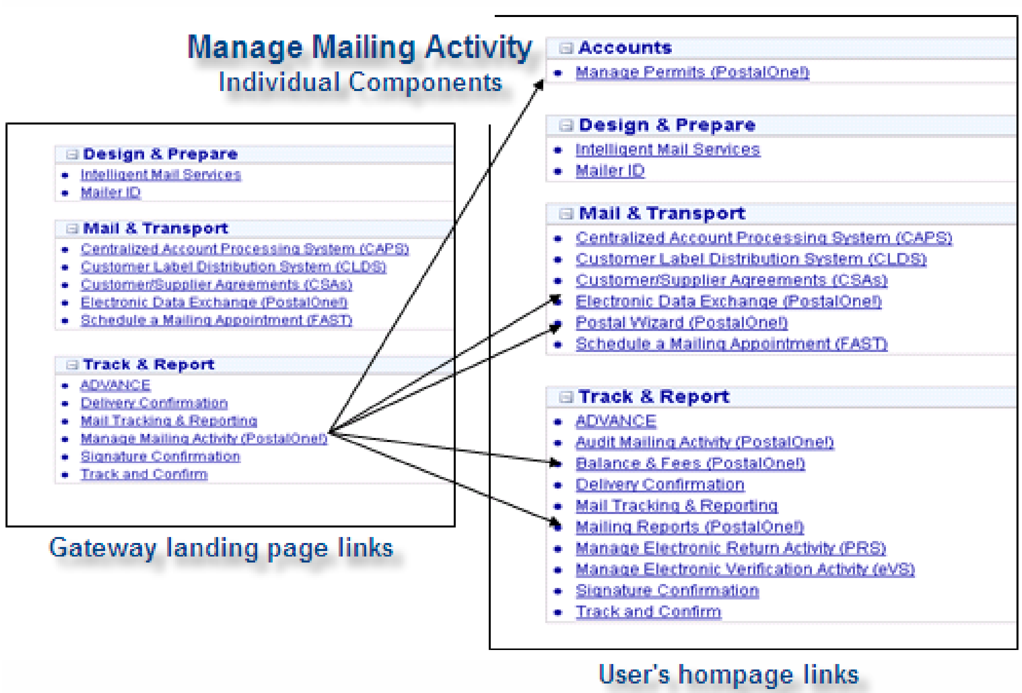


Figure 7: Manage Mailing Activity

Individual services do not display separately on the Business Customer Gateway landing page, but display independently on the Gateway user's homepage (Figure 7). The display of individual services is intended to enable easier and direct access.

Continuing users can access the functionality for the former *PostalOne!* Preparer role through links found on the user's homepage. Refer to the Preparer Role mapped to the new Gateway site (Figure 8).

Former Preparer View	New Gateway access
Dashboard	Mailing Reports
File Transfer	Electronic Data Exchange
Download Batch Processor	Electronic Data Exchange
File Validator	Electronic Data Exchange
Metrics Search	Electronic Data Exchange
Metrics – File Transfer	Electronic Data Exchange
Customer Supplier Agreements	Customer/Supplier Agreements
Submit a Form	Postal Wizard
Mail Quality Reports	Mailing Reports

Figure 8: Former Preparer View

Continuing users can access the functionality for the old *PostalOne!* Owner role through links found on the user's homepage. Refer to the Owner Role mapping (Figure 9).

Previous Owner View	New Gateway Access
Balance and Fees	Balance & Fees
Submit a Form – Postal Wizard	Postal Wizard
Submit a Form – Mail.dat	Electronic Data Exchange
Reports	Mailing Reports
Manage Permits	Manage Permits

Figure 9: Owner Role Mapping

2.4 Customer Registration ID (CRID)

The Customer Registration ID is a 12 digit maximum, identifier created by the Customer Registration system to uniquely identify a USPS Customer at a business location address. For each unique combination of company name and physical address, the USPS will create a new CRID to identify that customer and for associating customer data. The CRID is the single, unique ID that connects a company's information at a specific geographic location across all USPS applications. A CRID will be associated to every Permit Number and Mailer ID that is issued (there may be multiple Permit Numbers or MIDs associated to a single CRID).

CRIDs are assigned during the initial login at the Business Customer Gateway. New users are urged to register with the same business information that the Business Services Administrator (BSA) entered for the desired location. Different CRIDs may unintentionally be issued by the system from differing addresses entered by users whose intent was to affiliate to a particular (CRID) location already in the system.

The CRID is similar to an account number and should be shared with affiliated users as necessary. CRIDs will display in the Profile Information within the Business Customer Gateway. A user can review CRID credentials and user profile information by clicking the Profile link (Figure 10).where business locations including the CRIDs associated to those locations are presented.

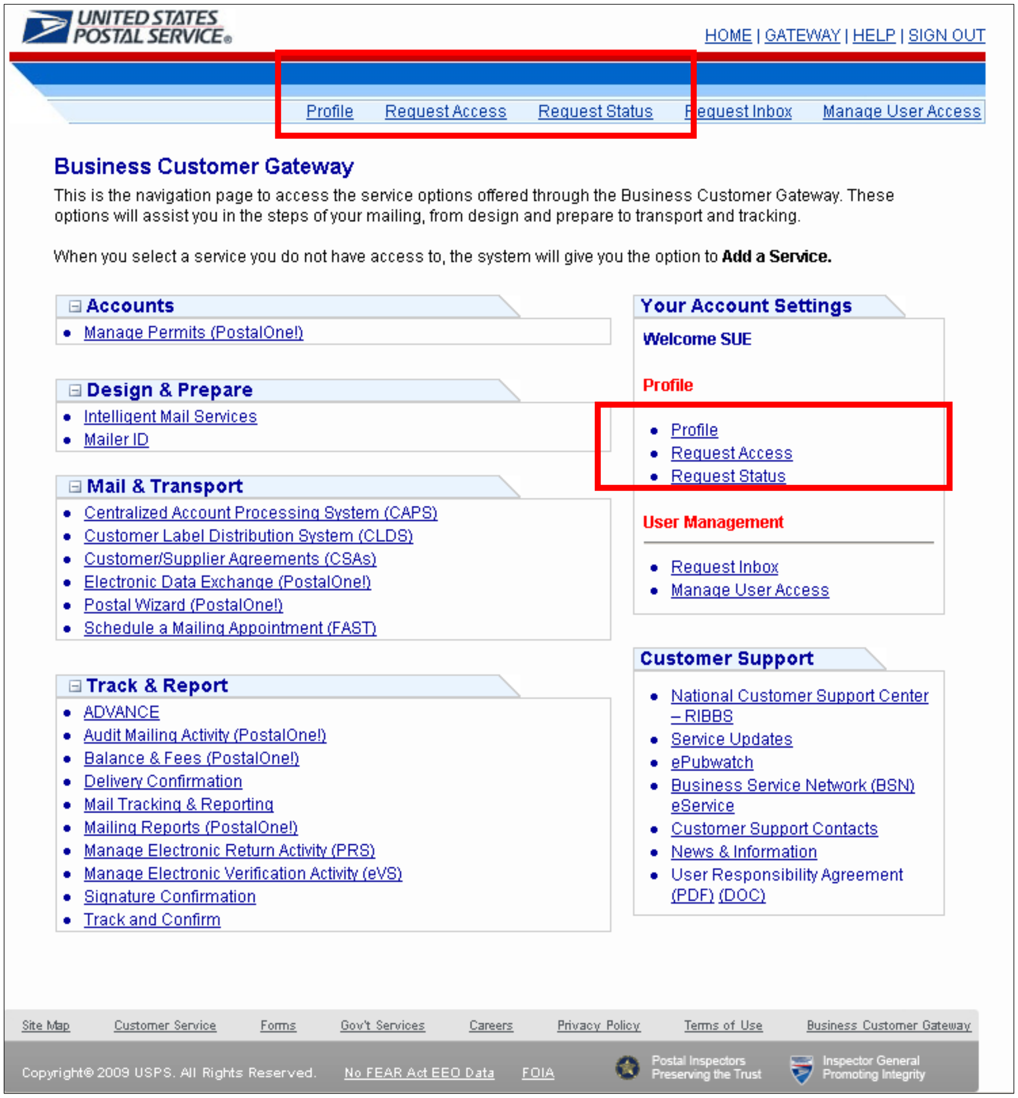


Figure 10: Access to a user's profile information

The user Profile Information displays the user's Business locations including the CRIDs associated to those locations (Figure 11). The Profile also displays the services a user has and the locations for which that service has been approved. There are various view options for a user including the ability to remove Services. Refer to Figure 14 for a summary of Business Customer Gateway administrative links and their functions.

Profile links allow current users self-service capabilities.

- view profile
- edit profile info for affiliate location(s)
- request access to additional business services and business locations
- monitor a request status for approval

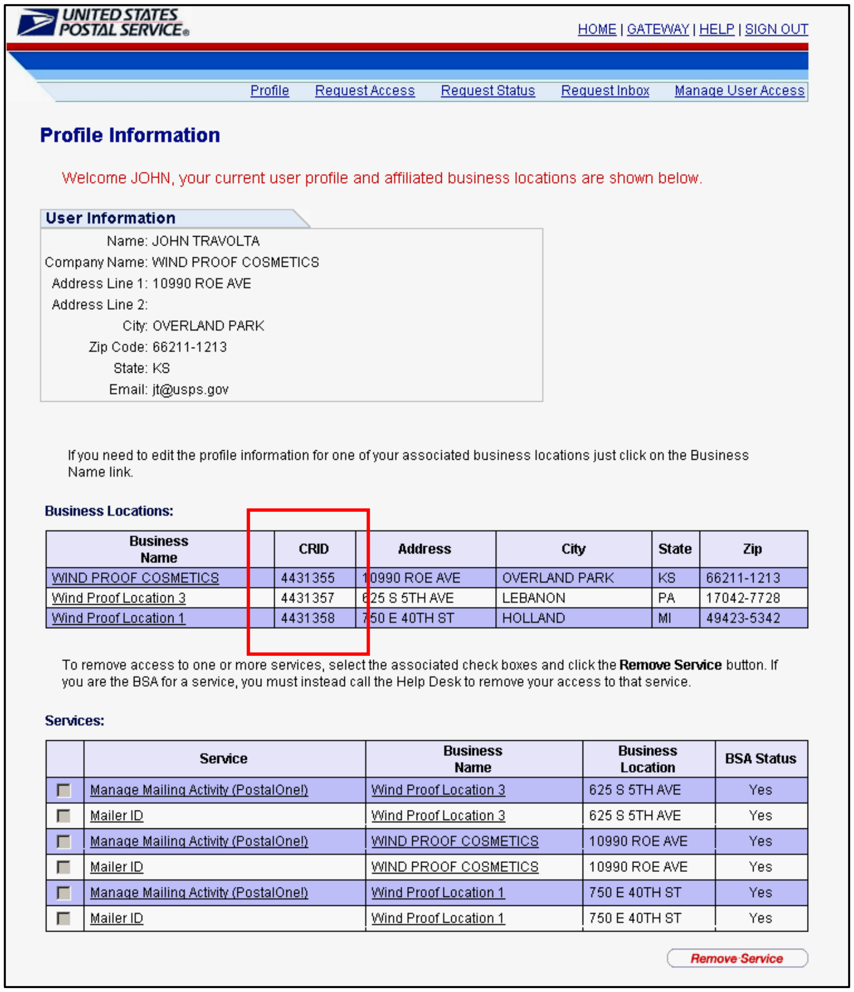


Figure 11: Profile Information screen

On the Profile Information page, the user has options to edit profiles of business locations and remove a service(s) associated to a business location. If a user is a Business Service Administrator (BSA), he/she must contact the Help Desk to remove access to a service(s).

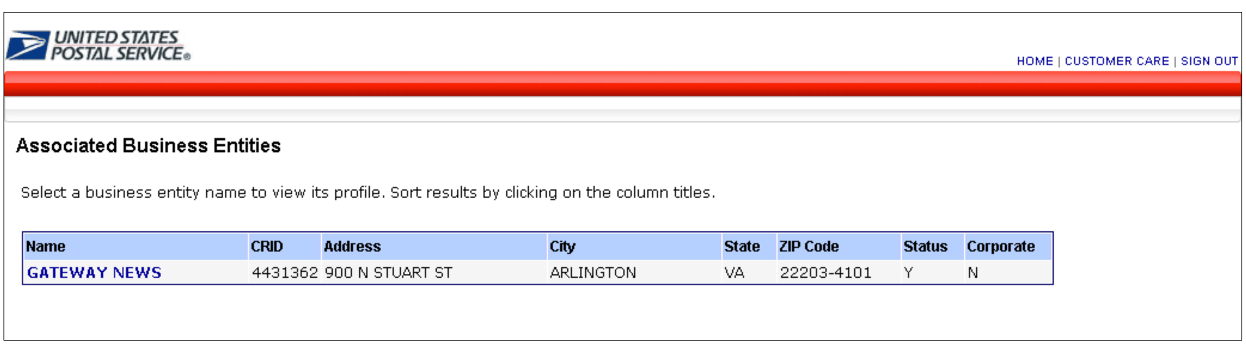


Figure 12: Associated Business Entity Profile Information screen

2.5 Managing Permits

A user can click the Manage Permits link to manage permits associated to the user's business entity. The user is directed to the Associated Business Entity Information screen that displays all linked permits to the user's business entity(s) (Figure 13).

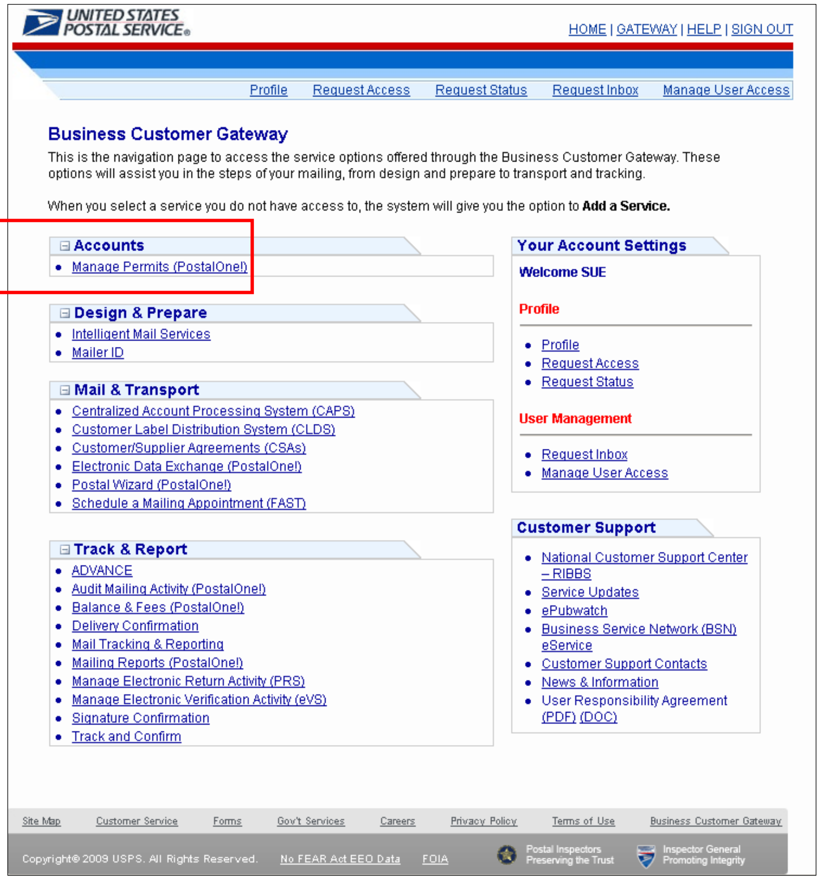


Figure 12: Users can access Manage Permits from their Gateway homepage.

Associated Business Entities

Select a business entity name to view its profile. Sort results by clicking on the column titles.

Name	CRID	Address	City	State	ZIP Code	Status	Corporate
BLUE PACKAGE DELIVERY SAINT PAUL	2086905	1636 GERVAIS AVE STE 3	SAINT PAUL	MN	55109-2136	Y	N
FEATHER GARDEN ASSOCIATES	4433206	2420 FEATHER GARDEN CIR	VINTON	VA	24179-5697	Y	N
AUTOMATED MAILING SYSTEMS	2127355	914 RHODES AVE NE	ROANOKE	VA	24012-8023	Y	N

Figure 13: Associated Business Entity listing page

A user can click a business name from the Associated Business Entities page to review profile(s). The user is directed to the Business Entity Information screen that displays all linked permits to the selected business entity (Figure 13-1).

The Permit Profile tab allows a user to locate accounts belonging to their business entity, validate ownership of permit accounts, and link them to their business entity.

The Permit Validation screen requires that after the (permit) accounts have been located, the accounts must be validated before they are linked and made available online for access by owners of those accounts. The system requires the user to verify one of the last 10 transactions applied to the (permit) account and other related account information before the user can access the permit account (Figure 13.2).

The Permit Contact Information screen (Figure 13-3) allows the user to update primary (permit) contact information. The Permit Manage Additional Info screen (Figure 13-4) allows the user to manage additional business entity information.

The BSA is allowed to edit contract information for validated (permit) accounts, limit access to accounts to specific users. By default, all users at business entity will have access to all accounts for that business entity. It is up to the BSA to limit access to accounts viewing. The BSA has the ability to edit and delete user-account linkages, as well as to un-assign accounts from their own view.

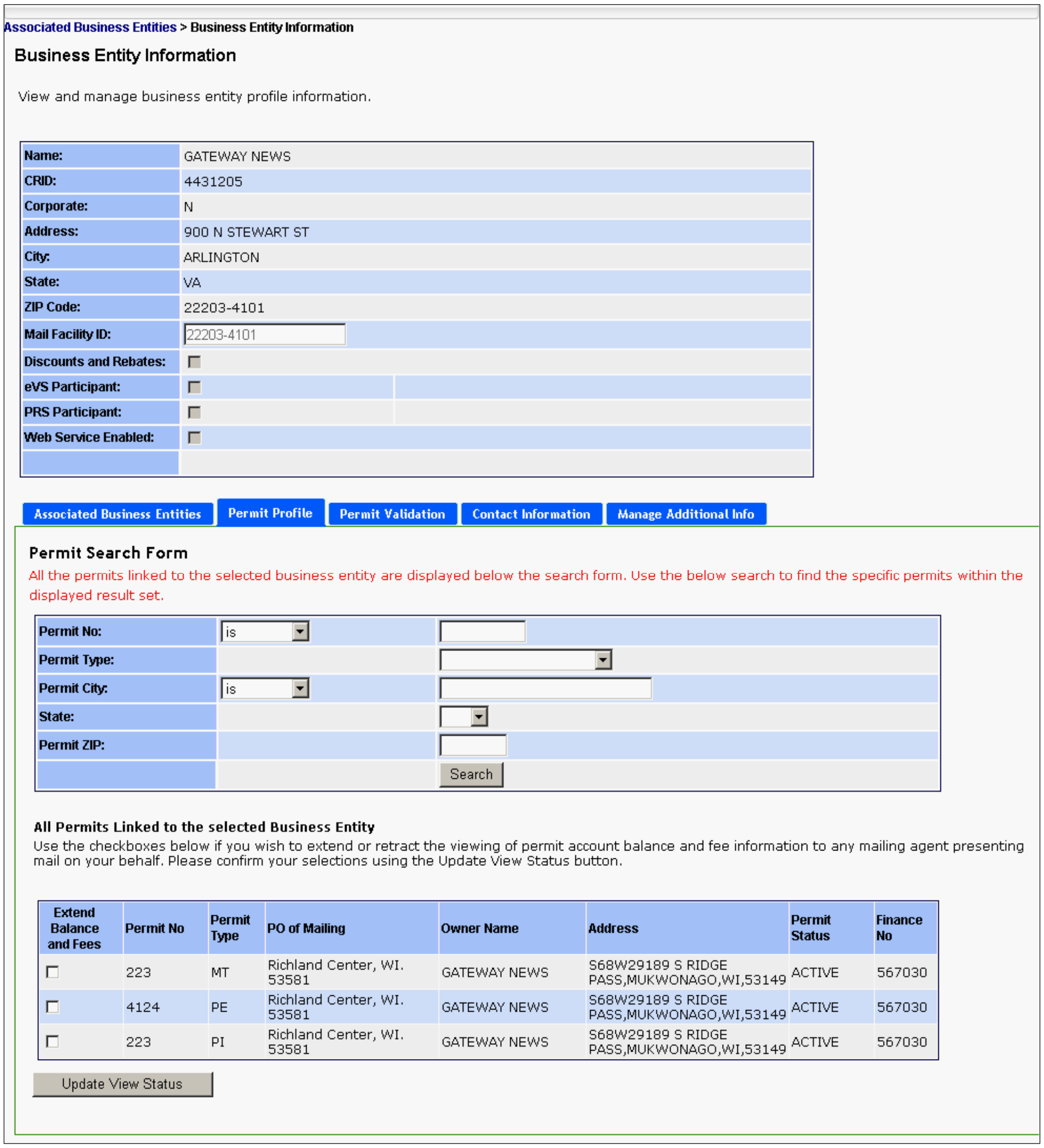


Figure 13-1: Business Entity Information screen

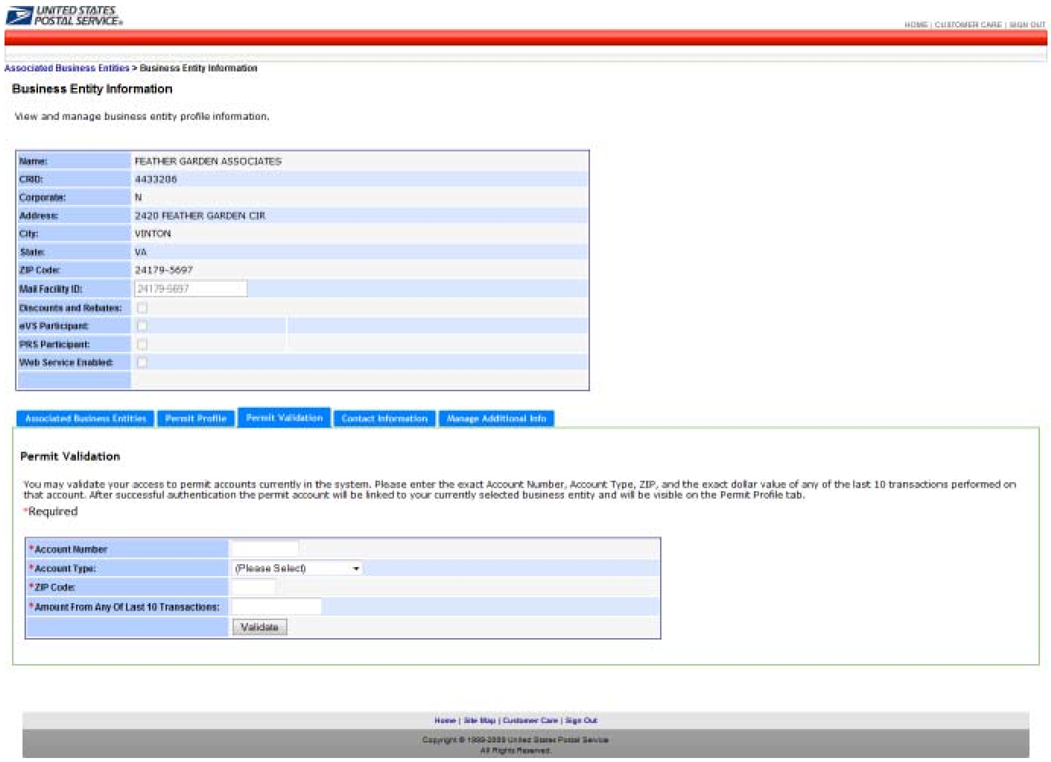


Figure 13-2: Permit Validation screen

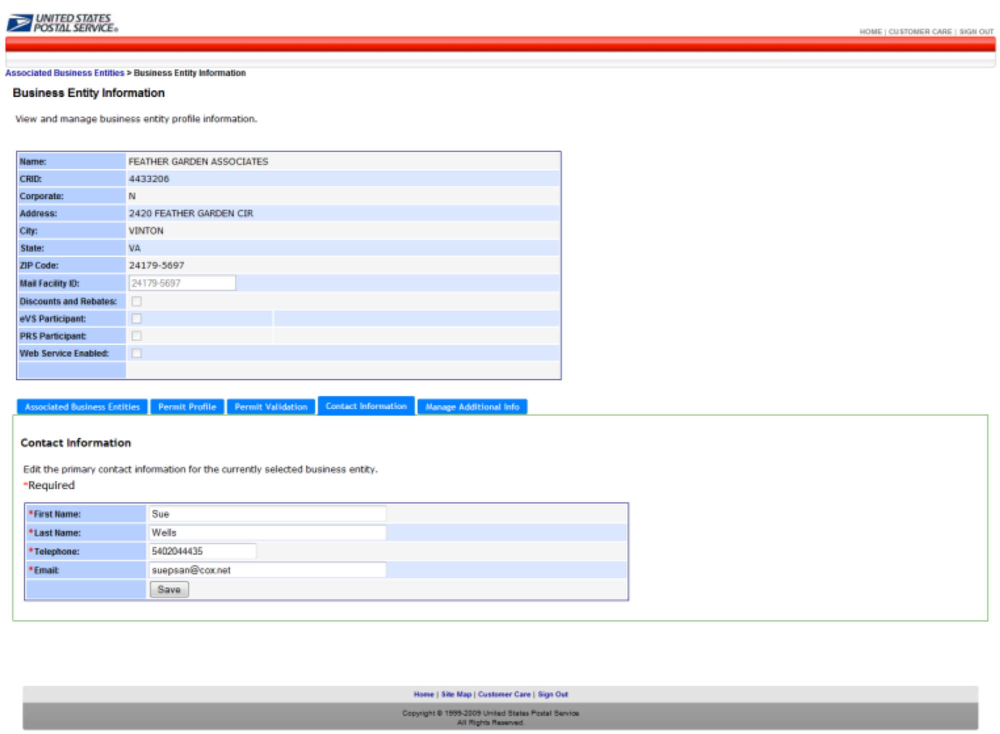


Figure 13-3: Permit Contact Information screen

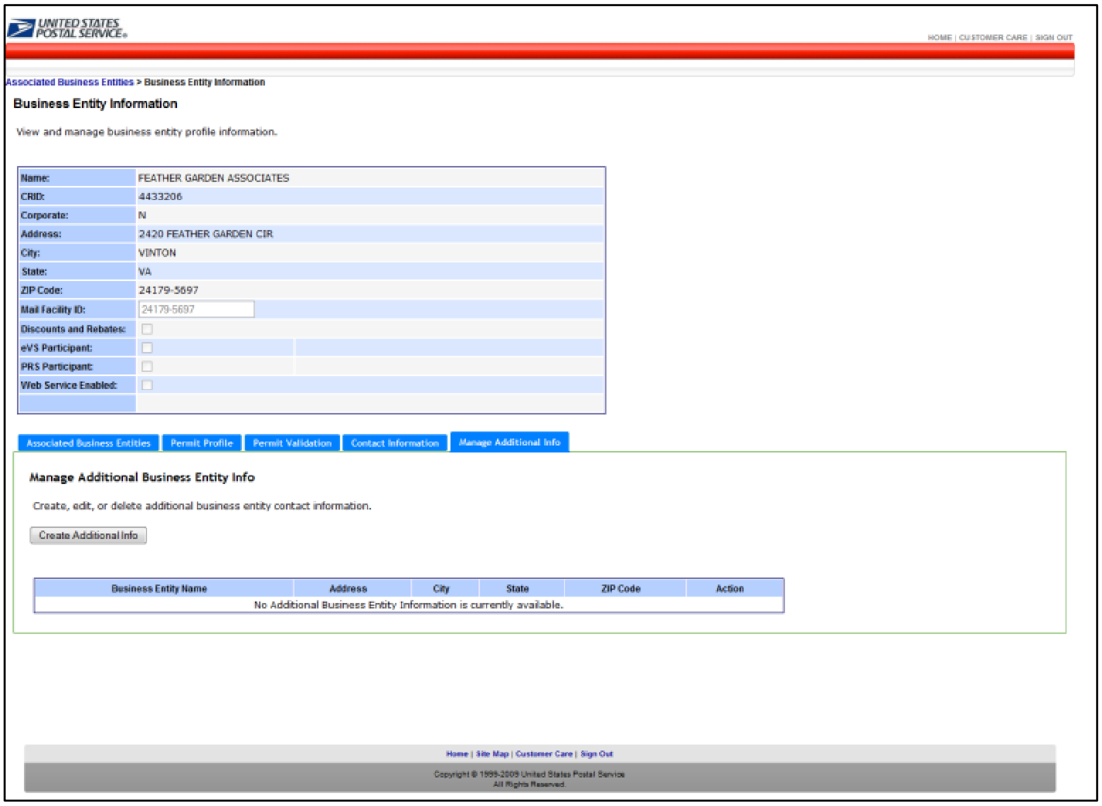


Figure 13-4: Permit Manage Additional Info screen

Gateway Link	Gateway Function Description
Profile	**Users can view their business locations and the services they have at each**
Request Access	**Users may request additional services or additional locations for a service**
Request Status	**User can see the status of their requests.**
Request Inbox (BSA Only)	**Administrator queue to approve user access requests**
Manage User Access	**Administrator tool to remove access or assign additional users the BSA role.**

Figure 14: Summary of general administrative links and corresponding Gateway functions

The Customer Support section of the Business Customer Gateway provides directs links to online resources (Figure 411).

- National Customer Support Center – RIBBS
- Service Updates
- ePubwatch
- Business Service Network – BSN eService
- Customer Support Contacts – Help Desk Contacts
- USPS News & Information

2.6 New Users and the Request Access Process

This section describes the general flow of a new user logging on to the Business Customer Gateway and requesting access to a service. Each screen during the account set up provides explanatory text to guide the user to the next step.

Users will find multiple ways to navigate the gateway as they become familiar with the site. Hyperlinks just below the USPS logo and blue banner navigate users directly to popular access points (Figure 10).

Business Customer Gateway Link	Gateway Function Description
Profile	**Users can view their business location and the services they have at each**
Request Access	**Users may request additional services or additional locations for a service**
Request Status	**User can see the status of their requests**
Request Inbox (BSA Only)	**Administrator queue to approve user access requests**
Manage User Access (BSA Only)	**Administrator tool to remove access or assign additional users to the BSA role**

Figure 10: General Gateway links on the user's homepage

2.6.1 New Users

New users can sign in at the gateway by clicking the New Users Sign Up button (Figure 11). During the initial sign up, a new customer will create a username and password (Figure 12).The user will receive a confirmation email from the USPS of the username and account type. The user will be prompted to continue with the initial sign up. This online process replaces the hardcopy 1357c document. As well, the Help Desk is no longer needed to create usernames and passwords to access gateway services. This new user sign-up and customer registration is now the standard process for all USPS online users.

NOTE: New usernames and passwords are BOTH case sensitive in the new registration system!

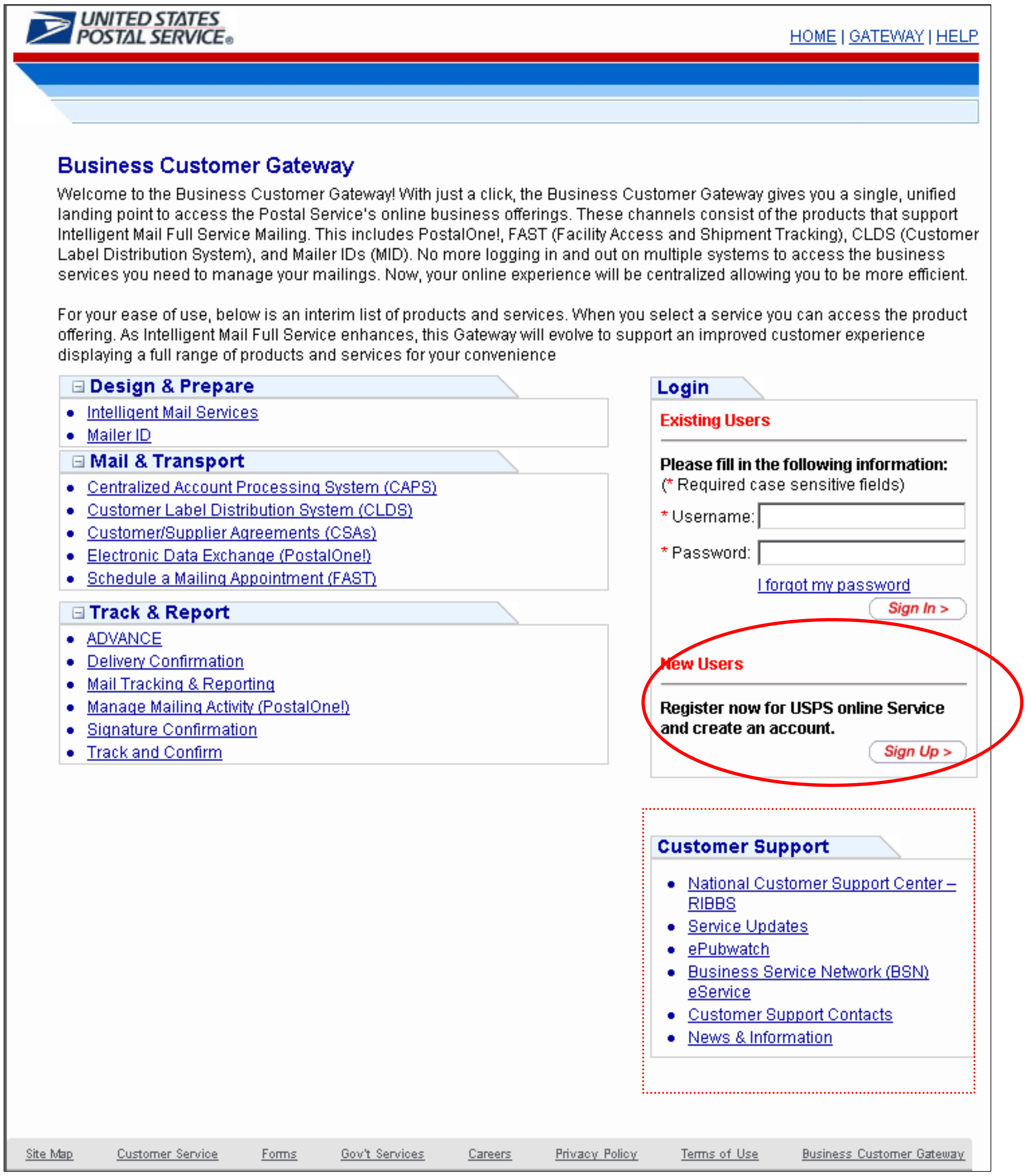


Figure 11: The Gateway Sign Up for new users

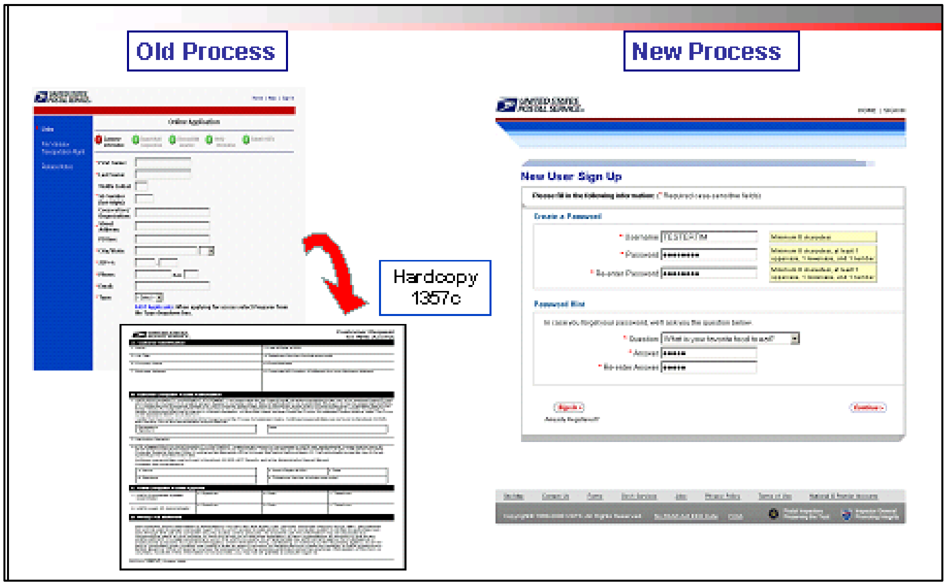


Figure 12: Creating Username and Password is now case-sensitive

When users create their profiles, the system requires an account type selection of either *Personal* or *Business* (Figure 13). Users requiring access to the Business Customer Gateway must set up a *Business* account. Customers interested in USPS retail products and services can select the *Personal* account type but are also required to register through this system. *Personal* accounts are directed to USPS.com after registration. A user can hold both a personal and business account, and are required to use the established username and passwords for accessing the different accounts.

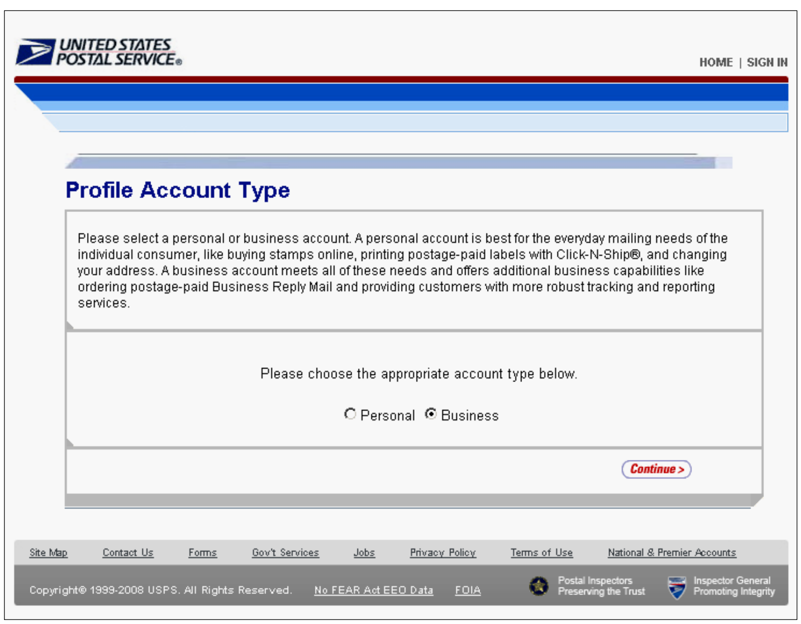


Figure 13: Establishing the business account type

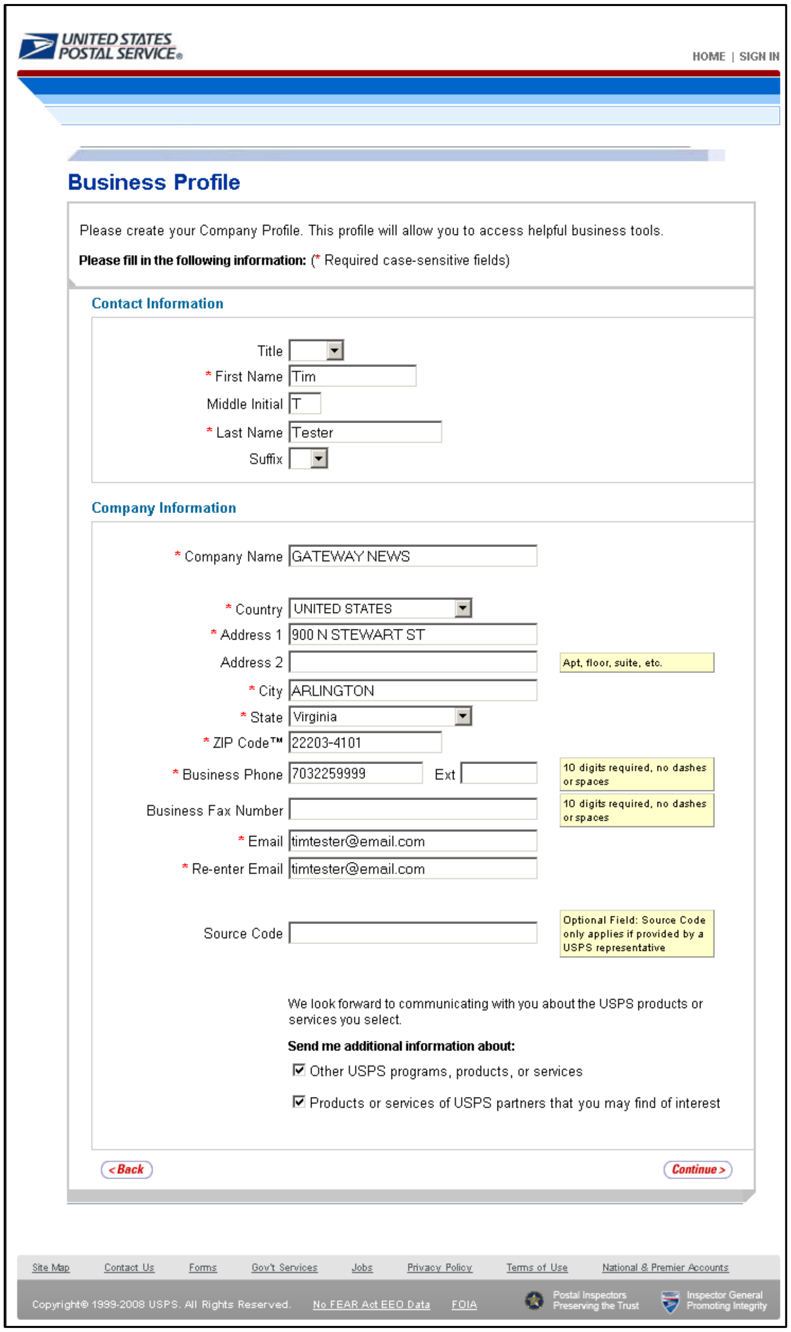


Figure 14: Entering company information

Note: On the Business Profile page users enter company information (Figure 14). If users do not enter a business name and address consistently as may be previously captured by the system, a different Customer Registration ID (CRID) may unintentionally be assigned and the user will not be linked to the business entity for the desired location. Business Service Administrators need to be diligent about how their affiliated users enter company information when applying for the same service for a desired location. Refer to the section 2.8 below for more information on Business Service Administrator role.

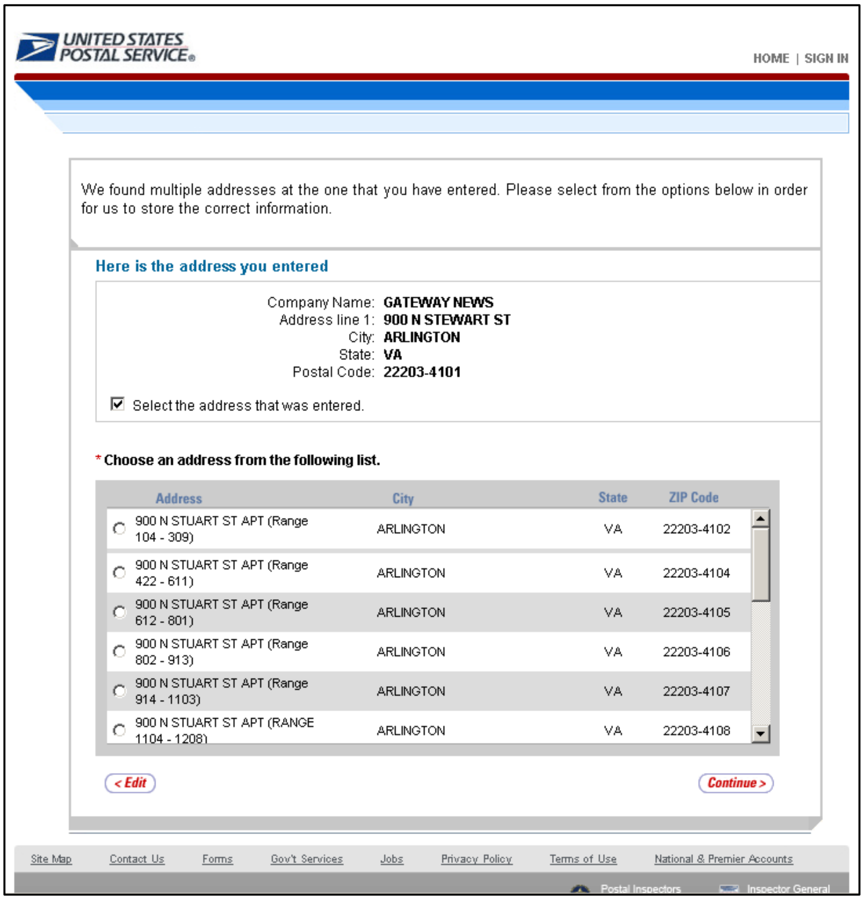


Figure 15: Confirming the Business Location

The registration process provides Address Management System (AMS) address standardization to support consistent address information entry. The AMS enables the ability to ensure each mailpiece will have a correct delivery point ZIP. AMS does this by maintaining current data on each delivery point and by regularly providing that data to Postal Service facilities and customers.

Please note that a user must input all fields marked with a red asterisk and that some fields are case-sensitive. The business location screen (Figure 15) appears when the Business Profile is submitted. The AMS queries standardized addresses that approximate the address entered by the user, the system prompts the user to confirm which address to apply.

The system sends a new user confirmation and pending status emails. It is therefore important that a valid email address and contact information are entered correctly.

The Company Profile Summary screen (Figure 16) appears when the contact and company information is entered and submitted. The system will allow the user to *Edit* or *Continue* within the same session. A user can log back in at any time and edit Profile data as necessary.

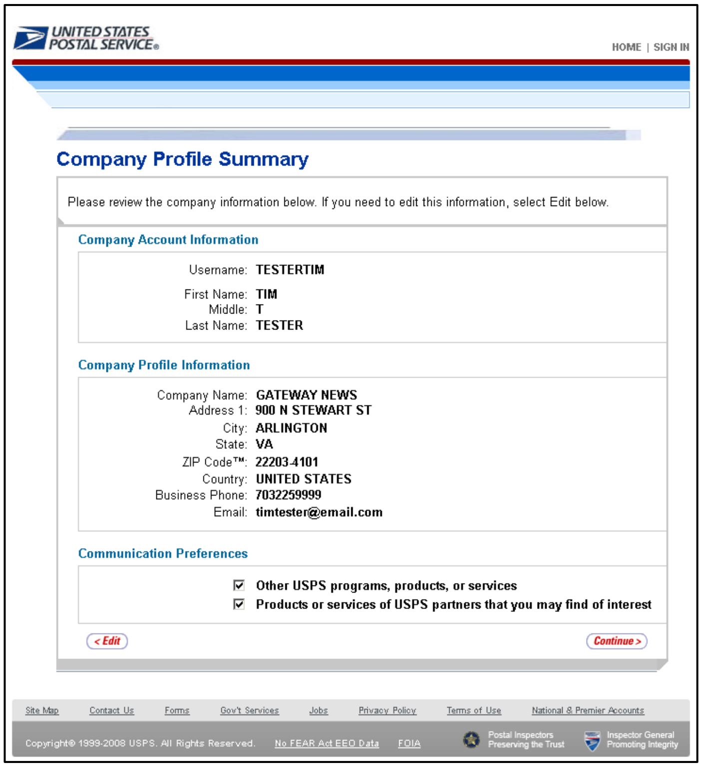


Figure 16: Reviewing data entered

This Privacy Act screen (Figure 17) appears when the Company Profile information is fully entered. For the Privacy Act, the user must consent to the term and conditions of the Act, and select the *Yes* radio button in order to continue.

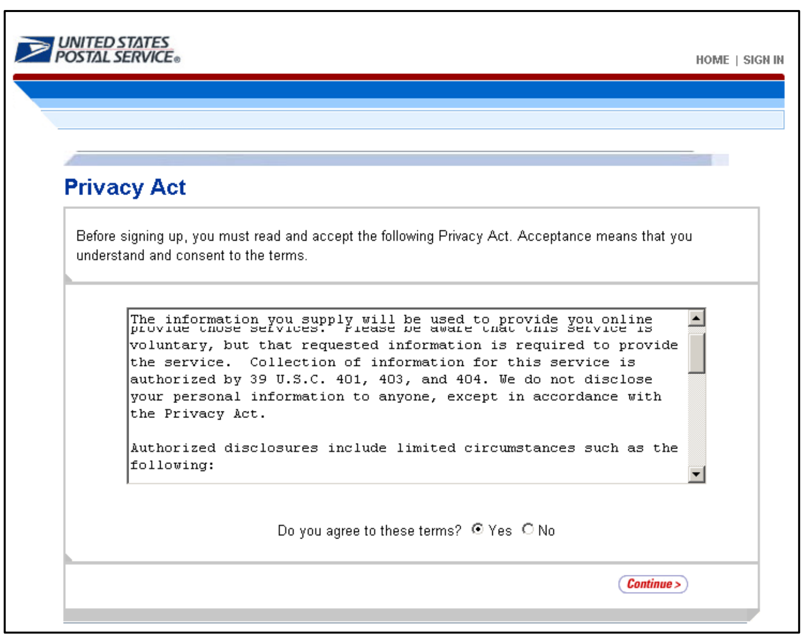


Figure 17: Accepting the Privacy Act

2.7 Requesting Business Services

A business service is functionality, which a user can request through the Gateway Request Access process. Business services are grouped under three common areas: Design and Prepare, Mail & Transport and Track & Report. A *Service* must be authorized for a given user before access is enabled. A user can apply for a business service by selecting one of the service links from under one of the Business Service areas.

Certain services in the Request Access scheme are actually business service groupings i.e., multiple related services under one group heading. *Manage Mailing Activity* for example is a business service group, comprising individual components. Such services do not display individually on the Business Customer Gateway landing page, but display on the Business Customer Gateway user's homepage. The user's homepage (page when user is signed-in) will display the individual components that make up the Manage Mailing Activity. The display of individual services is intended to enable easier navigation. Refer to Figure 1 above.

The Manage Mailing Activity is a typical service for business customers; it comprises the following supporting functions:

- Balance and Fees *(PostalOne!)*
- Postal Wizard
- Electronic Data Exchange
- Mailing Reports *(PostalOne!)*
- Dashboard *(PostalOne!)*
- Manage Permits

The user's homepage (user is already signed-in) will display the individual services that make up the Manage Mailing Activity group. If a (signed-in) user selects a service, but is not set up or approved for that service, the system prompts this user to add that service. Most services under the new Gateway system require approval for access.

Once the user has consented to the Privacy Act and has checked the *Yes* radio button (Figure 17), the Select a Business Service screen appears (Figure 18). To add a service, the user can either type in the service (then click the Submit button), or click a service link from under one of the business areas. A user can also search for a service by selecting a filter from the (Locate Service) dropdown menu (then click the Submit button).

A user selects the desired service during the online process, and is limited to a single service per request. Multiple locations can be added to the service request, but the user must associate at least one business location to a service (Figure 19). If the service requires a Business Service Administrator (BSA) approval, the system will route the request to the BSA. If a BSA is not established in the system, the user will be asked whether she wishes to assume the BSA role. Refer to Section 2.7 for more information on the Business Service Administrator.

Once a user has a business account set up, and has previously requested a service or wishes to remain in the same session, the user can select the Request Access link to request additional services or additional locations for a service. The user in this case, would follow the same process as the new user requesting a service.

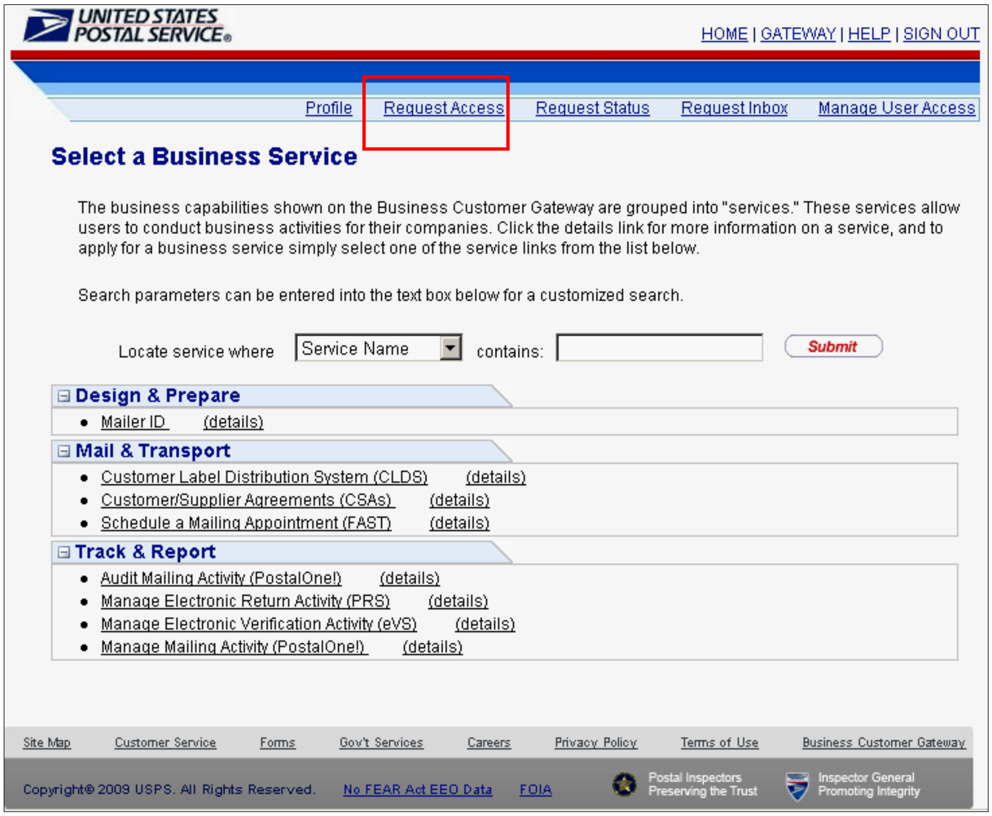


Figure 18: Selecting a Business Service

Once a service is selected, a user selects the business location they wish to associate to this service (Figure 19). Business locations previously entered will display and a user makes a selection by clicking the checkbox to the left of the location. If a user requires this service for locations that are not listed, the user can select the New Business location button to add additional business locations to the profile (Figure 20).

If the newly added location is significantly different from an address previously captured by the system, a new CRID may be assigned to that location

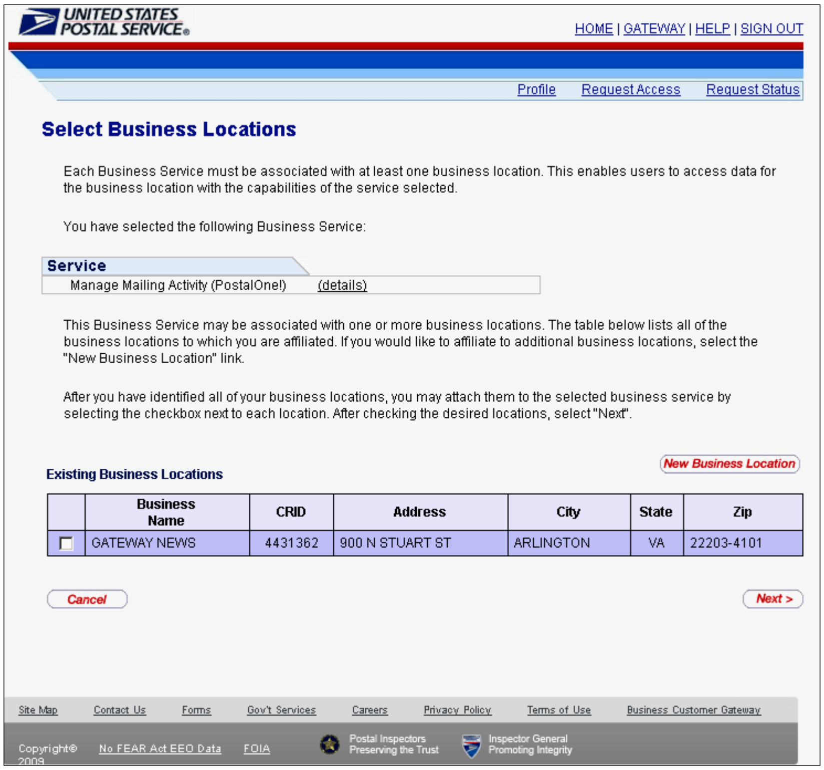


Figure 19: Associating the service to a business location

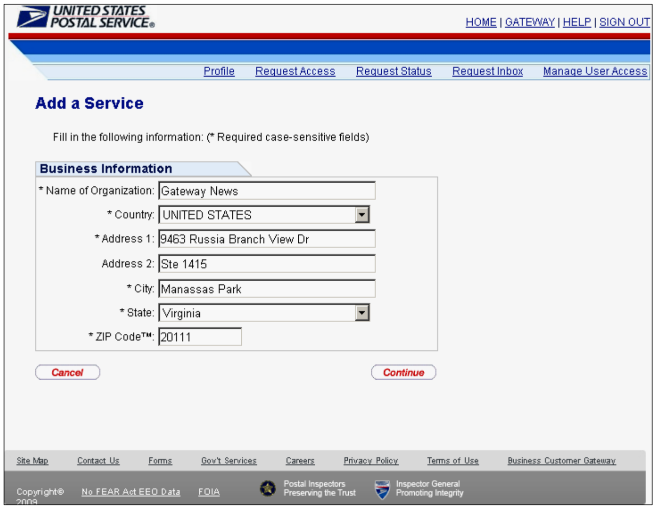


Figure 20: Entering an additional business location

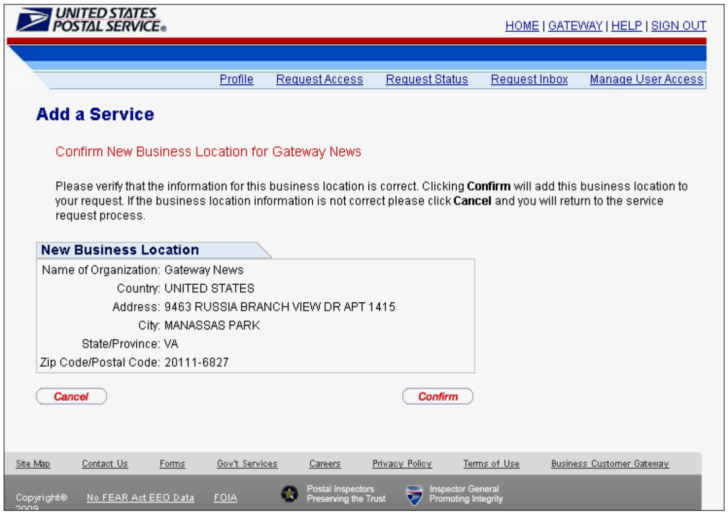


Figure 21: Confirming the additional business location

Upon the user selecting the *Continue* button, a confirmation page displays the location being added and the business location(s) for that service (Figure 21). Upon the user selecting the Confirm button, a confirmation page displays the service being requested and the business location(s) for that service (Figure 22).

The hardcopy Electronic Data Exchange / Participation agreement has been replaced by an electronic Terms & Conditions, click through agreement that the user accepts for the Business location (Figure 23).

A business customer should consider that the first user from its company who will request a service for a business location shall be the person that will assume the BSA role. If a service requires an Administrator, the system checks to see if a BSA has been designated. If there is no BSA designee, the user requesting the access will be notified of the BSA requirement and will be prompted to assume the BSA role (Figure 24). If the user agrees to become the BSA, the process continues. If the user declines, the request for service access will go into a pending status until the BSA role is assumed for this service at the business location. The request is held in pending status, after which it will be purged if it is not approved within 25 days of the initial request.

A BSA also has the option to assign additional approved users to the BSA role for other locations.

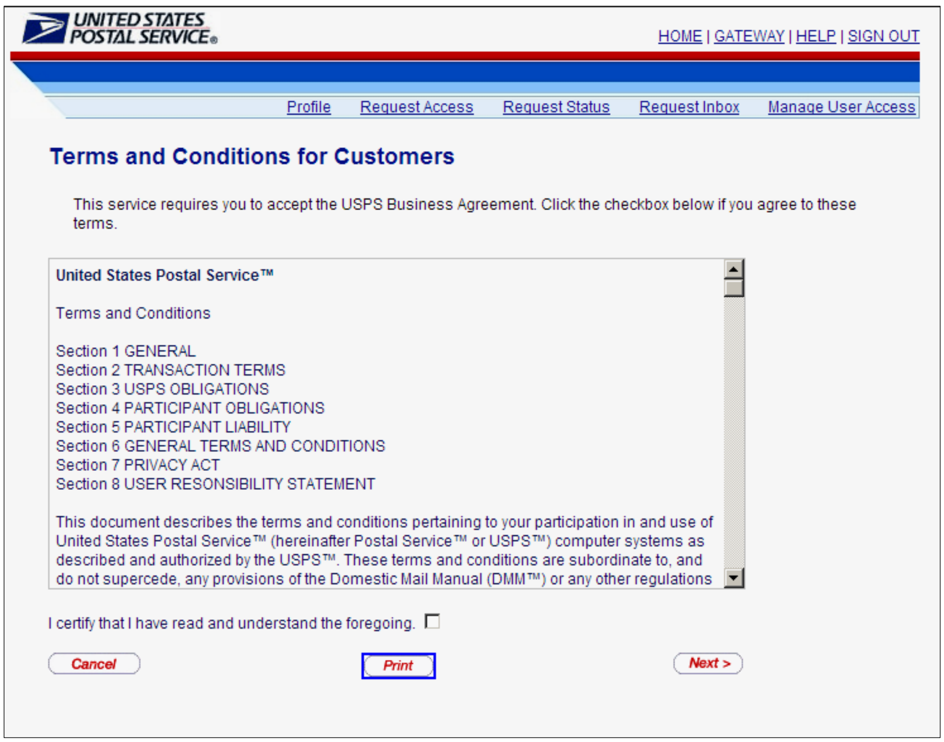


Figure 23: Electronic Terms and Conditions click through agreement

Figure 24: Business Service BSA role option

Note: The former External Site Administrator role in the previous *PostalOne!* system transferred to the BSA role. For continuing customers with locations where no External Site Administrator was assigned, when a new user requests access to this same service and location, this user will be notified of the BSA requirement.

If the user elects to assume the BSA role, the statement certification box must be checked, indicating the user consents to the BSA Agreement. The BSA designation is required before for the user will be granted access to the service. The user is prompted to select the appropriate button: *No Thanks* (takes user to a Permissions Pending Screen – Figure 25). The Request Status screen appears when there is a BSA designated; *Yes* (takes user to the BSA Agreement – Figure 24).

The user can also print the BSA agreement. If the user clicks the Cancel button, the system directs the user to the user's homepage. If the user clicks the Next button, the system will record the business service within the user's account profile and then takes the user back to Request a Business Service page where the user can request additional services.

The user will receive confirmation via email from the USPS of the Business Service Administrator status for the service at the requested location (Figure 28). A user can check the status of a request for access by clicking the Request Status link (Figure 26).

The user who declines the BSA role will receive an auto-generated email communicating the pending status request of the service request (Figure 27). The request will be placed in pending, until a BSA is designated or the assigned BSA responds to the user's request for service and/or access.

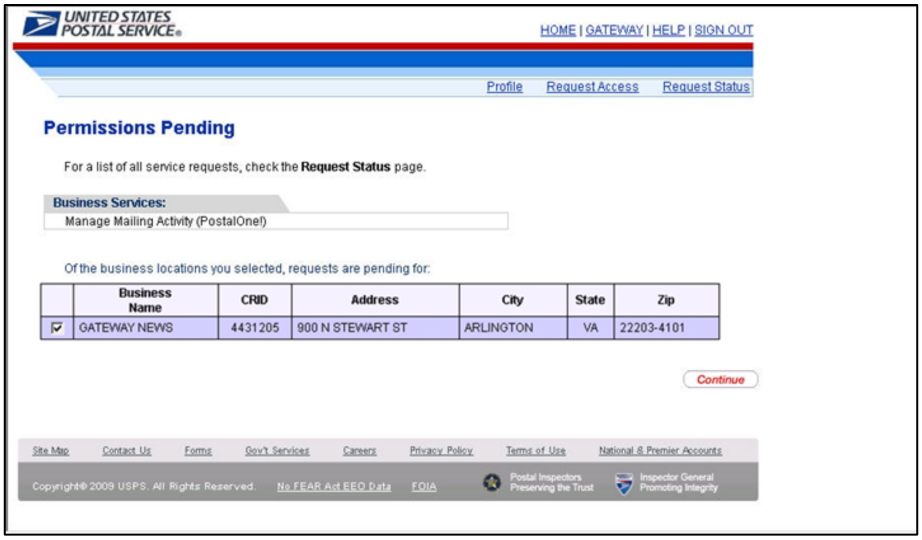


Figure 25: The request is placed in the pending queue without a BSA designated

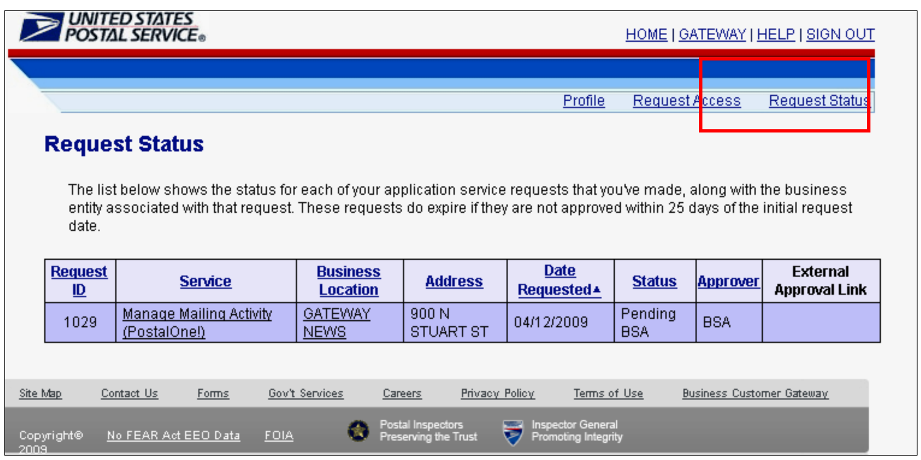


Figure 26: Non-BSA clicks Request Status link

User receives email confirmation of pending status for the Service at the requested location(s) and a follow-up email when request is approved or denied:

Your request for the following services and business location is pending:

Service(s):
Manage Mailing Activity (PostalOne!)

Business Location:
GATEWAY NEWS 900 N STUART ST ARLINGTON VA 22203-4101

You will receive an email when it is approved or denied.

You can access your services from the Business Customer Gateway:

Figure 27: User receives pending status email confirmation if no BSA is assigned

Your request to be the BSA for the following services and business location has been approved by the application:

Service(s):
Manage Mailing Activity (PostalOne!)

Business Location:
GATEWAY NEWS 900 N STUART ST ARLINGTON VA 22203-4101

You can access your services from the Business Customer Gateway:

Figure 28: User receives email confirmation of Business Service Administrator status

2.8 Business Services Administrator Role and New User Status

In previous Postal Service applications where a company had multiple users, a Site Administrator was assigned to manage user access. This Site Administrator role has been replaced by the augmented Business Service Administrator (BSA) role.

The primary role of the BSA is to activate, deactivate and assign appropriate access, as well as to manage existing users' access and privileges. A BSA also sets up business profiles and establishes user-role-business entity assignments.

For certain business services, the BSA role will need to be filled before a service can be enabled. As a general rule, a BSA should be considered when a USPS customer anticipates multiple users for any one Gateway business service. Customers are therefore encouraged to assign the BSA role early in the process of setting up a business account through the Gateway.

The Gateway sign up process prompts the user who is first to request a business service and from a business location not currently captured by the Gateway to assume the BSA role. More than one BSA can be assigned within the umbrella of one company.

A new user who elects to assume the BSA role will receive an email confirmation of the BSA status (Figure 28). The BSA will have access to the user management functionality. The unit management feature is restricted to the Business Service Administrator role. The feature allows BSAs to manage the domain of users that are associated to their assigned business location(s). The screens that follow simulate the general flow for a BSA approving a new user for a service. Refer to Figure 29 through 33.

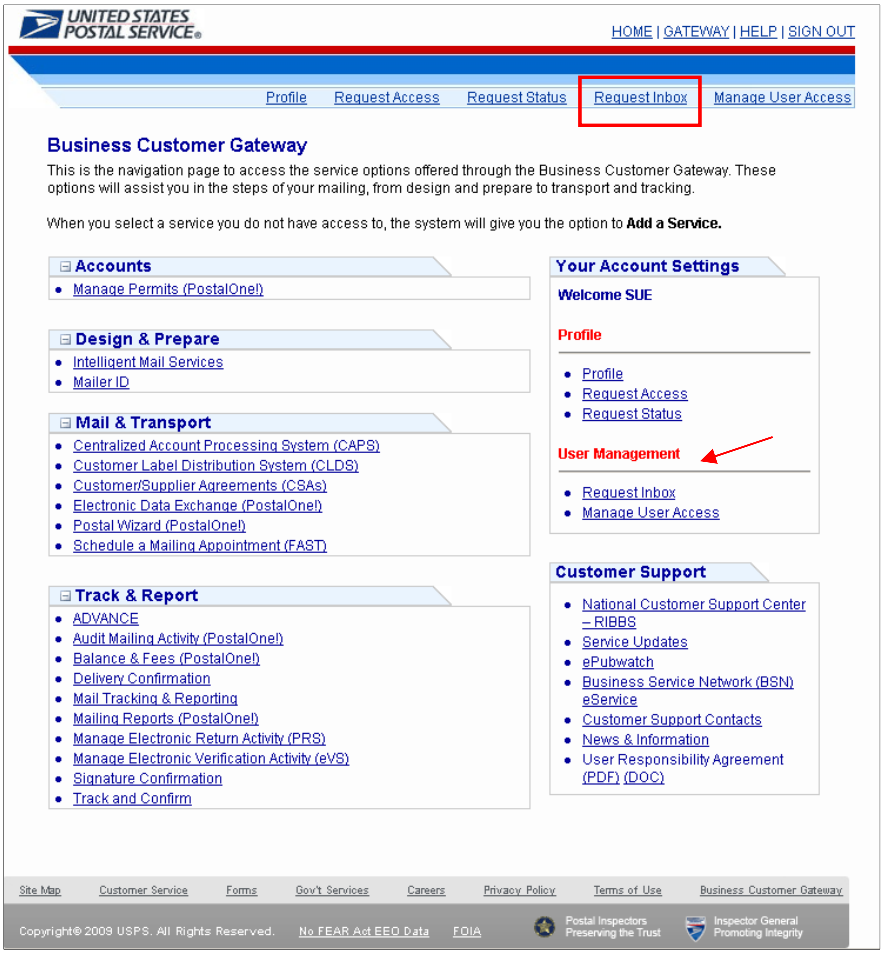


Figure 29: User Management functionality for BSAs Only

The Request Inbox displays all user access requests for which the BSA has the responsibility. The BSA selects a request by clicking the last name of the requester.

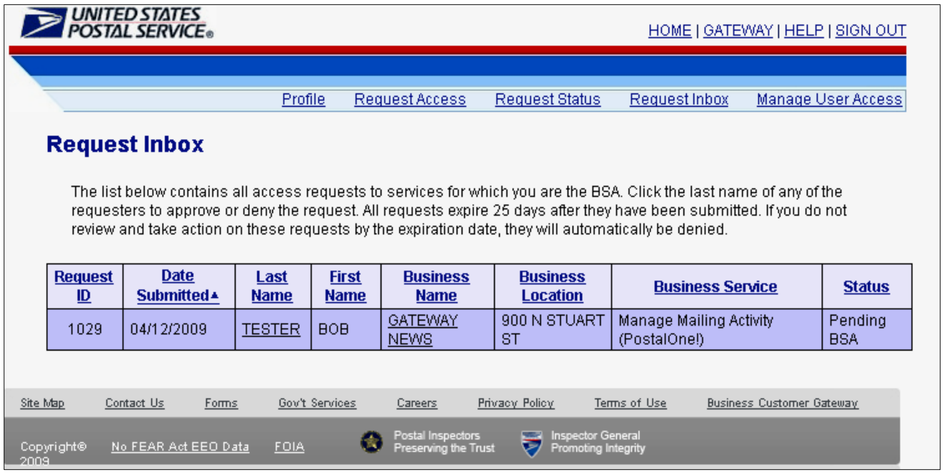


Figure 30: BSA Request InBox contains all Requests for Access to service(s)

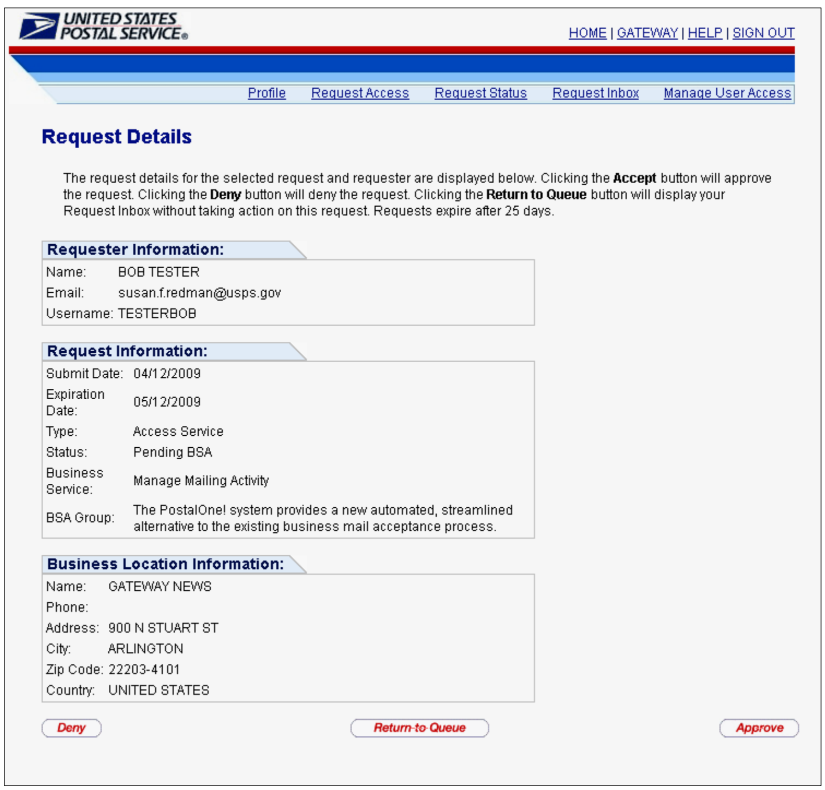


Figure 31: Request Details screen

When a BSA acts on a user request, the Request Details page displays (Figure 31). The BSA can ***Assign***, ***Revoke***, or ***Return to Queue*** (when no action is taken).

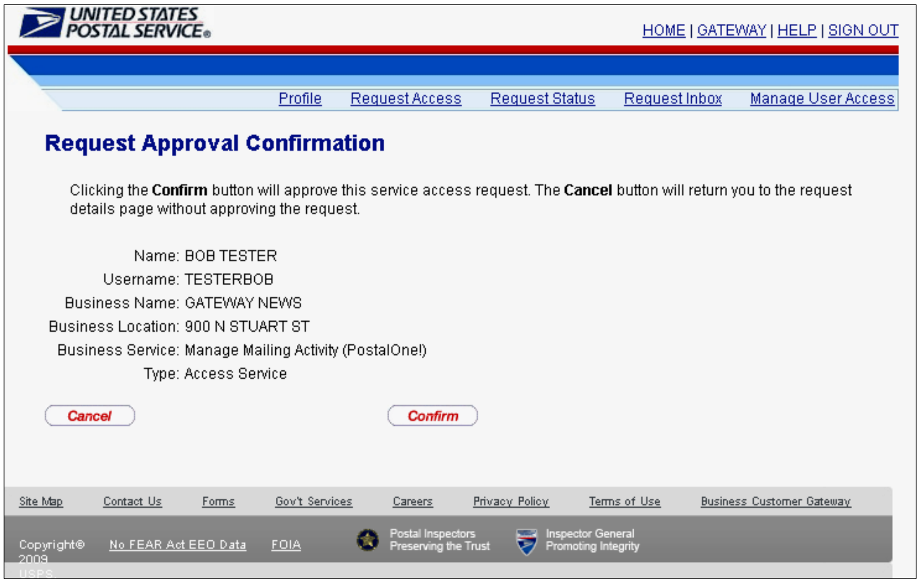


Figure 32: BSA Confirmation/Review screen

When an (Assign or Revoke) action is taken on a request, the BSA receives a confirmation screen to validate the action (Figure 32).

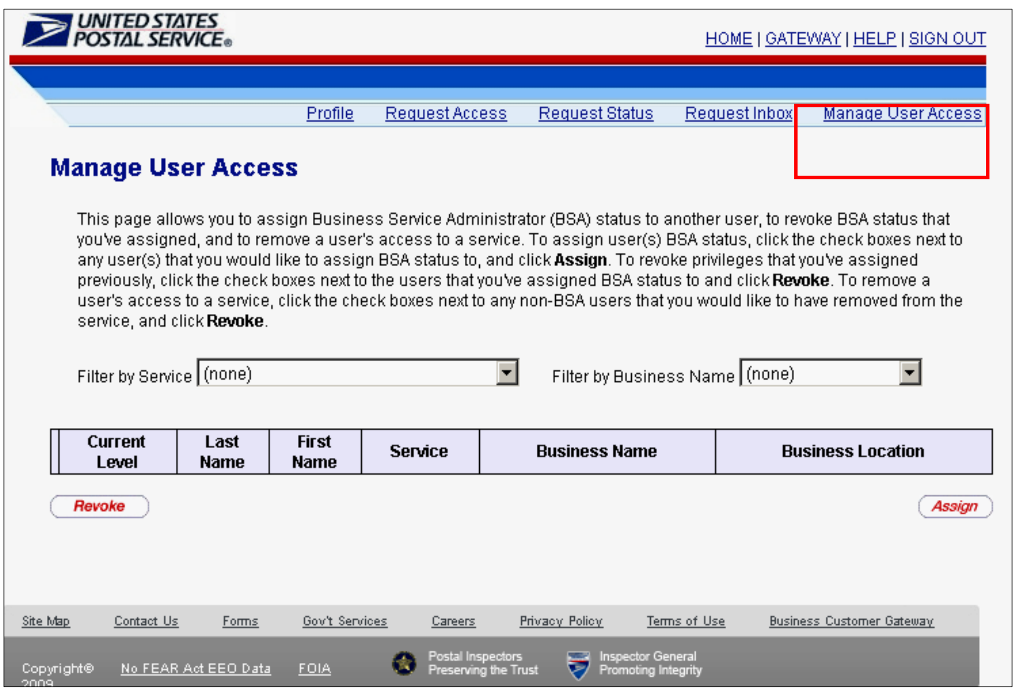


Figure 33: BSA User Access allow BSA to assign, revoke and designate additional BSA roles and access

The Manage User Access feature allows BSAs to assign or revoke the BSA role for other users (Figure 33). Such users must already have access to the service at the location for which the BSA is assigned.

3. Electronic Mailings Initial Set-up and Access

3.1 Mailer ID System

A Mailer ID (MID) is required in all Intelligent Mail. The MID is a field within the Intelligent Mail barcode that is used to identify Mail Owners and/or Mailing Agents or other service providers.

The MID system is designed and integrated with the Business Customer Gateway. The MID system is designed to manage the assignment and distribution of MIDs and the affiliation of customer Business Entities, as well as to configure MIDs for the enablement of electronic data exchange feedback such as Full-Service ACS, Start-the-Clock data, Confirm and other services.

In the initial release of the Business Customer Gateway, the Mailer ID System allows Mail Owners and Mail Preparers / Mailing Agents to request MIDs for their own use. In a future release, mail preparers, mailing agents or other service providers will be allowed to request and query for MIDs on behalf of Mail Owners or business entities. Additionally the Mailer ID System will be enhanced to allow users to look up their own or their mail owner's CRIDs.

3.1.1 Mailer ID Issuance and Exceptions

The Mailer ID system currently allows a Mailer to request five (5) six-digits and ten (10) nine-digit MIDs. Requests for more than five six-digit MIDs are considered an exception to the rule and must be requested through the Business Mail Entry Unit (BMEU) or Mailpiece Design Analyst (MDA) and forwarded to the Help Desk. All exception requests are handled by the Manager, Business Mail Acceptance, United States Postal Service Headquarters. Requests for additional MIDs must be submitted in writing, identifying the issue or justification for requesting additional MIDs and how they will be implemented into mailing processes.

Requesting Additional MID or Exceptions requires justification.

• Total mailing volume (per year)

• Number of mailing locations

• Total volume per mailing location (per year)

• Mailing cycles at locations (i.e. estimated total number of pieces within a 45 day period)

Exceptions require hard-copy application process and Business Mail Entry Unit involvement.

Similarly, a Mailing Agent can request a MID on behalf of a Mail Owner through the hard-copy application process. If a mailing agent is acting on behalf of a mail owner, the mail owner and mailing agent must read, complete and sign section 3b of the MID application which can be downloaded from RIBBS® Website at http://ribbs.usps.gov .

The customer must forward the MID Application to the Business Mail Entry Unit (BMEU) or the Mailpiece Design Analyst (MDA) for volume validation. Mailers can contact their local BMEU or Mailpiece Design Analyst (MDA), by accessing:
www.usps.com/nationalpremieraccounts/findlocators.htm (BMEU locator) or
www.usps.com/replymail/mailpiece.htm (MDA look-up tool

The BMEU representative or MDA will verify that the MID application is complete and validates the mailing volumes through the *PostalOne!* system, or other pertinent documentation provided by the applicant that demonstrates mailing volumes. The MID application information is forwarded to the *PostalOne!* Help desk who will issue the Mailer ID. For MID business rules and MID-related technical requirements, refer A Guide To Intelligent Mail For Letters and Flats and the Electronic Documentation.

3.1.2 Mailer ID Request Dispositions

When a user requests for a Mailer ID(s), the request is sent to the Customer Registration system for CRID and entity verification and then to the *PostalOne!* system for volume verification. When the account information is unverifiable, an exception process ensues and the request is routed to the Help desk to be worked with the BMEU personnel such that a decision or exception can be made.

MID requests can be completely approved, partially approved or rejected by the MID system (e.g., partially approved or rejected as in a request for seven 6-digit MIDs, the approval is for five 6-digit MIDs, and two MIDs' request are rejected). A MID request can be rejected because of conditions in violation of MID rules or limits. In such instances, a trigger for the Help Desk to get involved occurs.

3.1.3 Accessing the Mailer ID System

A user selects the *Mailer ID* link under the Design and Prepare section on the Business Customer Gateway landing page to request the *Mailer ID System* service (Figure 34). Refer to the section 2.6 on how to request access. For users who have been approved for access to the MID system, they can select the *Mailer ID* link from their homepage (Figure 35).

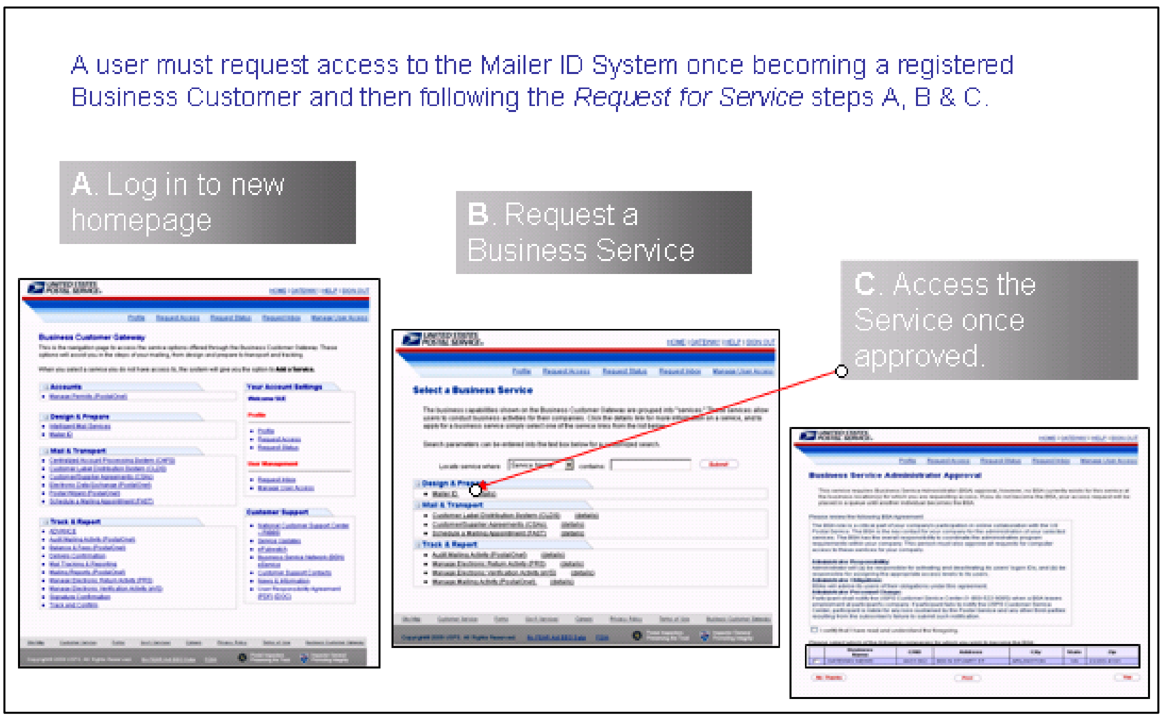
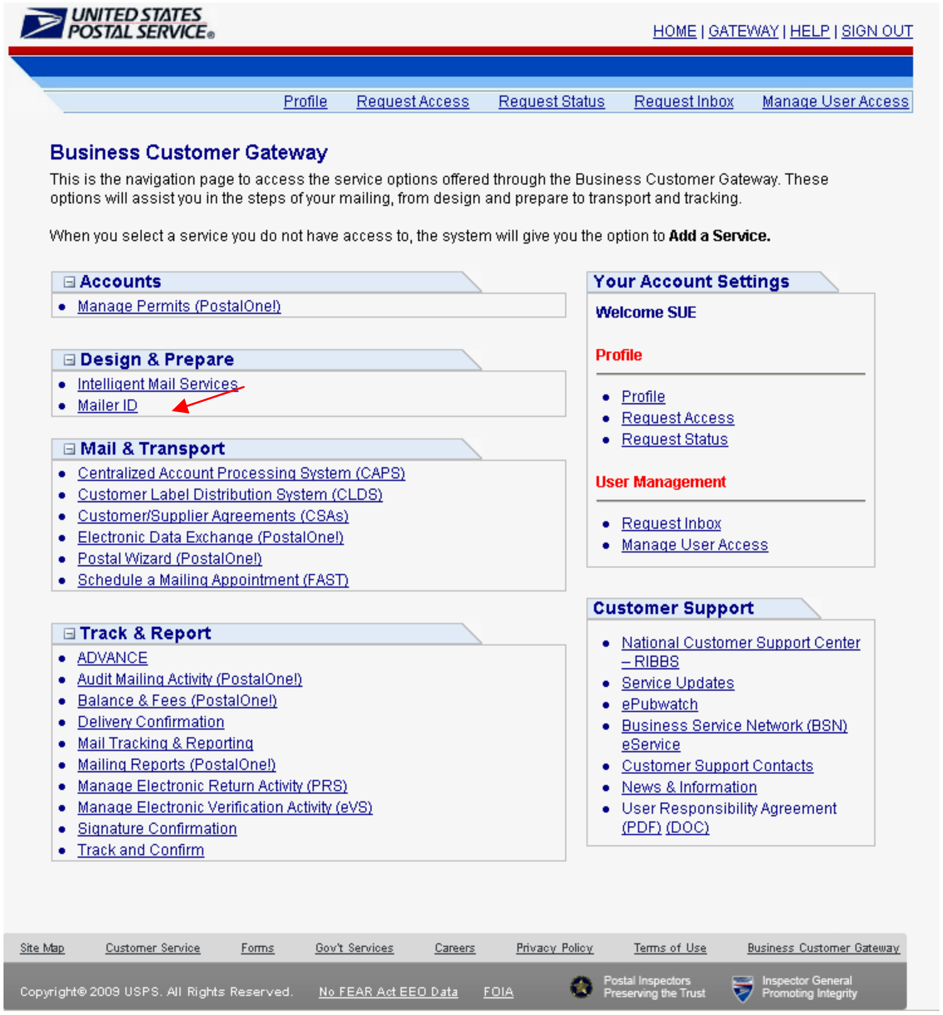


Figure 34: Accessing the Mailer ID System from the user's homepage

3.1.4 Navigating the MID System

Once the user has gained access to the Mailer ID service, the user will have access to the MID system (this assumes that a BSA has been designated for this service and the BSA had previously approved access for the user). The MID Summary page is the MID System landing page (Figure 36). This screen appears after the user selects the Mailer ID link. In this screen example, the (signed-in) user currently has a MID associated with its CRID. A user with no MIDs assigned will see a MID Summary indicating no Mailer IDs are associated to its CRID. The screens that follow demonstrate the general flow of a new user accessing the



Mailer ID system.

Figure 35: User accesses the Mailer ID System from Gateway homepage

3.1.5 The MID System Summary Landing Page

The MID system Summary landing page has several features and is described in the following sections.

1. Request/Apply a MID(s)
2. Invoke the Address Book Function
3. Edit a MID (program association e.g., Full/ Basic Service, OneCode Confirm)
4. Add or Edit a MID Profile (data distribution)
5. Invoke a Search by MID

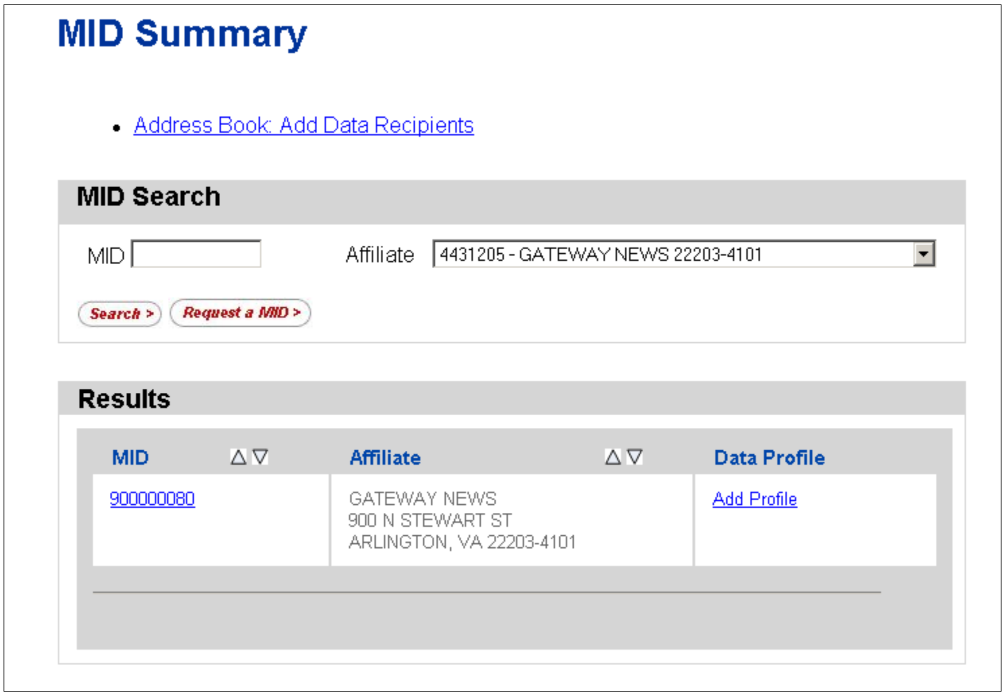


Figure 36: Mailer ID Summary page

3.1.6 Applying for a Mailer ID

The Apply for a MID screen appears when the user selects the Request MID button from MID Summary (landing) page (Figure 37). The user has the option to select a nine-digit numeric or a six-digit numeric MID from the dropdown menu (Figure 37) and can request the quantity of MIDs. The system assigns MIDs based on the USPS established business rules, largely driven by mail volume. For detailed information on the MID volume requirements and such, refer to A Intelligent Mail for Letters and Flats Guide, posted on RIBBS.

☑ <u>Volume rules for MIDs</u>

9 digit Mailer ID

✓ 1^{st} MID can be obtained without (Mailer) volume verified

✓ 2^{nd} MID and additional MIDs require 1 million pieces with volume verified per MID request

6 digit Mailer ID

✓ 1-5 MID requires 10 million pieces per MID with volume verified

☑ <u>Quantity rules for MIDs through the Mailer ID System</u>

9 digit Mailer ID

✓ ten (10)

6 digit Mailer ID

✓ five (5)

☑ <u>The MID system logic in assigning MIDs are a function of the MID issuance rules</u>. [1]

1. number of MIDs currently owned and the MID usage within the mailing supply chain
2. annual piece count of the associated CRID
3. possible customer overrides to Global Parameters for Maximum number of MIDs
4. required volume for initial/additional MIDs

[1] *See also Exception Process in the section below **

☑ <u>Mailer ID requests can be for any of the following (refer to Figure 37 and 38)</u>:

- ✓ request a 6 digit Mailer ID
- ✓ request a 9 digit Mailer ID
- ✓ request a specific Mailer ID
- ✓ request an auto-generated Mailer ID (customer does not know what he/she is eligible for and lets the system decide)
- ✓ request the number of MIDs

☑ <u>Mailer ID can be used for any of the following programs (refer to Figure 38):</u>

- ✓ request Mailer IDs for Full/Basic Service, Full-Service One CodeACS, One CodeACS with One Code CONFIRM, and One Code Confirm,

The user enters the quantity of requested MIDs, and then selects the *Request MID* button. If the user selects *the Cancel* button, the user is redirected to the MID Summary screen (Figure 36).

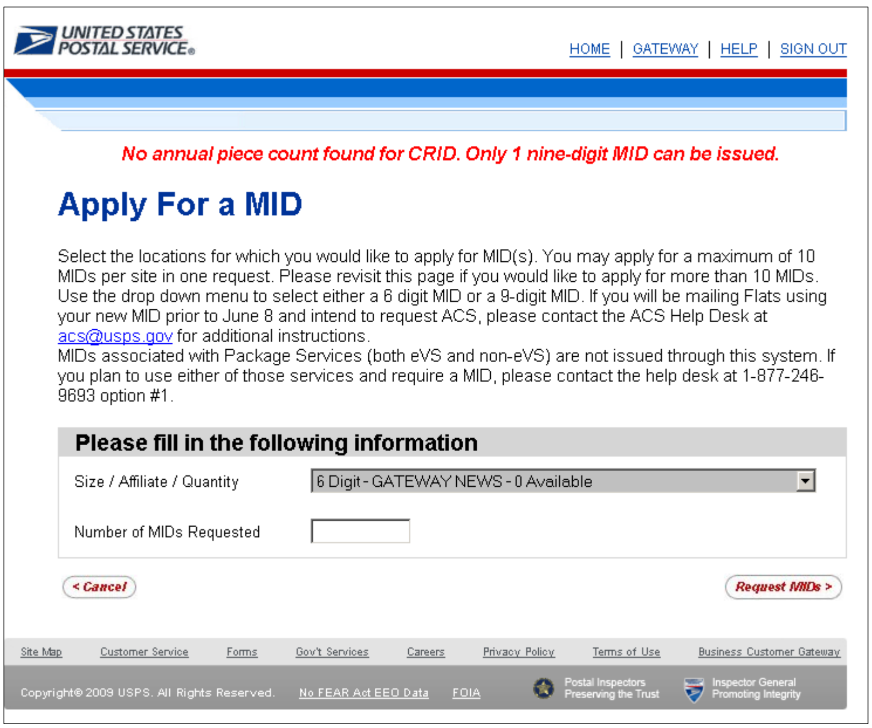


Figure 37: Applying for a MID

Mailer IDs for the Electronic Verification System (eVS), Product Return Service (PRS) and other Package Services programs are not issued through the Mailer ID System. MIDs for these programs are handled through the process independent of the Gateway. Mailers who are interested in these programs are advised to continue to contact the Help Desk at 877-246-9693, option 1.

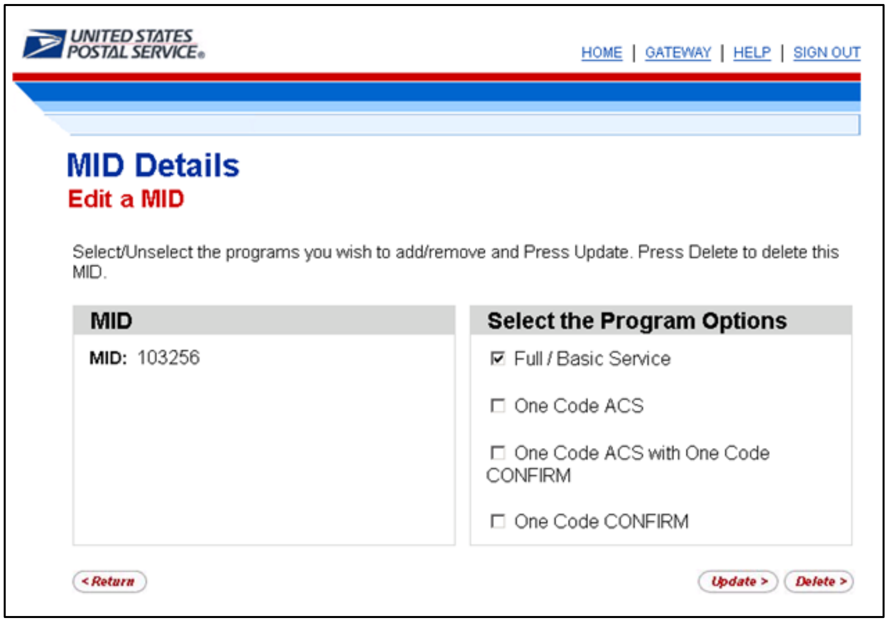


Figure 38: Mailer ID Detail page

The MID Application Details screen appears (Figure 38) when the user selects the *Request* MID button from Apply for a MID page. The user must select at least one application for which the assigned MID will be used. There are four possible applications.

- Full / Basic
- One Code ACS
- One Code ACS with One Code Confirm
- One Code Confirm

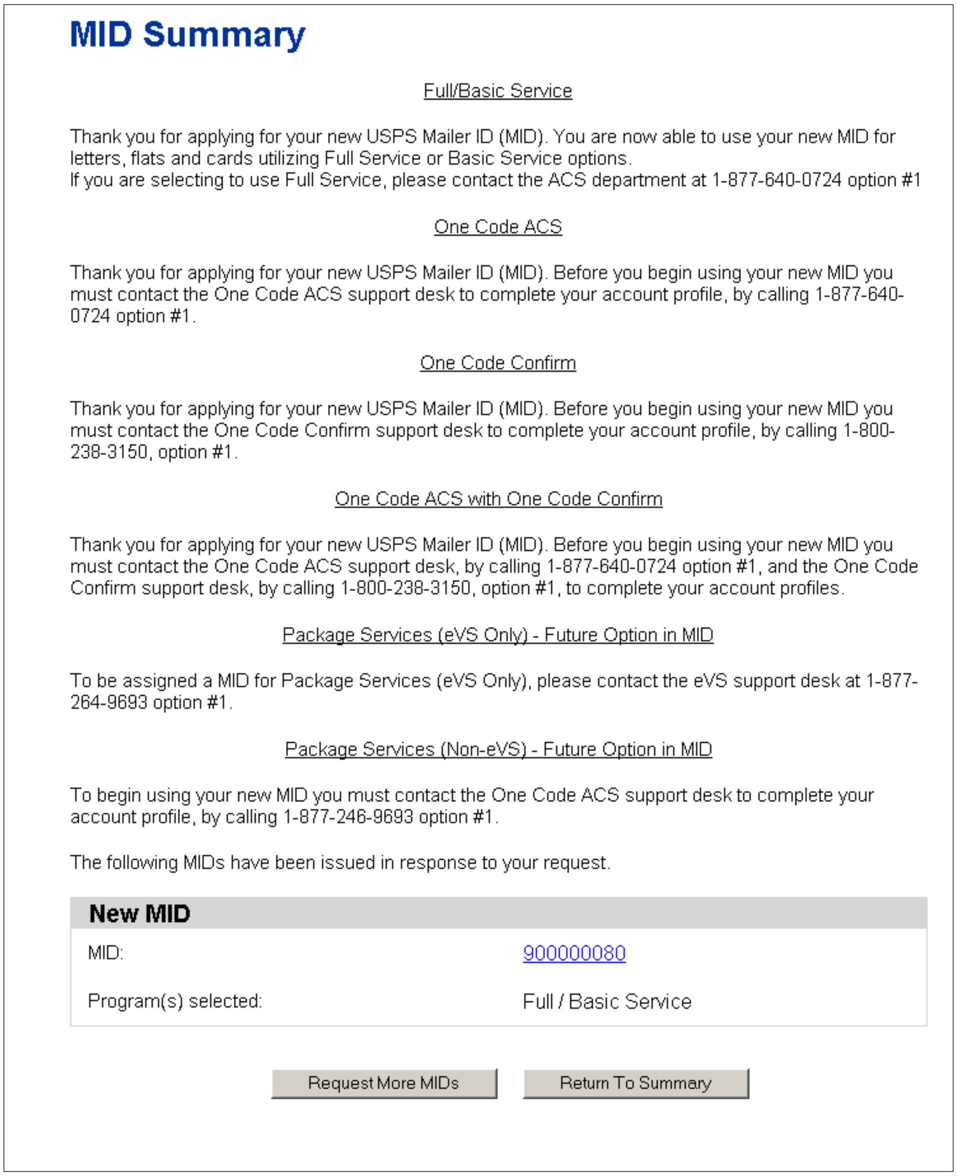
A user can elect to have the MID automatically generated, or request to have a particular MID assigned. The user can also request the quantity of MIDs to be assigned, and then selects the *Request MIDs* button. The MID Summary Screen appears when the user selects the *Request MIDs* button from Apply for a MID page (Figure 39).This screen displays the MID(s) that the system created. When the user receives a new MID, the MID Summary page displays with instructions on how to proceed with using Mailer IDs for which the MID has been associated. The user's new MID assignment(s) is shown at the bottom of the Summary page along with the program(s) that were selected to associate with it. The user can continue requesting additional MIDs or return to the MID Summary (landing) page.

3.1.7 Mail ID Profile

From the MID Summary (assign) screen (Figure 39), a user has the ability to edit a MID profile by selecting the MID hyperlink-enabled number (if the number is not hyperlinked, it means the MID has been delegated). If the user selects the MID number, the system displays the Mail ID Details page, edit mode (Figure 41).

The user has the option to add or remove an application(s) using the *Update* button, or Delete an application(s) associated to this MID (the system places this MID in an "inactive" status in this case).

If a user selects the *Return* button, the system redirects the user to the MID Summary (assign) screen (Figure 36) without making updates or changes.



MID Summary

Full/Basic Service

Thank you for applying for your new USPS Mailer ID (MID). You are now able to use your new MID for letters, flats and cards utilizing Full Service or Basic Service options.
If you are selecting to use Full Service, please contact the ACS department at 1-877-640-0724 option #1

One Code ACS

Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID you must contact the One Code ACS support desk to complete your account profile, by calling 1-877-640-0724 option #1.

One Code Confirm

Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID you must contact the One Code Confirm support desk to complete your account profile, by calling 1-800-238-3150, option #1.

One Code ACS with One Code Confirm

Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID you must contact the One Code ACS support desk, by calling 1-877-640-0724 option #1, and the One Code Confirm support desk, by calling 1-800-238-3150, option #1, to complete your account profiles.

Package Services (eVS Only) - Future Option in MID

To be assigned a MID for Package Services (eVS Only), please contact the eVS support desk at 1-877-264-9693 option #1.

Package Services (Non-eVS) - Future Option in MID

To begin using your new MID you must contact the One Code ACS support desk to complete your account profile, by calling 1-877-246-9693 option #1.

The following MIDs have been issued in response to your request.

New MID

MID:	900000080
Program(s) selected:	Full / Basic Service

Request More MIDs | Return To Summary

Figure 39: MID Summary (review)

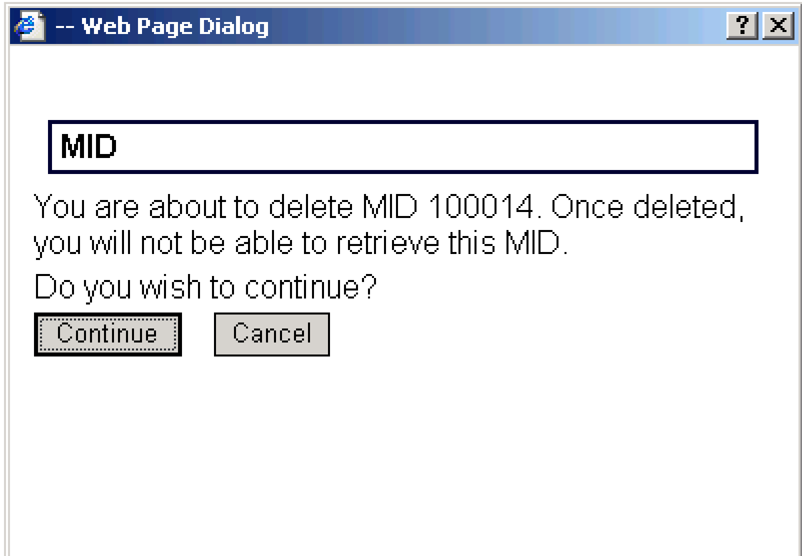


Figure 40: MID deletion pop-up warning

Before the system executes the Delete function, a warning pop-up screen appears where the user has the option to *Continue* or *Cancel* (Figure 40). If the user selects the Continue button, the MID Details confirmation screen appears (Figure 41).

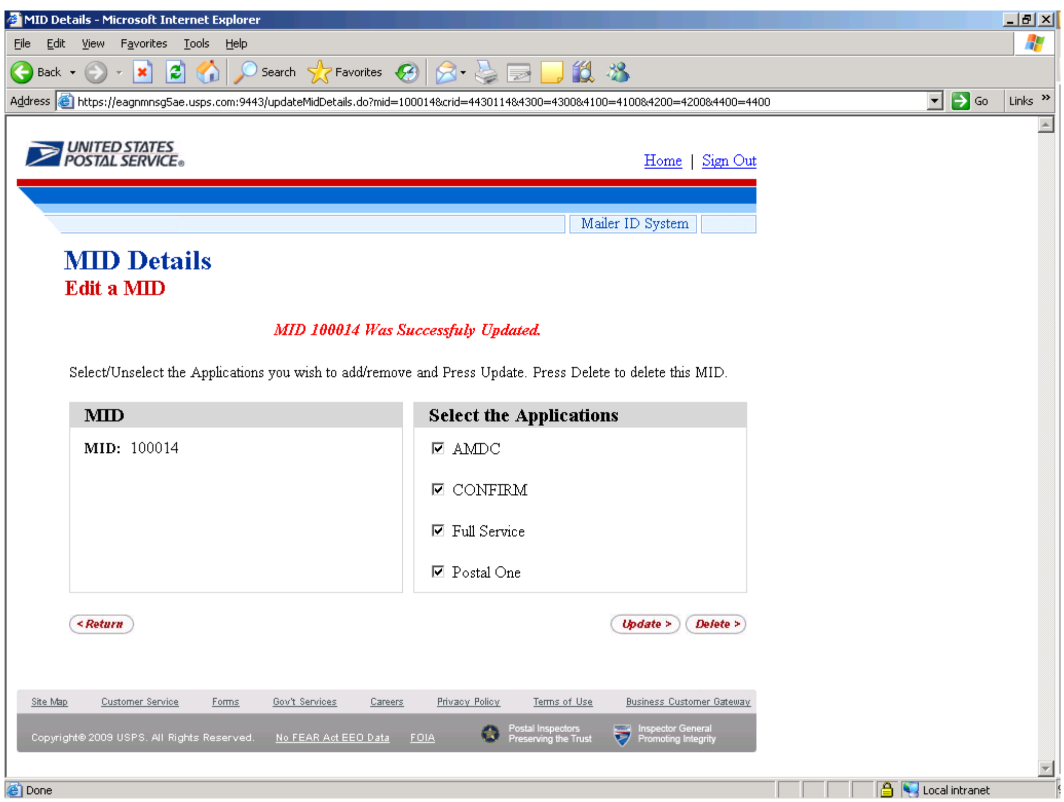


Figure 41: Mailer ID Details page (edit mode) - update confirmation

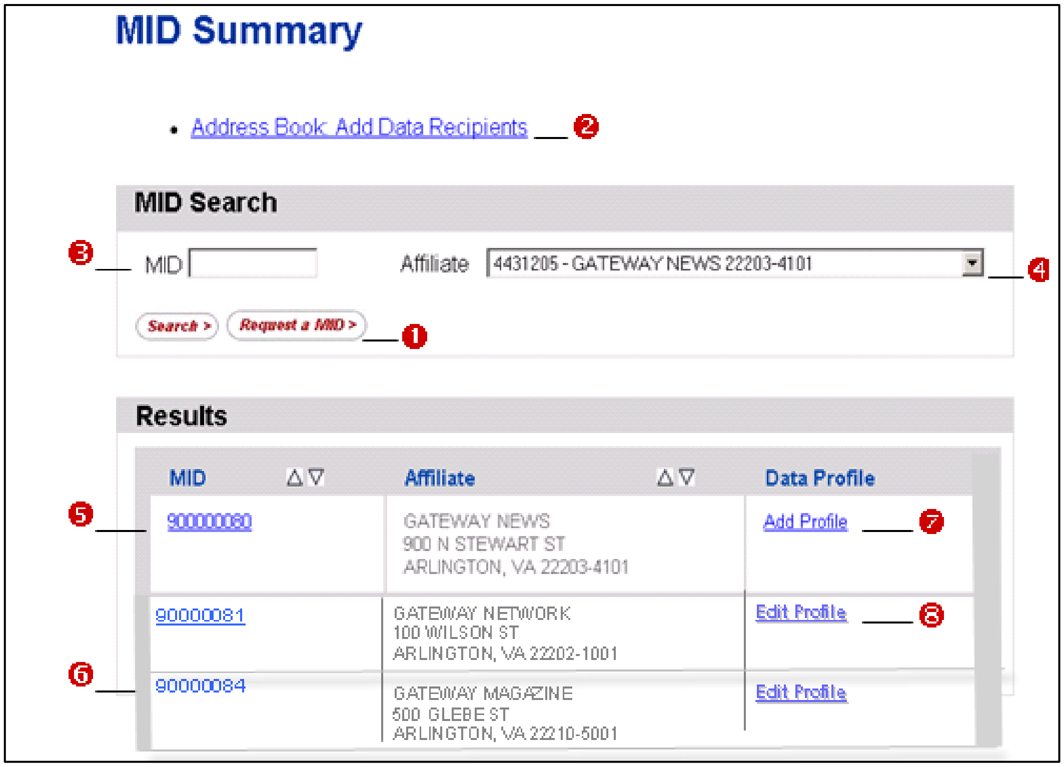


Figure 42: Mailer ID Summary page

3.1.8 Mail ID Profile

A user has the ability to create a Mailer ID Data Recipient Profile by selecting the ***Add Profile*** (from the Mailer ID Summary page) or *Remove **MID Profile*** (from the Mailer ID Data Recipient profile). If the user selects the *Edit Profile* hyperlink under the Profile Type section From the MID Summary screen (Figure 42), the system displays the Mailer ID Data Recipient Profile page (Figure 42). This page is long, requiring the user to use the scroll bar. Figure 42 below shows the upper section of the MID Profile page.

The Mailer ID Summary Overview (refer to Figure 42)

❶ **Request a Mailer ID.** Takes the user to the Apply for Mailer ID page (Figure 42). User applies for a MID from this *Request for a MID* button. See the section above on Applying for a Mailer ID.

❷ **Address Book.** Takes the user to the Address Book feature. User starts the data recipient creation from this link. See the section below on Mailer ID Address Book.

❸ **MID Search.** Allows the user to enter a MID for which to search. MIDs that match the search criteria are displayed as links when the searching user is the MID Owner. The link will take the user to the Mailer ID Details edit page (Figure 38 and 41).

❹ **Affiliate Dropdown Menu.** Allows the user to select a company for which to view a MID(s). The list of companies is derived from the user's CRID profile as captured/identified by the Gateway customer registration system. All company CRIDs associated to the user which has a MID privilege or role is listed.

❺ **Mailer ID Affiliate** (per Search Results). Any MIDs matching the search criteria are (results) displayed as links when the searching user is the owner of the MID (or if the searching user is the delegate of the MID). If the MID has been delegated, the user performing the search will not see a link. If the user selects the MID hyperlink, the Mailer ID Detail page appears (Figure 41).

❻ **Mailer ID Affiliate (delegated)** (per Search Results). Any MIDs matching the search criteria are displayed. If the MID is delegated, the link is disabled.

❼ **Add Profile.** Allows the user to create a MID profile. When a profile does not exists for the MID, the user can select the link and be taken to the Mailer ID Data Recipient Profile page, top section, where the user can set-up a MID profile (Figure .42).

❽ **Edit Profile.**)Allows the user to perform data distribution for the corresponding MID. When a profile exists for the MID, the user can select the link and be taken to the Mailer ID Data Recipient Profile page to associate to a service e.g., Full-Service ACS, Confirm and Start-the-Clock (Figure .43, 44, and 45).

3.1.9 Mailer ID Delegation

In the Mailer ID Data Recipient Profile top section, the user can elect to delegate a MID. If the user elects to delegate a MID to an affiliate (selects from Delegate dropdown and checks the Delegate checkbox) the remaining portion of the screen becomes disabled as it (MID) can then only be updated by the selected delegate. The dropdown (delegatee) options are all active entries in the user's Data Distribution list, entries extracted from the (signed-in) user's Address Book. Refer to the Address Book section below.

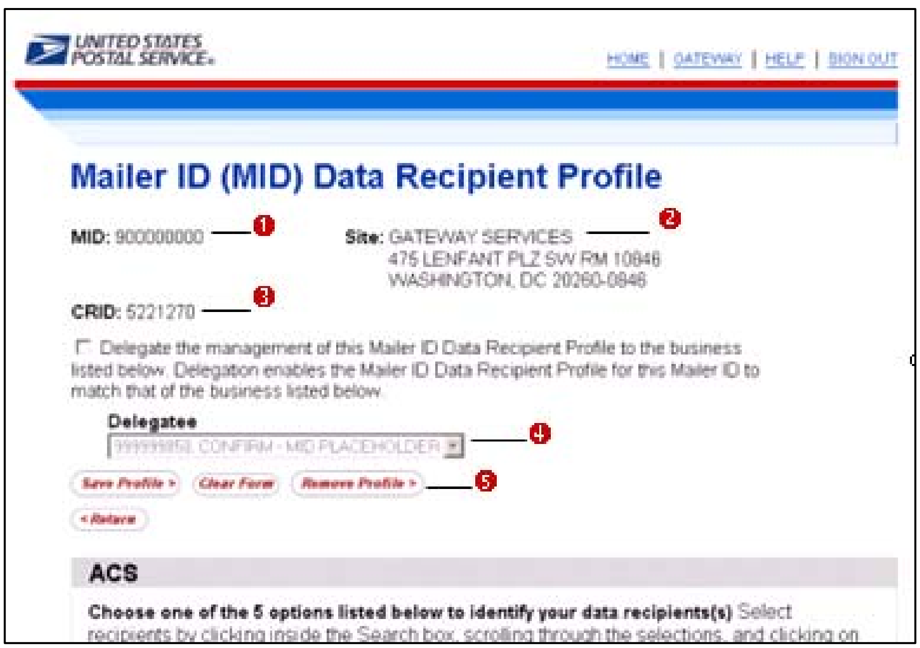


Figure 43: Mailer ID Data Recipient Profile - Delegation

The Mailer ID Data Recipient Profile - Delegation Overview (refer to Figure 43)

❶ **Mailer ID.** The Mailer ID for which the profile will be set-up.

❷ **Site Address.** The business entity name and address for which the MID was created and as captured during the gateway account set-up.

❸ **Delegate Checkbox.** Allows the user to delegate the (displayed) MID by selecting the checkbox. An entire MID is delegated, not individual data types. Selecting the checkbox disables all fields in the data recipient sections.

❹ **Delegatee Dropdown Menu.** Allows the user to select from the list of all active entries in the user's Data Distribution list.

❺ **Remove Profile Buttons.** Allows the user to remove a profile. Depending on the mode, different buttons will appear beneath this button:

During Profile Create-mode by a MID owner, the buttons will display as "CREATE MID" and "CLEAR FORM"

During Profile Edit-mode by a MID owner, the buttons will display as "UPDATE PROFILE" and "CANCEL UPDATE" AND "DELETE PROFILE"

During Profile Edit-mode by a delegatee, the buttons will display as "UPDATE PROFILE" and "CANCEL UPDATE" AND "DELETE PROFILE"

3.1.10 Mailer ID Data Distribution

A user can select an existing data recipient or add a new data recipient for Full-Service ACS. If the user elected to delegate this profile the remaining portion of the screen is disabled. A user can perform MID profile updates by using radio buttons and selecting a delegate from dropdown menu, then select the "UPDATE PROFILE" button. Refer to Mailer ID Delegation section above.

Each independent section for each service (e.g., Full-Service ACS, Confirm and Start-the-Clock) to associate to the MID will be described in the section below. There are five options for Full-Service ACS data distribution (Figure 44).

Full-Service ACS

- No Full-Service ACS data distribution (selecting the radio button causes no data distribution profile to be set-up for Full-Service ACS),
- Send the Full-Service ACS data to the Preparer of the mailing (allows the user to select one or more from the recipients list, selecting the radio button creates a *static profile-Preparer* for Full-Service ACS)
- Send Full-Service ACS data to the holder of the MID on the mailing (selecting the radio button creates a *static profile-MID on Piece* for Full-Service ACS)
- Send Full-Service ACS data to Other-Single Recipient (allows the user to select one data recipient, selecting the radio button creates a *static profile-Complete* for Full-Service ACS)
- Send Full-Service ACS data to Other – Multiple Recipient(s) (allows the user to select one or more data recipient, selecting the radio button creates a *dynamic profile-Complete* for Full-Service ACS). The recipient multi-select box displays all active entries in the user's data distribution list. When editing recipients, the previously selected recipients are highlighted.

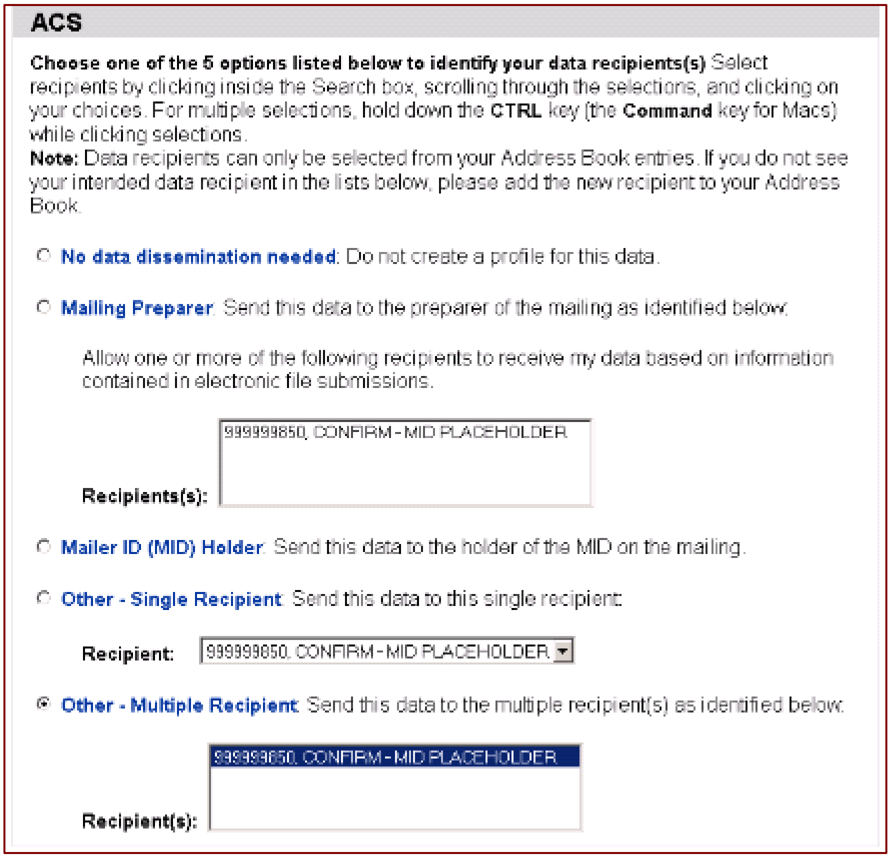


Figure 44: Full-Service ACS data distribution to recipient

Confirm

A user can select an existing recipient or add a new recipient for the Confirm service. A user can make selections by using radio buttons and selecting from dropdown menus. There are four options for Confirm data (Figure 45).

- No Confirm data distribution (selecting the radio button causes no data distribution profile to be set-up for Confirm),
- Send the Confirm data to the Preparer of the mailing (allows the user to select one or more from the recipients list, selecting the radio button creates a *static profile-Preparer* for Confirm)
- Send Confirm data to Other-Single Recipient (allows the user to select one data recipient, selecting the radio button creates a *static profile-Complete* for Confirm)
- Send Confirm data to Other – Multiple Recipient(s) (allows the user to select one or more data recipient, selecting the radio button creates a *dynamic profile-Complete* for Confirm). The recipient multi-select box displays all active entries in the user's data distribution list. When editing recipients, the previously selected recipients are highlighted.

The radio button "Send this data to the holder of the MID on the mailing" should not be used and is not supported for Confirm data distribution.

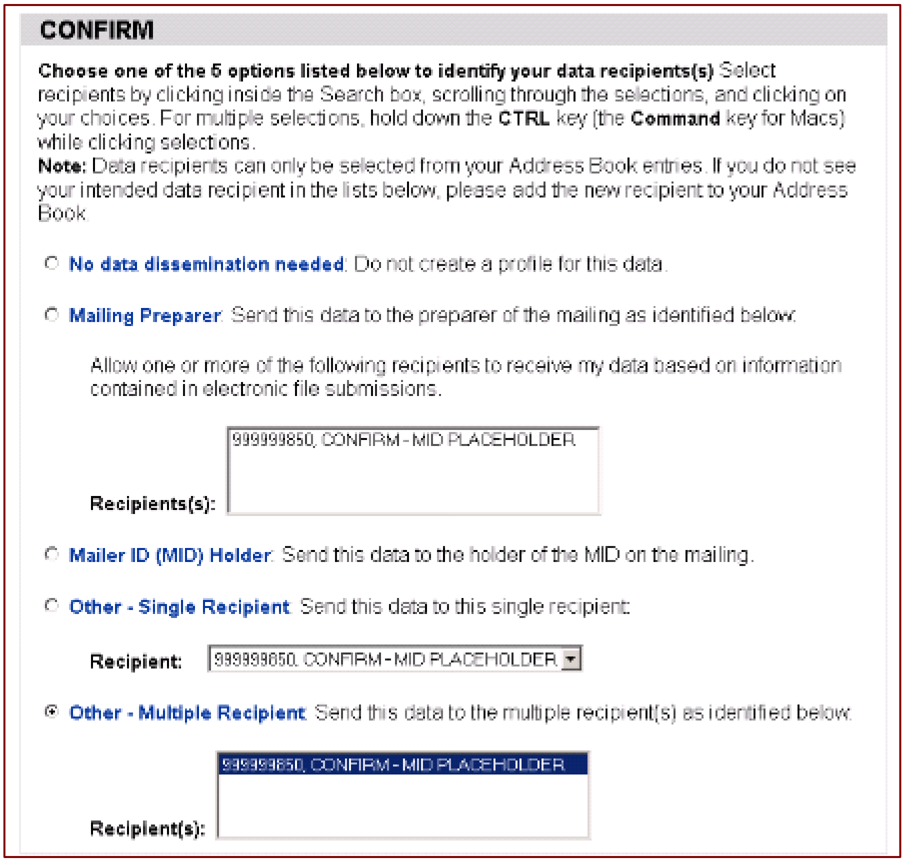


Figure 45: Confirm data distribution to recipient (middle of Profile edit page, using scroll bar)

Start-the-Clock

A user can select an existing recipient or add a new recipient for the Start-the-Clock service. A user can make selections by using radio buttons and selecting from dropdown menus. There are four options for Start-the-Clock data (Figure 46).

- No Start-the-Clock data distribution (selecting the radio button causes no data distribution profile to be set-up for Start-the-Clock),
- send the Start-the-Clock data to the Preparer of the mailing (allows the user to select one or more from the recipients list, selecting the radio button creates a *static profile-Preparer* for Start-the-Clock)
- send Start-the-Clock data to Other-Single Recipient (allows the user to select one data recipient, selecting the radio button creates a *static profile-Complete* for Start-the-Clock)
- send Start-the-Clock data to Other – Multiple Recipient(s) (allows the user to select one or more data recipient, selecting the radio button creates a *dynamic profile-Complete* for Start-the-Clock). The recipient multi-select box displays all active entries in the user's data distribution list. When editing recipients, the previously selected recipients are highlighted

The radio button "Send this data to the holder of the MID on the mailing" should not be used and will not be supported for Start-the-Clock data distribution.

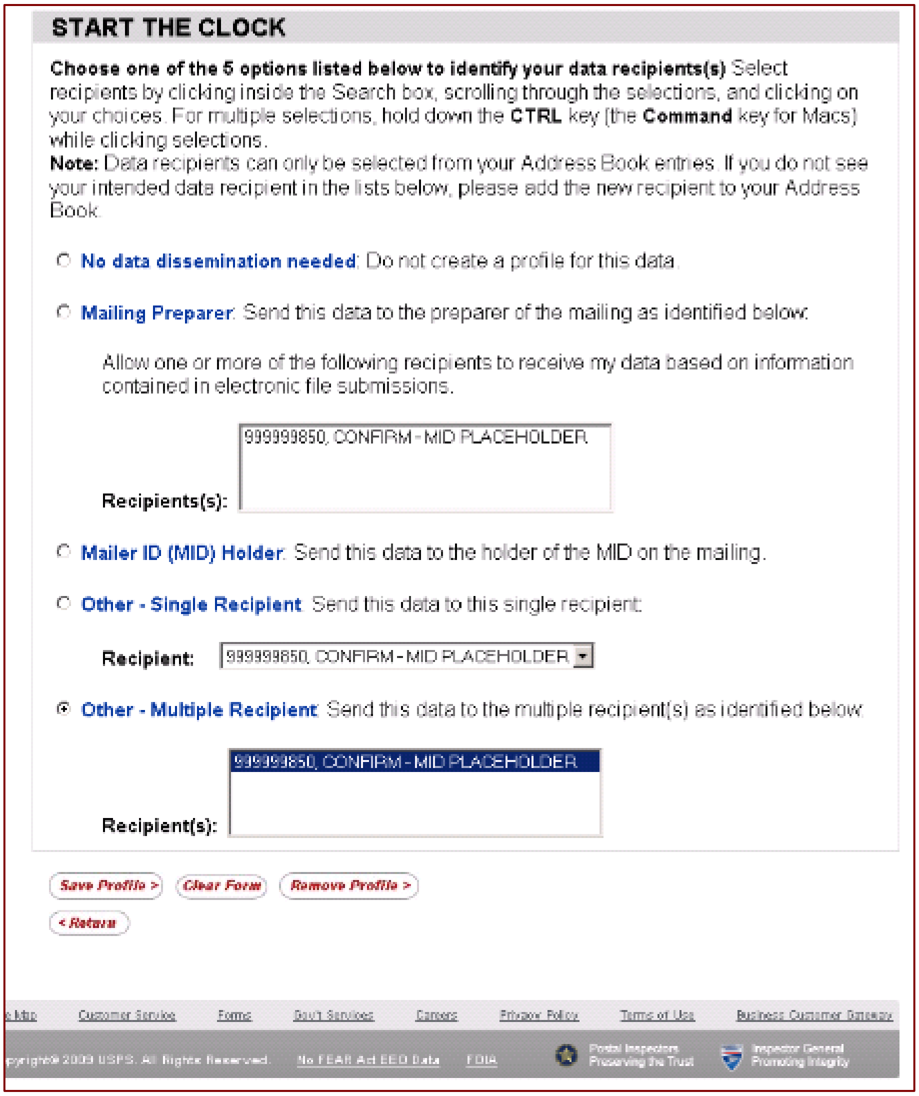


Figure 46: Start-the-Clock data distribution to recipient (bottom of MID profile edit page)

3.1.11 Mailer ID Address Book

The Address Book screen appears when the user selects the *Address Book* link from the MID Summary page. The Address Book feature allows a user to maintain a list of Mailer ID data recipients. Refer to Figure 47.

A users has the option to enter a MID and the system will display a pop-up (below) to verify the recipient to be added. At this point, the user can add the entry to the Address Book by clicking the *Continue* button or by Clicking the *Cancel* button. Refer to Figure 48.

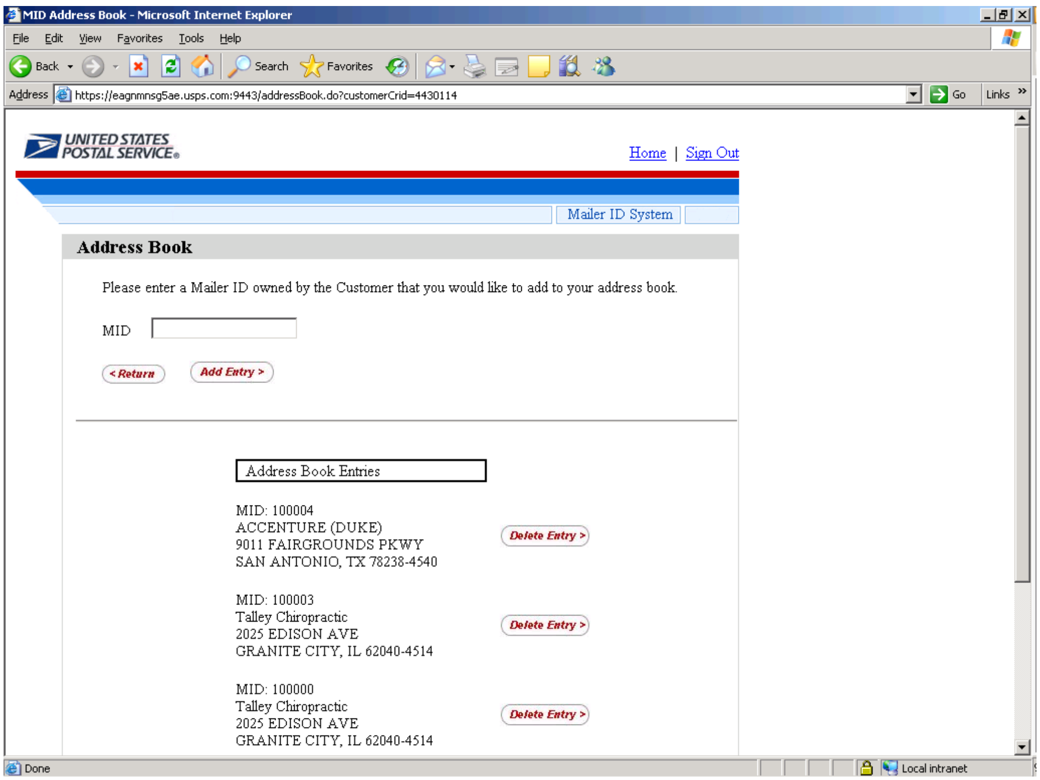


Figure 47: Address Book

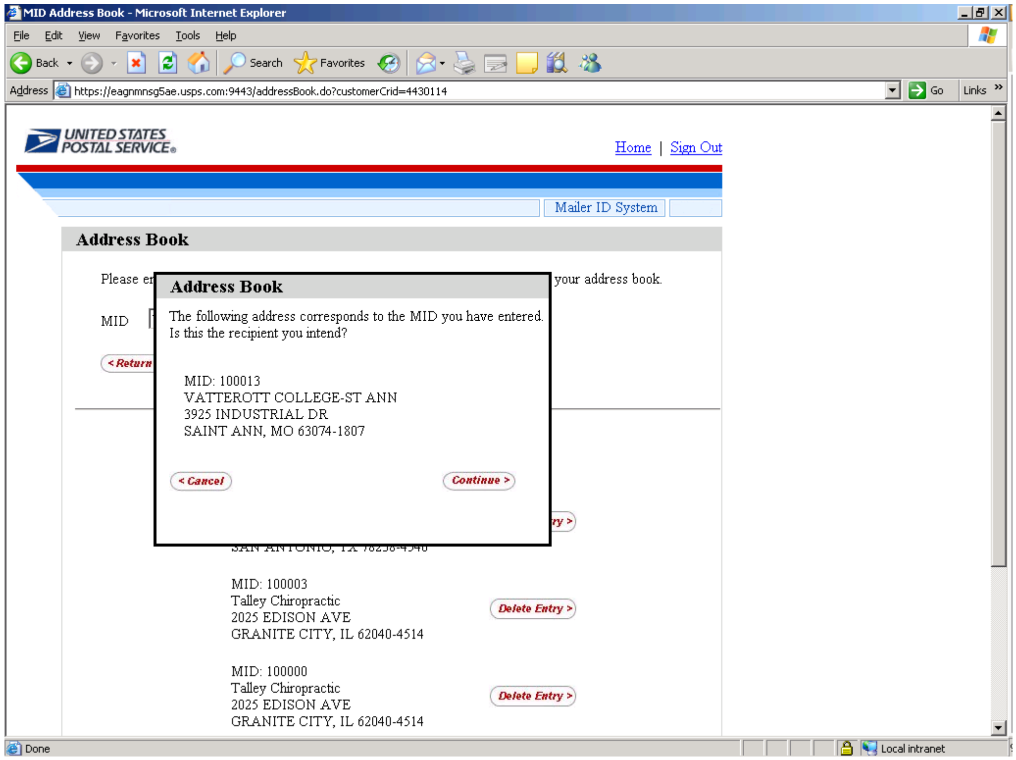


Figure 48: Entering a MID in Address Book

3.2 Mail.dat

3.2.1 Overview

The Mail.dat file format is an electronic data exchange with the *PostalOne!* system. To participate in the *PostalOne!* program, the files and fields must comply with the *PostalOne!* Mail.dat file formats. Technical details concerning Mail.dat file format and content are provided in the *Postal Service Mail.dat Technical Specification*.

Participants must successfully transfer version 09-1 Mail.dat files to the Testing Environment for Mailers (TEM) *PostalOne!* System before transferring version 09-1 Mail.dat files to the Production *PostalOne!* system. The Production Environment will be used by all customers that have been validated in the TEM environment by the USPS to start sending the transaction/messages. Refer to the section 3.5 regarding the TEM.

TEM will support Mail.dat Versions 08-2 and 09-1. Mail.dat version 08-1 will no longer be supported for new mailers not currently engaged with the USPS. This environment is integrated with the login procedures for the new Business Customer Gateway system, allowing Mailers to use the same Username and Password for the TEM. The TEM environment will support both the existing Mail.dat Transfer Applet or Batch Processor, and the new file upload infrastructure.

Note. Currently only the Mail.dat version 09-1 supports the Full-Service option. To use Mail.dat version 09-1, a Customer Registration ID (CRID) and Mailer ID (MID) are required. For more information, refer to the *Postal Service Mail.dat Technical Specification*.

To begin participating in Mail.dat a user must first request and get approved for access to the *Manage Mailing Activity* service. Once the request for the Manage Mailing Activity is approved by the BSA (user will receive a notification by email), the user logs in to the Business Customer Gateway and clicks on the "Electronic Data Exchange" link on the left-hand side of the screen on the Business Customer Gateway user homepage. Refer to Figure 49.

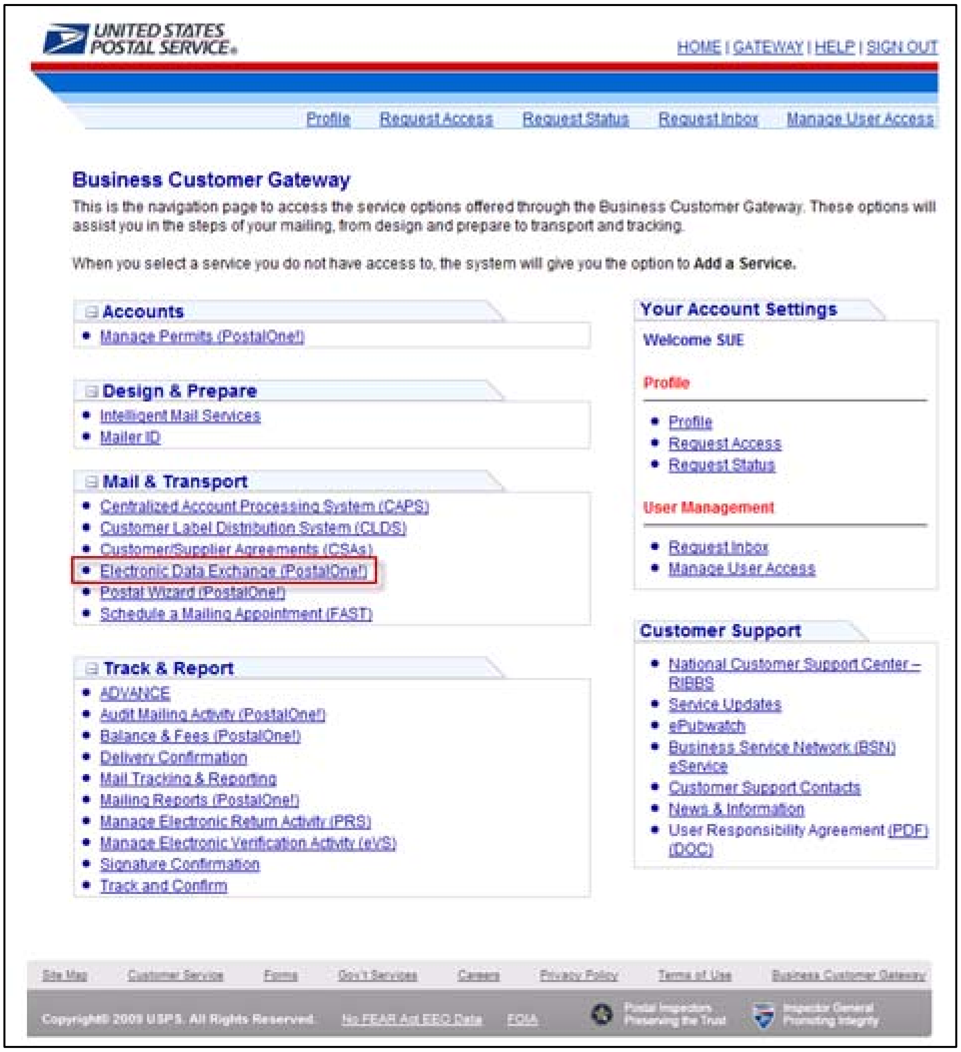


Figure 49: Electronic Data Exchange Link

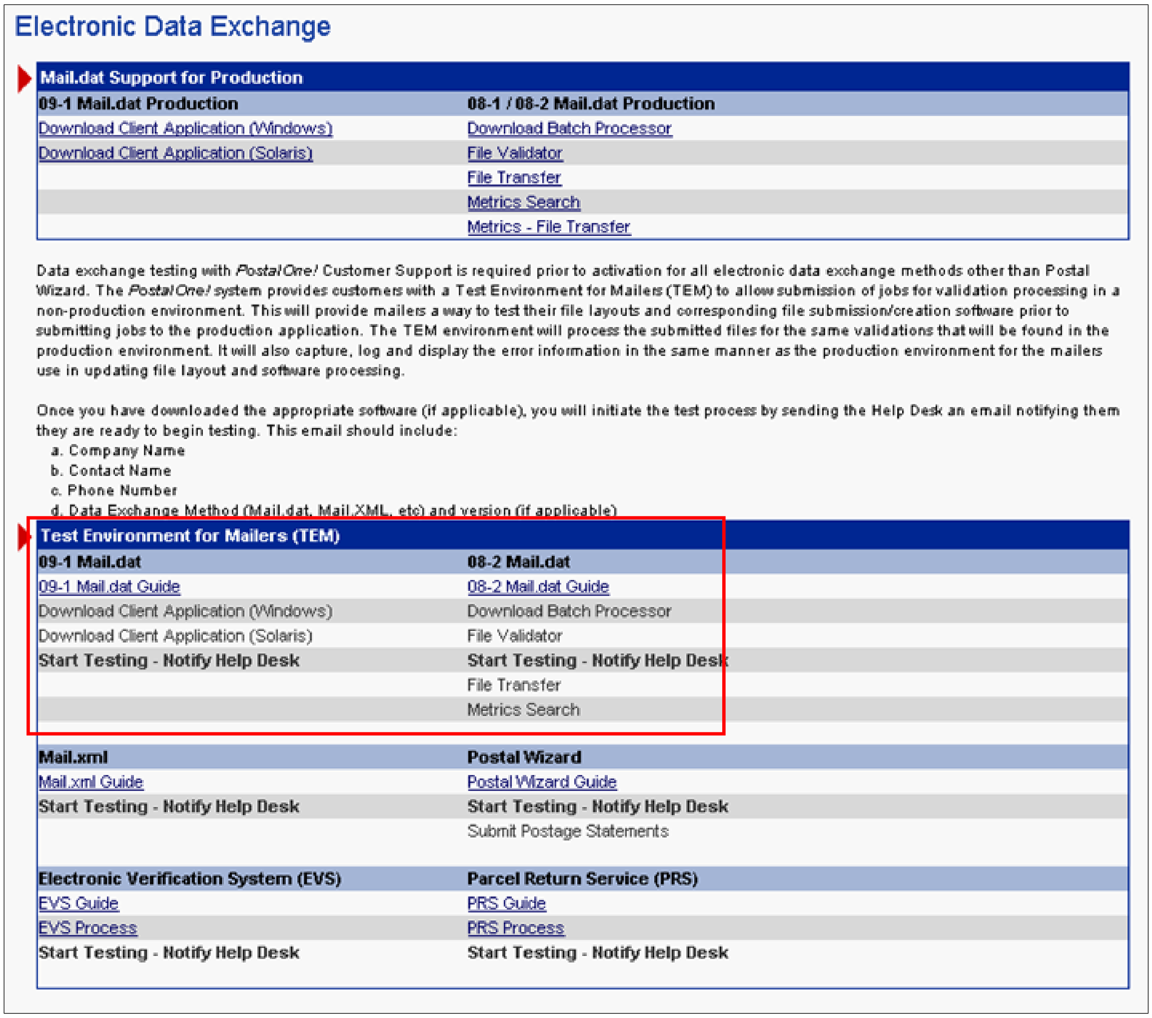
3.3.2 Mail.dat Test Environment

The Postal Service provides a Test Environment for Mailers (TEM) to allow customers to practice and hone the ability to send electronic documentation information to the U.S. Postal Service Business Services and/or online applications. The TEM replicates a Postal Service production-like environment. eDoc file layouts and corresponding file submission or creation software preparation can all be tested prior to participating in "live" mailings. Refer to the *Postal Service Mail.dat Specification* and the *Postal Service Mail.XML Specification* guides for detailed requirements. Refer to section 3.5 for information on how to access the TEM.

Mailers must work with the help desk to start the process of validating files, software and executing test criteria which must all be completed in the TEM environment. Refer to section 3.5 for information on the TEM process.

Production Environment

For Production use, under the “09-1 Mail.dat Production” heading, click on “Download Client Application (Windows)” or “Download Client Application (Solaris)”.



Electronic Data Exchange

Mail.dat Support for Production	
09-1 Mail.dat Production	**08-1 / 08-2 Mail.dat Production**
Download Client Application (Windows)	Download Batch Processor
Download Client Application (Solaris)	File Validator
	File Transfer
	Metrics Search
	Metrics - File Transfer

Data exchange testing with *PostalOne!* Customer Support is required prior to activation for all electronic data exchange methods other than Postal Wizard. The *PostalOne!* system provides customers with a Test Environment for Mailers (TEM) to allow submission of jobs for validation processing in a non-production environment. This will provide mailers a way to test their file layouts and corresponding file submission/creation software prior to submitting jobs to the production application. The TEM environment will process the submitted files for the same validations that will be found in the production environment. It will also capture, log and display the error information in the same manner as the production environment for the mailers use in updating file layout and software processing.

Once you have downloaded the appropriate software (if applicable), you will initiate the test process by sending the Help Desk an email notifying them they are ready to begin testing. This email should include:

a. Company Name
b. Contact Name
c. Phone Number
d. Data Exchange Method (Mail.dat, Mail.XML, etc) and version (if applicable)

Test Environment for Mailers (TEM)	
09-1 Mail.dat	**08-2 Mail.dat**
09-1 Mail.dat Guide	08-2 Mail.dat Guide
Download Client Application (Windows)	Download Batch Processor
Download Client Application (Solaris)	File Validator
Start Testing - Notify Help Desk	**Start Testing - Notify Help Desk**
	File Transfer
	Metrics Search
Mail.xml	**Postal Wizard**
Mail.xml Guide	Postal Wizard Guide
Start Testing - Notify Help Desk	**Start Testing - Notify Help Desk**
	Submit Postage Statements
Electronic Verification System (EVS)	**Parcel Return Service (PRS)**
EVS Guide	PRS Guide
EVS Process	PRS Process
Start Testing - Notify Help Desk	**Start Testing - Notify Help Desk**

Figure 50: Access to software in the TEM for Mail.dat versions 09-1 and 08-2

3.3 Mail.XML

3.3.1 Overview

Mail.XML is a complement to Mail.dat; participants of Mail.dat can continue to use it as a database but can use the Mail.XML for communication, automation of business to business processing and getting Full-Service feedback in near real time. Mail.XML version 6.0 specifications is composed of families of related messages that provide all the capability that Mail.dat specification provided, as well as business function support that Mail.dat did not provide. Refer the Postal Service Mail.XML Technical Specification for full details.

As part of *PostalOne!* support for the Full-Service program, Mail.XML 6.0 Web Services messages will provide an alternative to and replaces the current Wizard Web Services (WWS).

The Mail.XML version 6.0 is used for providing data feedback to you for Full-Service, such as Start-the-Clock, Container Induction Scans, Full-Service ACS COA and Nixie detail records, as well as verification errors or By/For information mismatches**.**

3.3.2 Mail.XML Test Environment

The TEM environment is used for software approval processes for all mailers prior to moving into production environment. Mailers must work with the help desk to start the process of validating software and executing test criteria which must be completed in the TEM environment. Refer to section 3.5 for information on the TEM process.

Production Environment

The environment will be used by all customers that have been validated in the TEM environment by the USPS to start sending the transaction/messages.

3.3.3 Mail.XML Push Data

For the Mail.XML Push data, the USPS invokes a Customer's Web Services. Through the Push Subscription Profile, a customer can register with the Business Customer Gateway as a subscriber of detail data (Delivery messages). The customer can register to automatically receive either the detail data or the notifications as they pertain to Start-the-Clock, Container Visibility Scans, Full-Service ACS COA and Nixie data. Refer to the following section, Push Subscription Profile.

3.3.4 Push Subscription Profile

The Push Subscription Profile is a business service, which provides the ability to setup data distribution profiles and a "push" method of data distribution to customers or their affiliates.

Note: To receive Full-Service push data the customer must set up a business account using the Business Customer Gateway. A new or existing customer, after completing the Business Customer Gateway approval and request access steps for the Manage Mailing Activity service, must also set up a push subscription profile (accessed through Mailing Reports). This activation process enables data distribution control. Data distribution is driven by data provided in the eDocumentation to the *PostalOne!* system with the By/For relationship. The MID profile if set up by the customer, take precedence on authorization rules over the electronic documentation data.

The Push Subscription Profile provides the ability to set up data distribution profiles and methods of data distribution through subscriptions. Refer to the *PostalOne!* Mail XML Technical Specification.

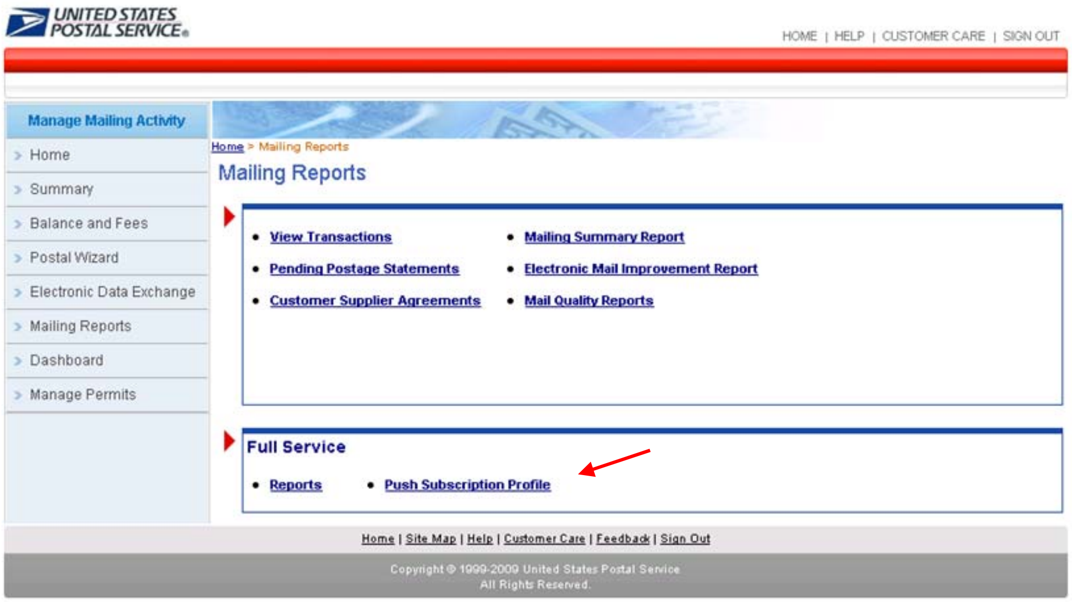


Figure 51: Push Subscription Profile access

3.3.5 View Push Subscription(s) Data

From the Mailing Reports page (Figure 51), the user clicks on a link named, “Push Subscription Profile”. The system will display the Full-Service Push Data Profile page that lists all message types along with the Business Entity’s subscription status for each message type**.** A user selects a business entity from the dropdown menu to refresh the table containing the Message Type, Status and Actions columns. Refer to Figure 53.

Each message type is listed with three data elements.

1. Message Type. The name of the message, which can be either of four types.
   a. Full-Service Address Correction
   b. Full-Service Container Visibility
   c. Full-Service Nixie
   d. Start-the-Clock

2. Subscription Status. The status indicates whether the business entity has a subscription for the Message Type. Possible values include: Subscribed to Data Push, Subscribed to Data Notification, or Not Subscribed.

3. Actions. For a Message Type that the business entity is already subscribed, there will be two hyperlinks “Edit” and “Unsubscribe” that allow the user the option to edit or unsubscribe to a subscription.

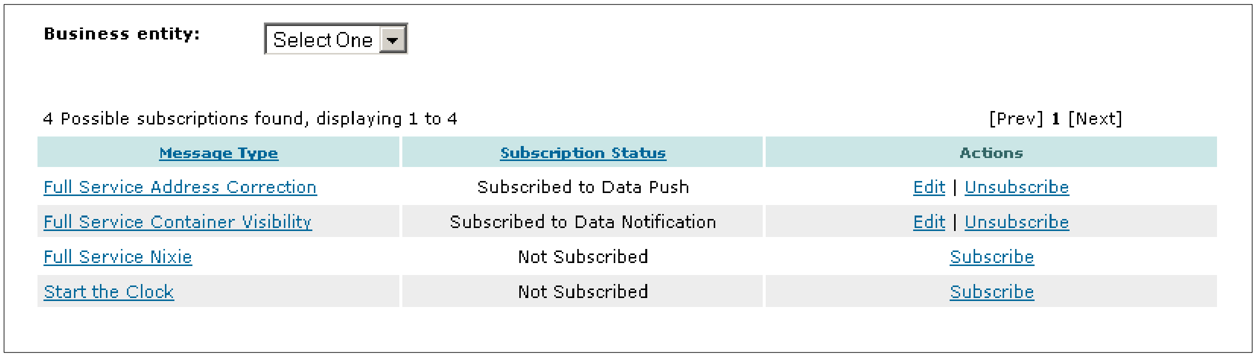


Figure 53: Subscriptions and Messages System-returned Screen

3.3.6 New Push Data Subscription(s)

From the Full-Service Subscriptions and Messages System-Returned Screen page, if the user clicks on the Subscribe link for a message type, the system displays a new Push Data subscription page (Figure 53).

The user selects from the Push Type dropdown menu and enters all the required fields then clicks submit to subscribe to a Message Type. (See Figure 54)

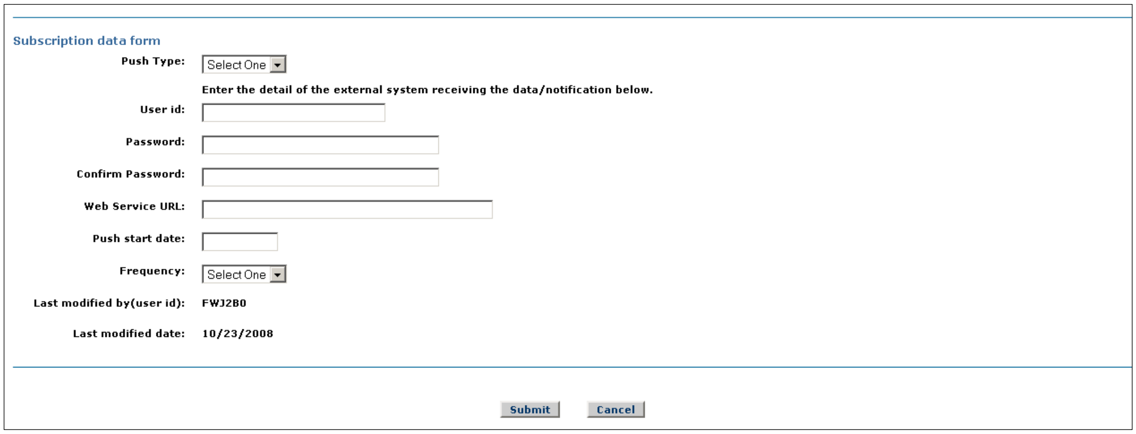


Figure 54: Push Data Subscription (subscribe mode)

3.3.7 Edit Push Data Subscription(s)

On the Subscriptions and Messages System-returned screen (Figure 55), if the user clicks on the Edit link for a subscribed message, the system will display the subscription profile in the edit mode. A user must first select the Message Type from the Push Type dropdown menu, and has the option to change or update the required field(s) and then click submit

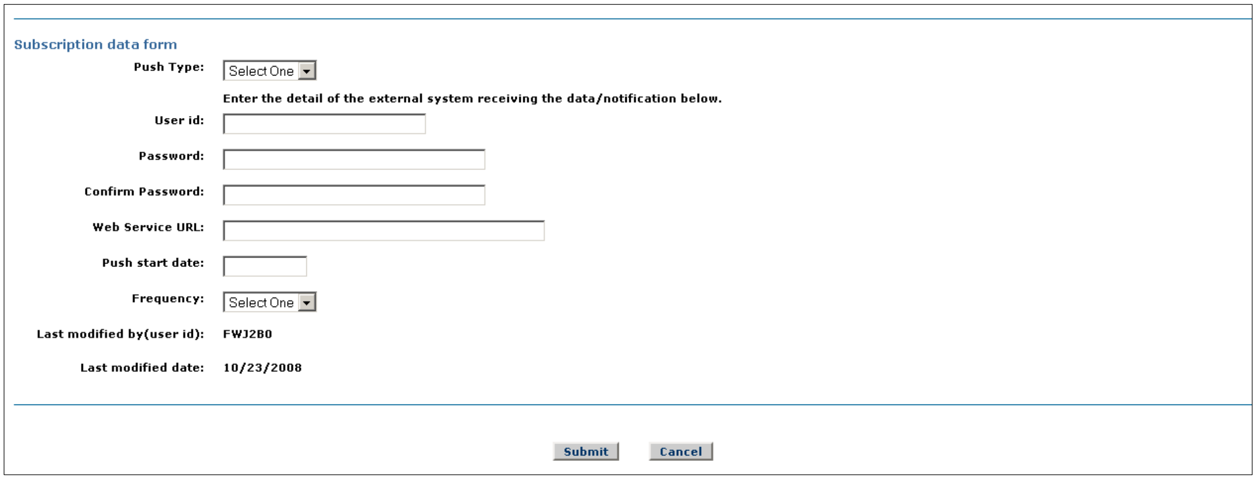


Figure 55: Edit Push Data Subscription (edit mode)

3.4 Postal Wizard

The Postal Wizard (PW) uses a secure protocol to submit postage statements online. The PW can be used when no electronic documentation is necessary.

A Mailer who elects to use the Postal Wizard applies for user access through the Business Customer Gateway. To access the Postal Wizard, a user requests the *Manage Mailing Activity* service (Refer to the section on Business Services to learn how to request a service). Once the request for the Manage Mailing Activity is approved by the BSA (user will receive a notification by email), the user can log in to the Business Customer Gateway. The user then selects the Postal Wizard under the Manage Mailing Activity menu (Figure 56). To claim Full-Service, a mailer must check the Full Service indicator checkbox on the Postage Statement (Figure 57), and enter the Mailer ID (Figure 58).

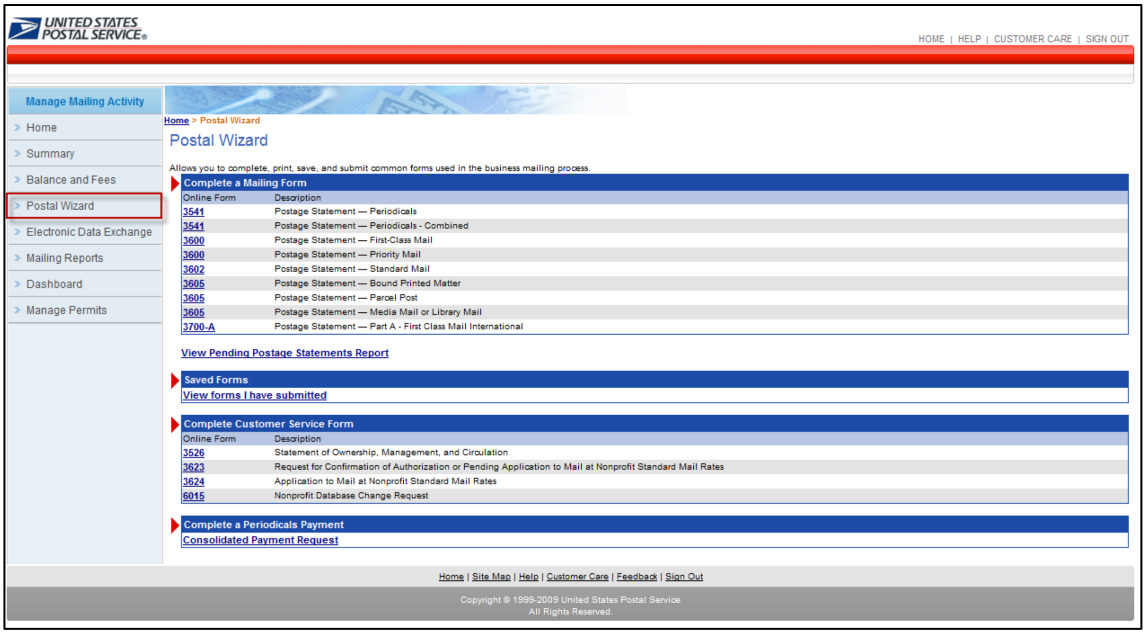
Full-service information is visible to the users from Postal Wizard on the postage statements through the Dashboard. Such information includes the full-service indicator, and other mailing information (Permit Type, Permit Number, postage statement sequence number, total number of pieces, class of mail, and processing category).

Users must click the checkbox to indicate a mailing is Full-Service for the Mail Class. Mailers must input specific information necessary for full-service including the six (6) or nine (9) digit Mailer ID or Mailing ID, the lowest piece ID (6 or 9 characters) and highest piece ID (6 or 9 characters), and Dispatch information. Refer to Figure 57.

Postal Wizard cannot be used with full-service Periodicals and BPM mailings, even if under 10,000 pieces. For Full-Service mailings using the Postal Wizard, only the owner of the mailing permit will receive Start-the-Clock information. For the Basic option Mailers electing to use eDoc with Postal Wizard or elect to use Postal Wizard under Submit a Form to submit their postage statement information must satisfy the eligibility requirements (refer to the Guide to Intelligent Mail for Letters and Flats for information on the Full-Service and/or Basic options conditions when using the Postal Wizard. A summary of the conditions are as follows:

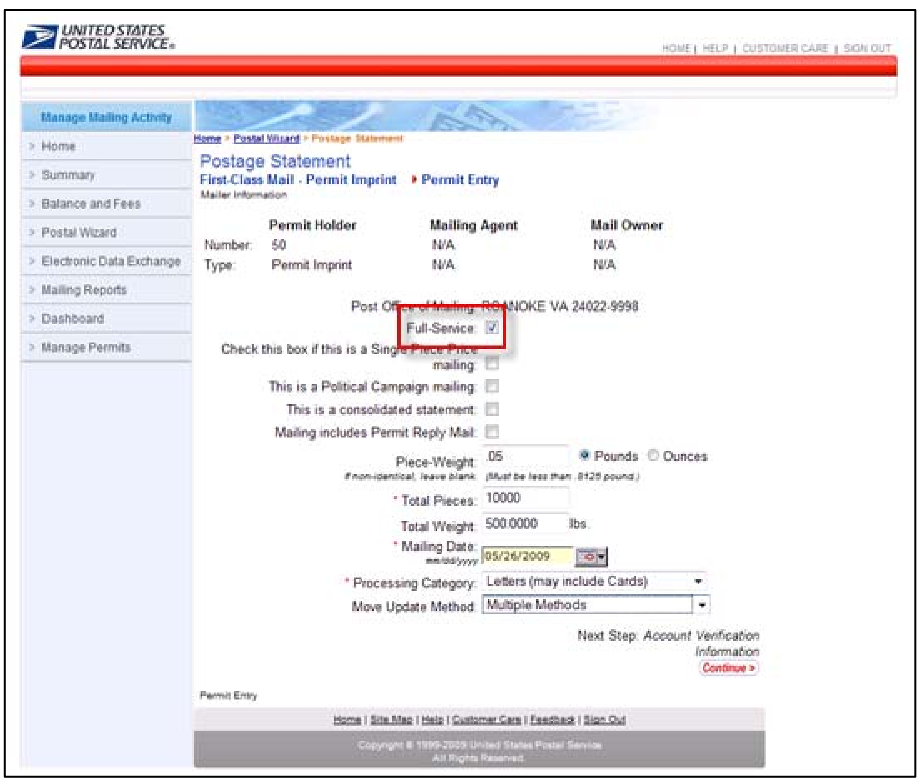
- ☐ Each mailing must be accompanied by presort and price documentation produced by (Presort Accuracy Validation and Evaluation) PAVE -certified or MAC-certified software or by standardized documentation. The exception is for mailings of fewer than 10,000 pieces, where presort and price documentation is not required, if postage at the correct price is affixed to each piece or if each piece is of identical weight, and the pieces are separated by price when presented for acceptance.
- ☐ Mailers may use a single postage statement and a single documentation report for all price levels in a single mailing.

☐ Standard Mail mailings prepared under the Value Added Refund procedure or as combined mailings must meet additional standardized documentation requirements under DMM 604.9.0, Refunds and Exchanges, and 705.5.0, First-Class Mail or Standard Mail Mailings with Different Payment Methods.



☐ Figure 56: The Accessing the Postal Wizard

☐



☐ Figure 57: The Full-Service indicator box (after the postage statement type is selected, First-Class Mail in this example)

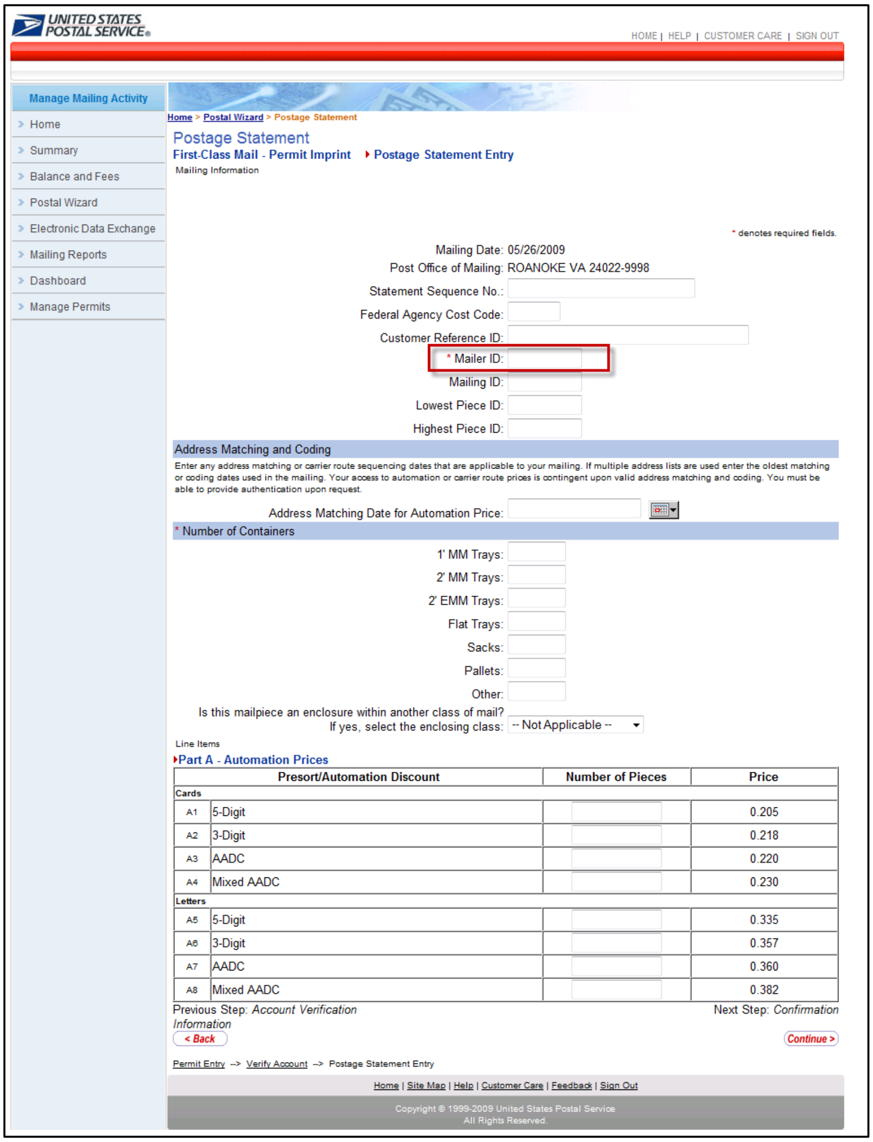


Figure 58: Mailer ID must be entered during the Postage Statement Entry screen

3.5 Test Environment for Mailers (TEM)

The Test Environment for Mailers (TEM) is designed to allow customers to practice and hone the ability to send electronic documentation information to the U.S. Postal Service system. Mailers upload files to a Postal Service production-like environment of the Postal Service system. This test environment provides Mailers a way to test file layouts and corresponding file submission and/or test creation software that create electronic submission documentation prior to participating in the production environment. The TEM will process submitted files for the same validations that are found in the production environment. The TEM will also capture, log, and display error information in the same manner as in the production environment. Mailers in turn can make adjustments or modification to file layouts and software processing.

The TEM currently supports the 08-2 Mail.dat and 09-1 Mail.dat; and Mail.XML file formats. Only Mailers currently engaged with 08-1 Mail.dat format will be supported in the production environment. The TEM will not support new mailers who wish to use Mail.dat 08-1, but will continue to support Mail.dat 08-2 through the existing Transfer Applet or Batch Processor.

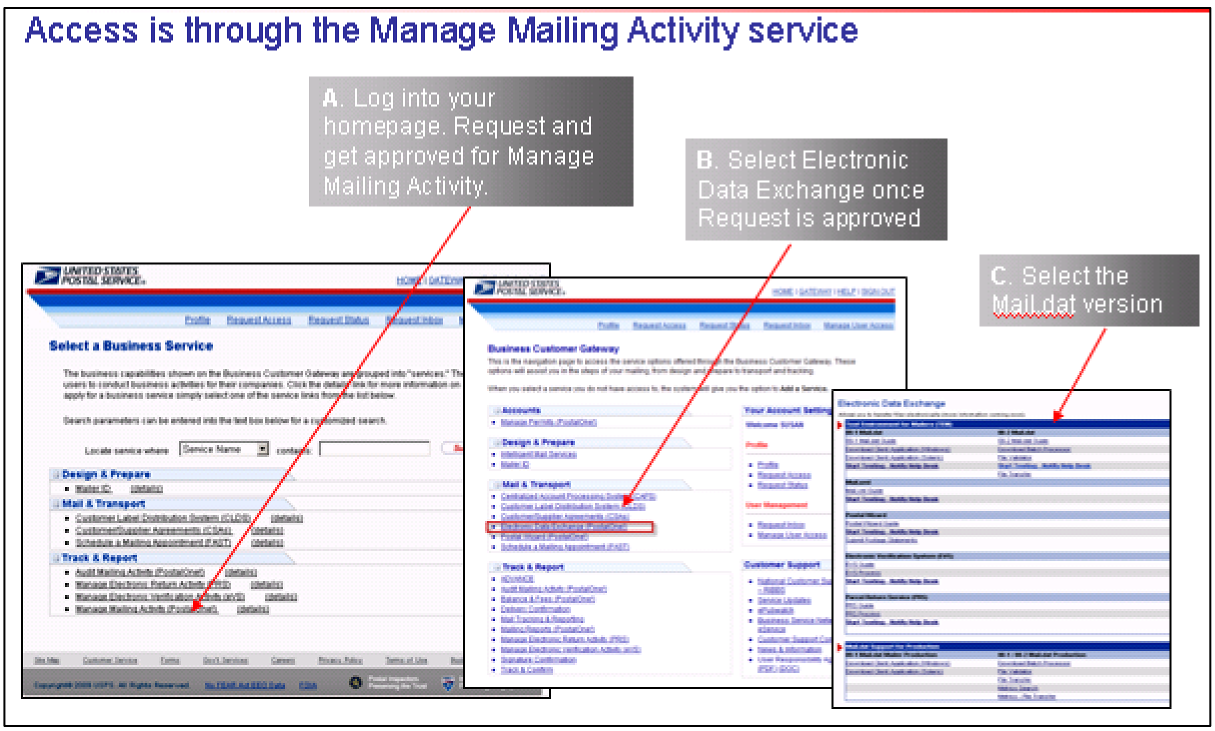
Mailers who wish to test Mail.dat 08-2 and 09-1 can do so using the TEM. Mailers who wish to participate in Full-Service are required to submit Mail.dat version 09-1 and pass test criteria in the TEM. Steps that guide Mailers through the TEM are outlined in the Intelligent Mail Full-Service checklist, which is available on the RIBBS Website at www.*ribbs.usps.gov*.

Mailers must validate version 09-1 Mail.dat files in the Testing Environment for Mailers (TEM) before sending version 09-1 Mail.dat files for Full-Service mailings. Mailers that use Postal Wizard are not required to send their postage statements to the TEM; however these mailers must conform to the conditions for using the Postal Wizard. Refer to the Postal Wizard section of this guide.

3.5.1 Accessing the TEM

To use the TEM a user must have a Mailer ID (MID) and CRID. For most customers, a MID can be requested through the Mailer ID system, accessed through the Gateway. The CRID is assigned by the Gateway customer registration system when an account is set-up by each user. To obtain a MID through the Mailer ID system, a customer must first request access to the Mailer ID system using the Gateway Request Access system (Refer to section 2.5 to learn more about new users requesting a service).

To access the TEM, a user must request the *Manage Mailing Activity* service (Figure 59). Once the request for the Manage Mailing Activity is approved, the user logs in to the Gateway and clicks on the “Electronic Data Exchange” link on the left-hand side menu of their homepage (Figure 60).



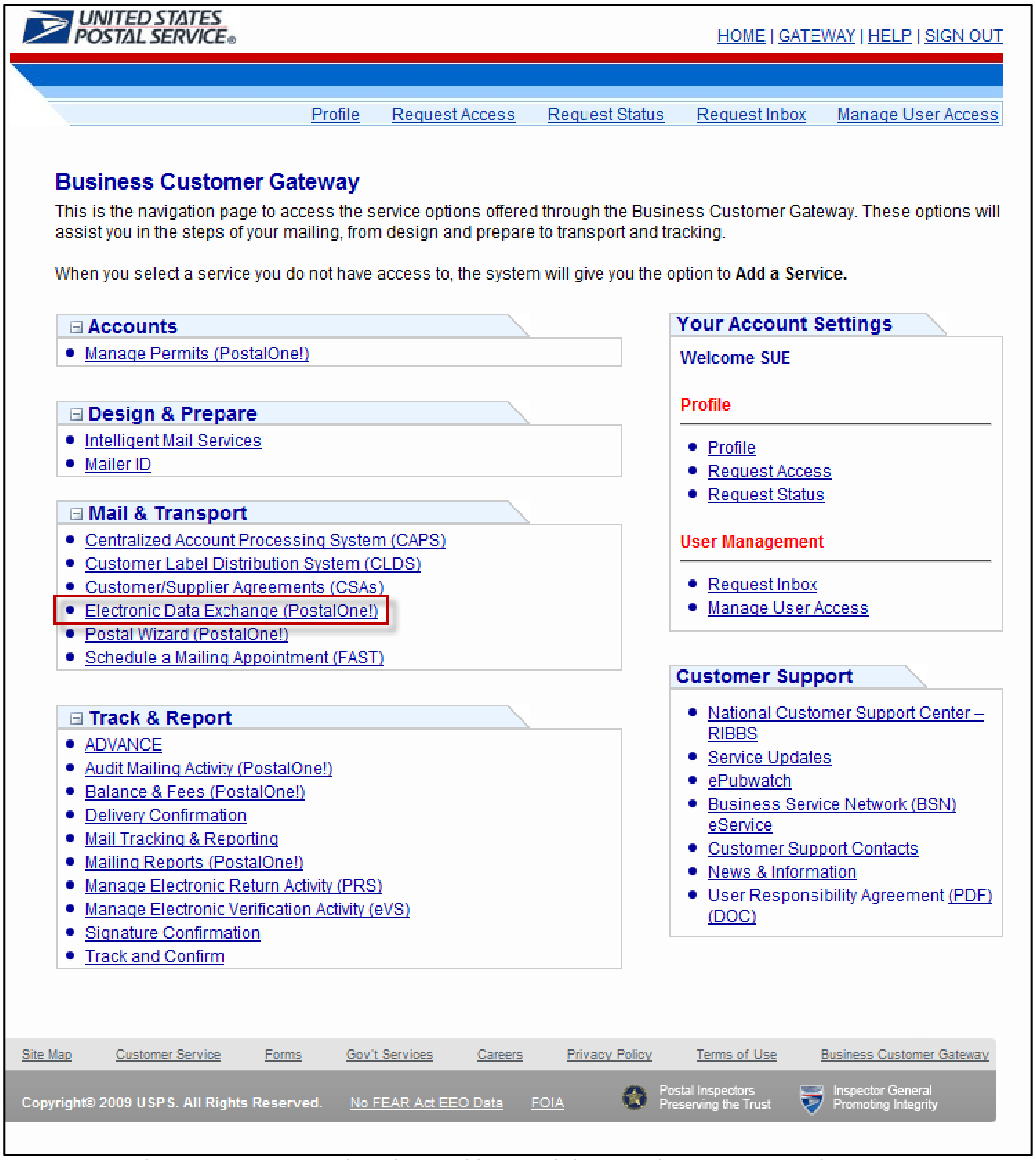


Figure 59. Requesting the Mailing Activity Service to access the TEM

Figure 60 The Electronic Data Exchange link (exploded view)

3.5.2 The Full-Service and Basic Checklist

To successfully conduct testing in the TEM, customers are recommended to follow the Intelligent Mail Full-Service & Basic Checklist posted on RIBBS. The checklist is designed to help mailers navigate the Mail.dat 09-1 file format requirements for electronic documentation and to assist with migrating to the Full-Service option. The checklist provides step-by-step tasks and accompanying worksheets for data set-up requests. Steps include a review of suggested Guides for technical considerations and for constructing Intelligent Mail barcodes, making plans for feedback, establishing access to the Business Customer Gateway, designing and validating barcodes. The Checklist also outlines the TEM process. The TEM process includes test scenarios for mailers to complete. Refer to Appendix Intelligent Mail Full-Service and Basic Checklist on RIBBS for updated Test Criteria.

3.5.3 TEM Process

The following section describes the TEM process. The recommended steps to complete the TEM process are summarized below, and are described in more detail in the section that follows.

TEM Process – A Quick Reference

- ✓ Logo on to the Business Customer Gateway and access the TEM through the Electronic Data Exchange link.
- ✓ Download Client Software if testing Mail.dat 09-1(or the batch processor application, file validator and transfer applet for Mail.dat 08-2)
- ✓ Notify the Help Desk by email that practice files will be sent to the TEM and submit Data Set-up Request worksheet
- ✓ Begin practice runs using the test scenarios
- ✓ Notify the Help Desk by email to start the validation of test scenarios, after successful practice runs.
- ✓ Complete the TEM process by executing the test scenarios and meeting the criteria (the Help Desk monitors and records)
- ✓ Wait for authorization from a USPS representative to begin submitting Full-Service mailings.

TEM Steps

① **Access the TEM**. The user clicks the “Go to TEM” link on the Electronic Data Exchange page to enter the TEM (Figure 61). Once in TEM, to return to the Gateway the user can select the “HOME” link, located at the top right corner (Figure 62). A popup window will display, notifying the user is leaving the Business Customer Gateway (Figure 63). If the user clicks a “Go to TEM” link, the first screen to appear is the Summary Transaction Information page after clicking the Electronic Data Exchange link from the user’s homepage (Figure 64). This Summary screen is considered the TEM homepage (Figure 63).

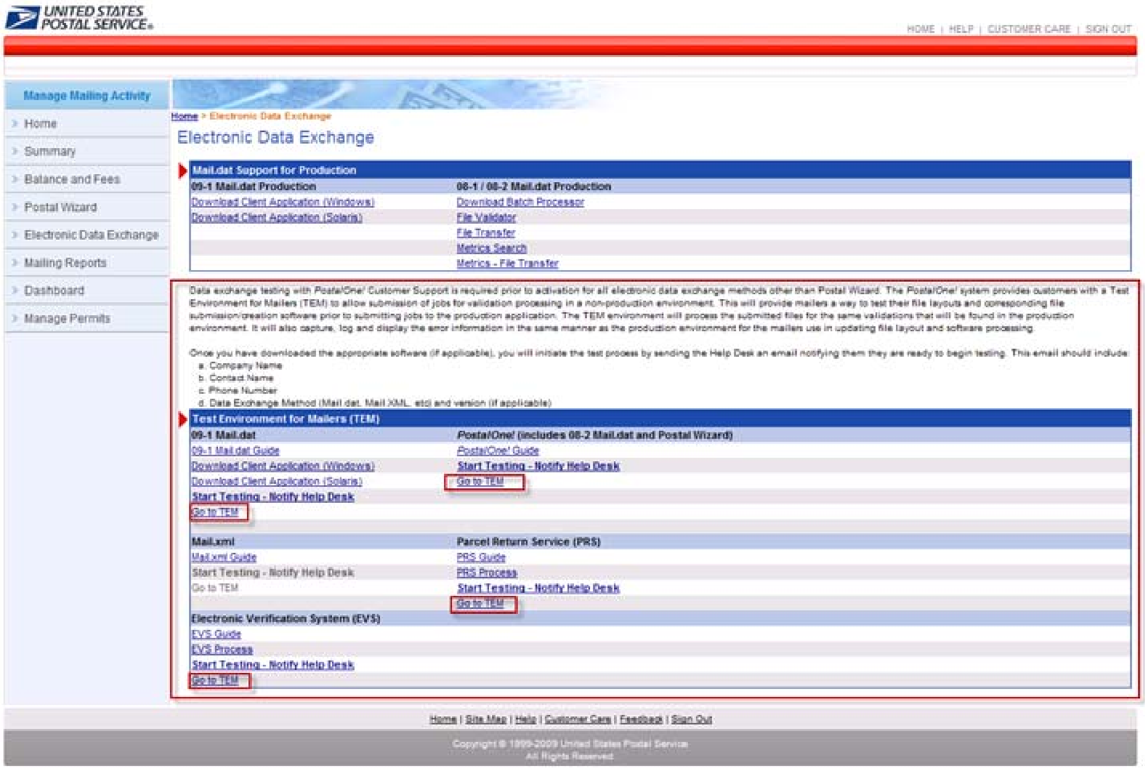


Figure 61: Go to TEM link

Leaving the TEM to return to the Gateway

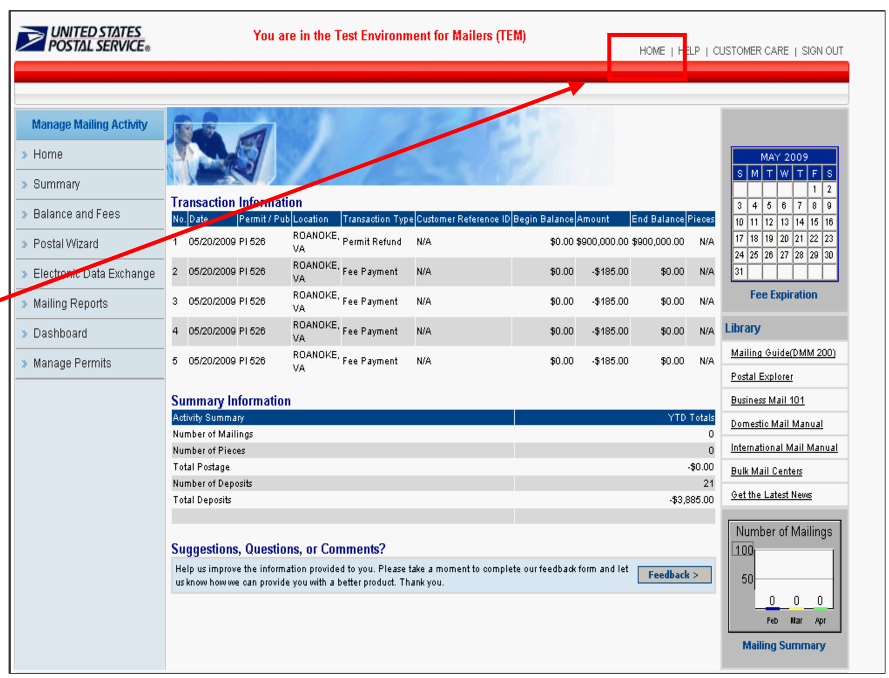


Figure 62: Leaving the TEM back to the Gateway

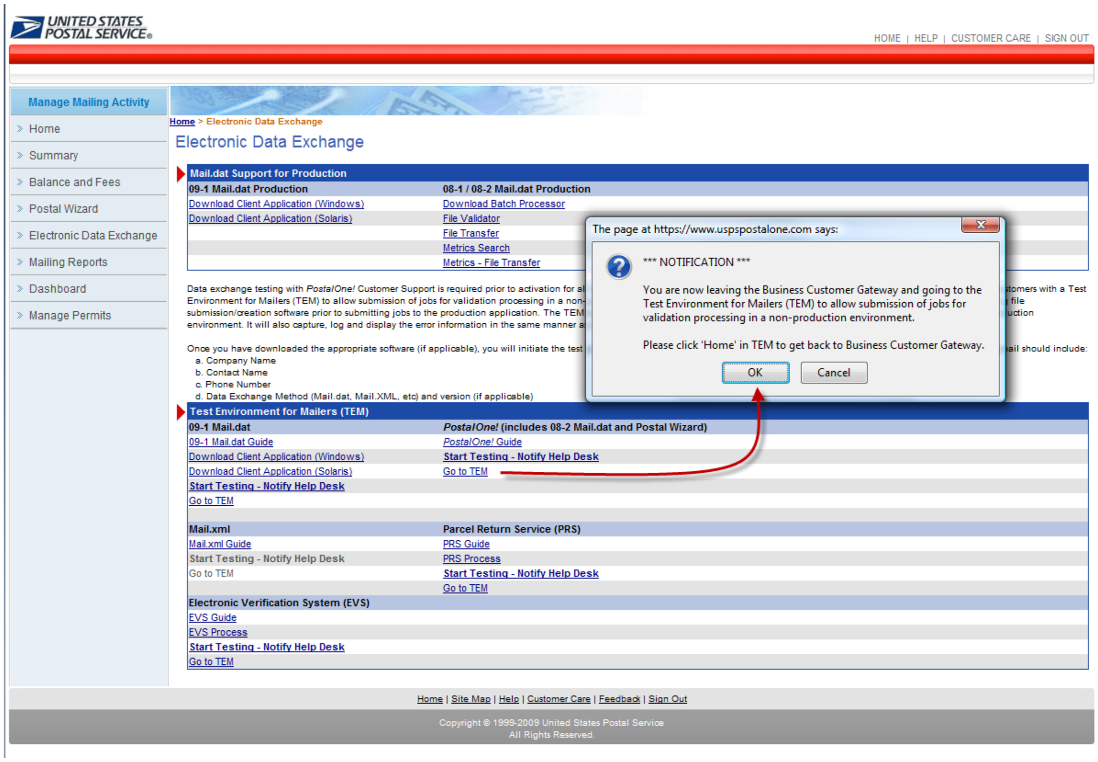


Figure 63: Leaving the Business Customer Gateway to enter the TEM

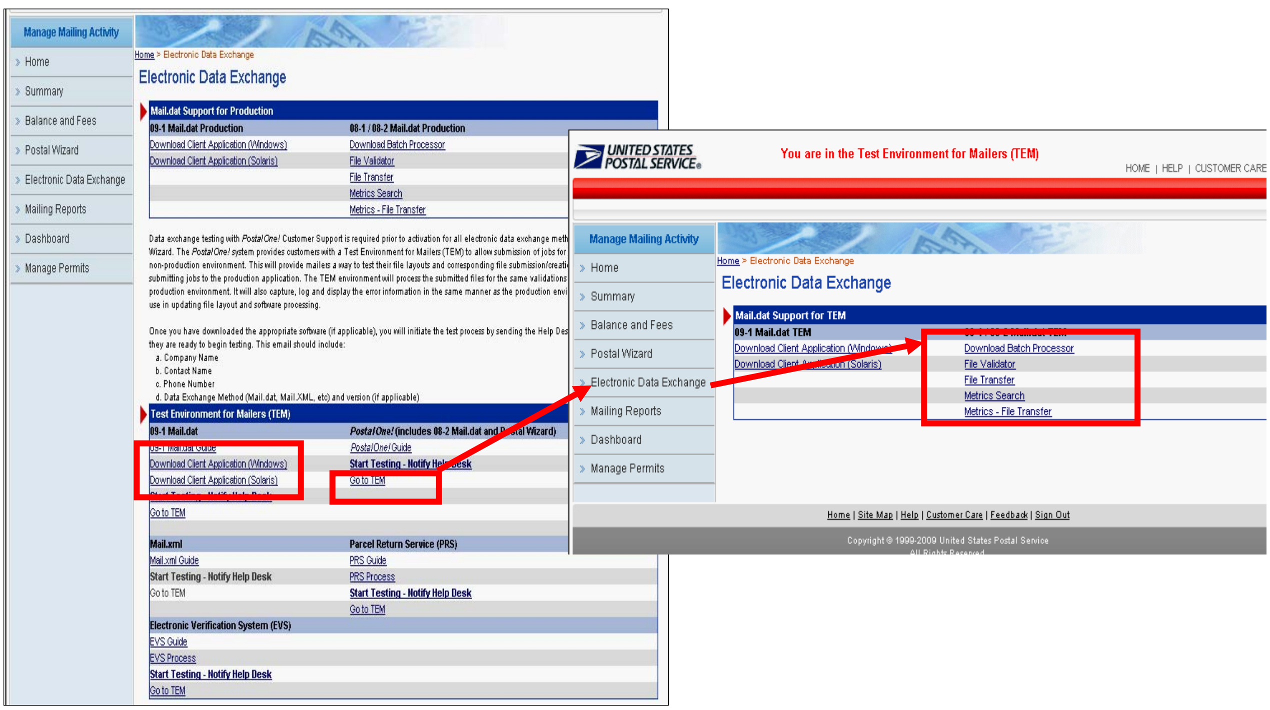


Figure 64: Selecting a particular Mail.dat version

Once inside the TEM, the user will have access to the same functionality as in the Production environment. Refer to the selection options under the Manage Mailing Activity menu. These supporting functions can be used when customers practice and execute the test scenarios.

- **Summary** (TEM homepage) to review transaction information (Figure 64-1)
- **Balance and Fees** *(PostalOne!)* to check balance and fees (Figure 64-2)
- **Dashboard** (*PostalOne)* management system) to submit and view jobs electronically (Figure 64-3)
- **Electronic Data Exchange** to download client software (Figure 64-4)
- **Mailing Reports** *(PostalOne!)* to access *PostalOne!* reports (Figure 64-5)
- **Manage Permits** to manage permits (Figure 64-6)

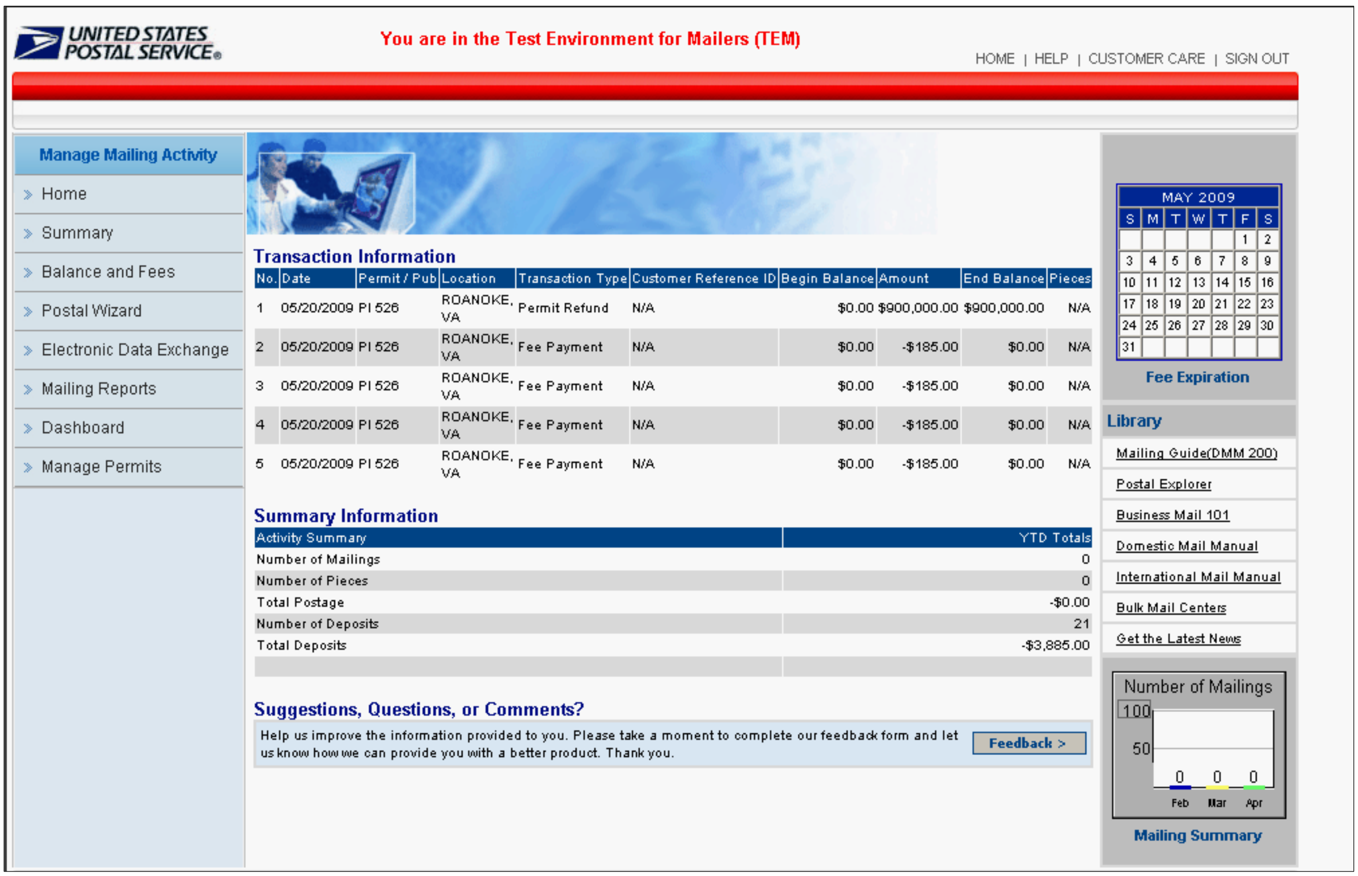


Figure 64-1: Summary page to review transaction information (TEM homepage)

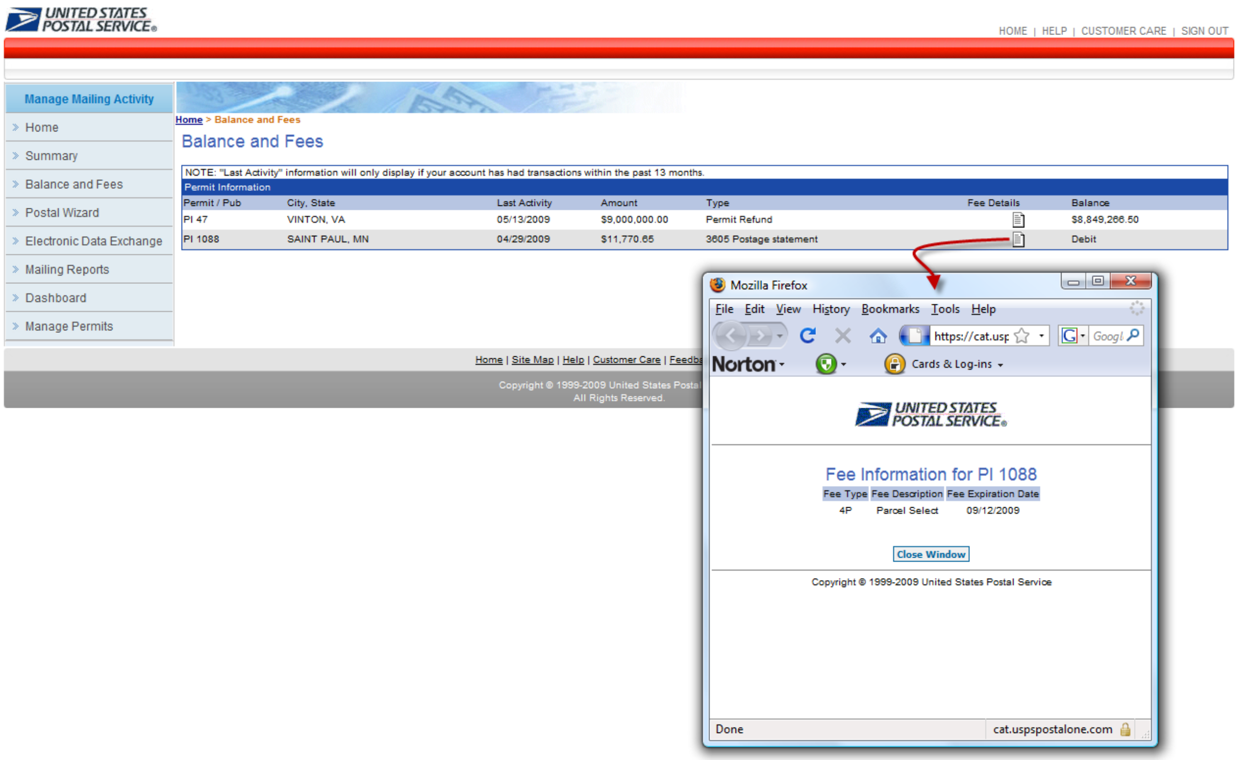


Figure 64-2: Balance and Fees to check balance and fees using *PostalOne!*

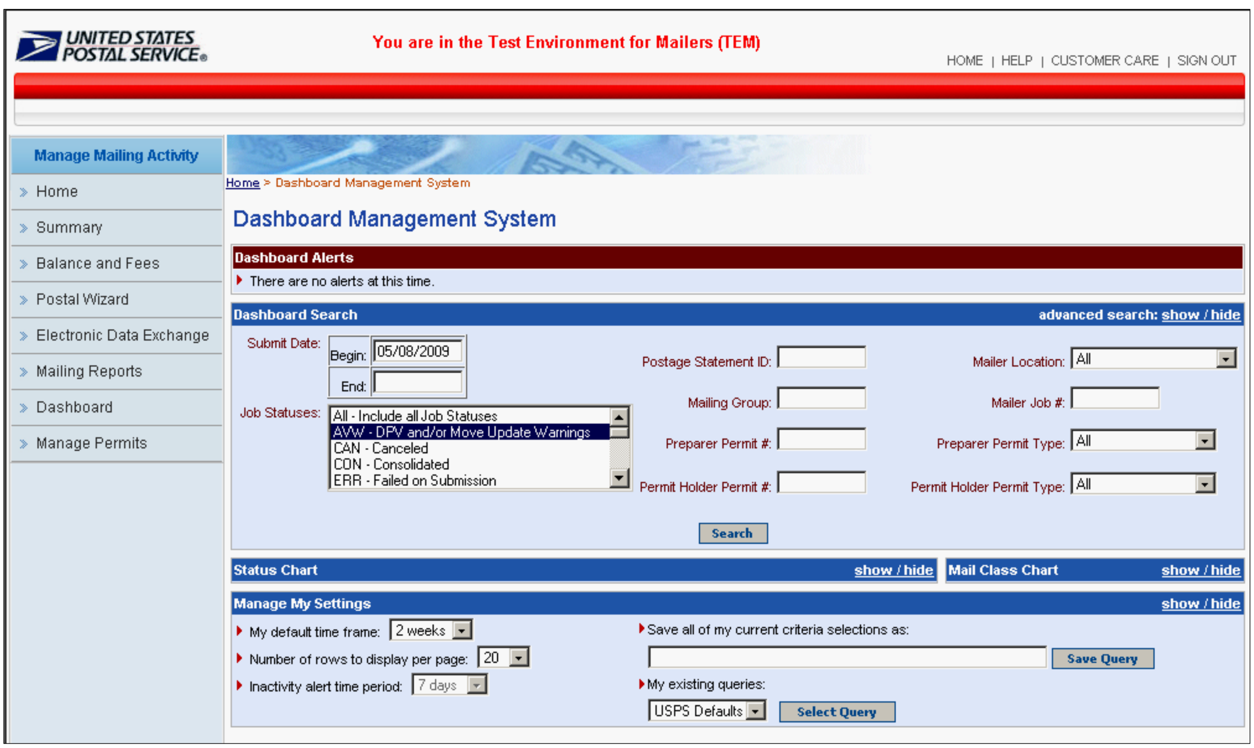


Figure 64-3: *PostalOne!* Dashboard

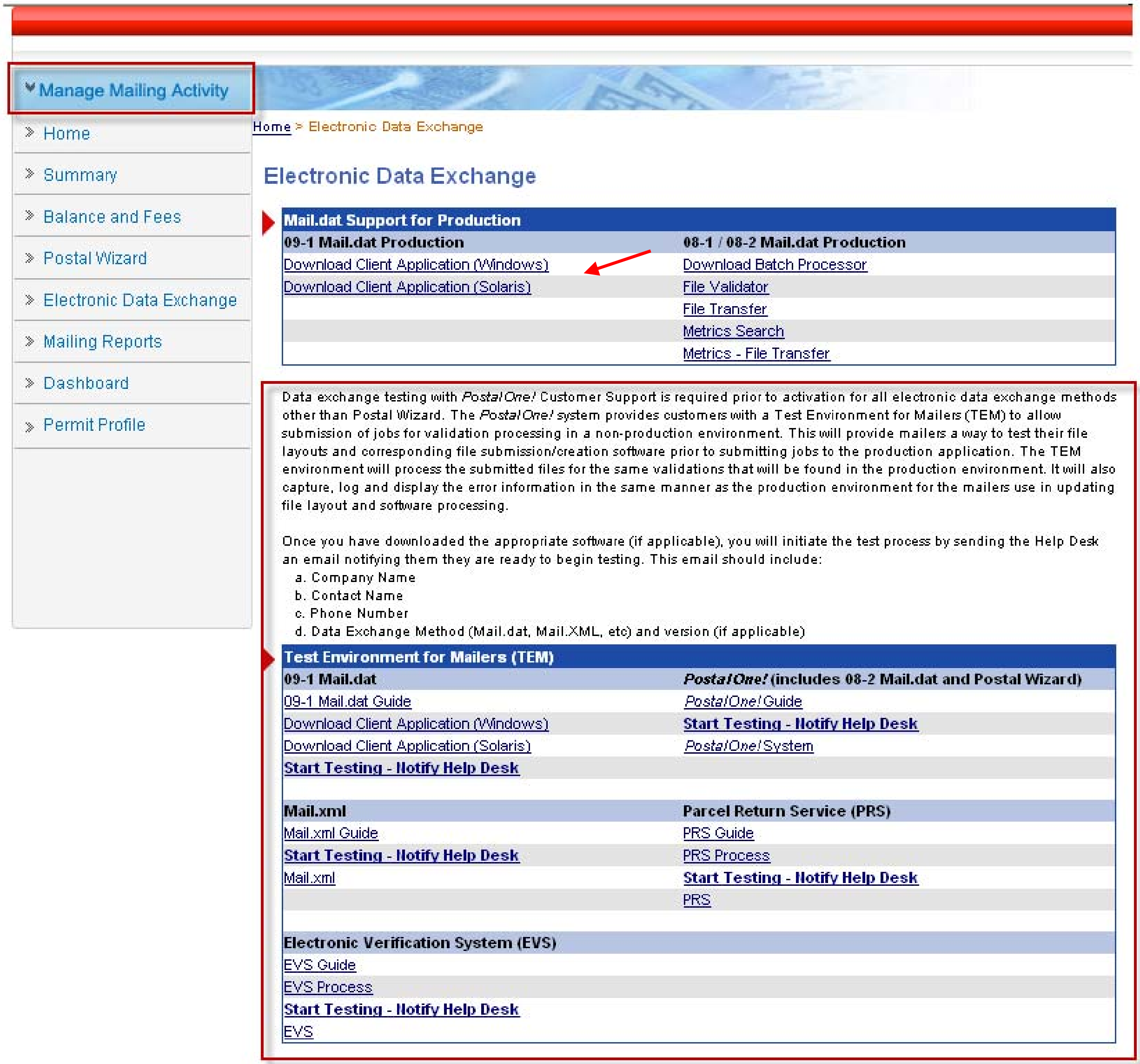


Figure 64-4: Electronic Data Exchange to download client software

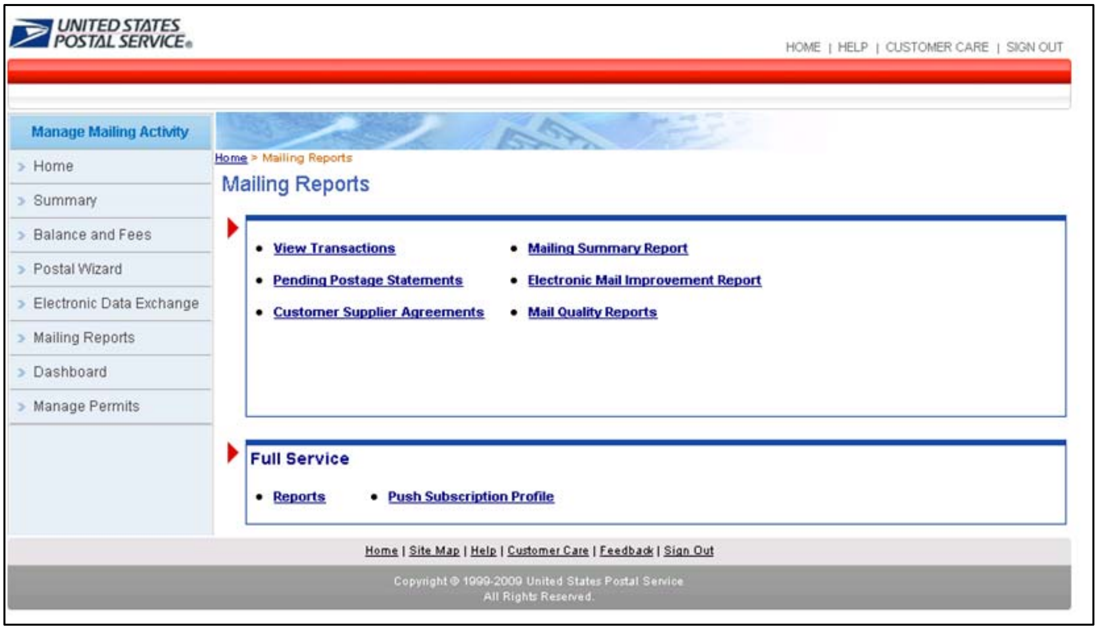


Figure 64-5: Mailing Reports to access *PostalOne!* reports

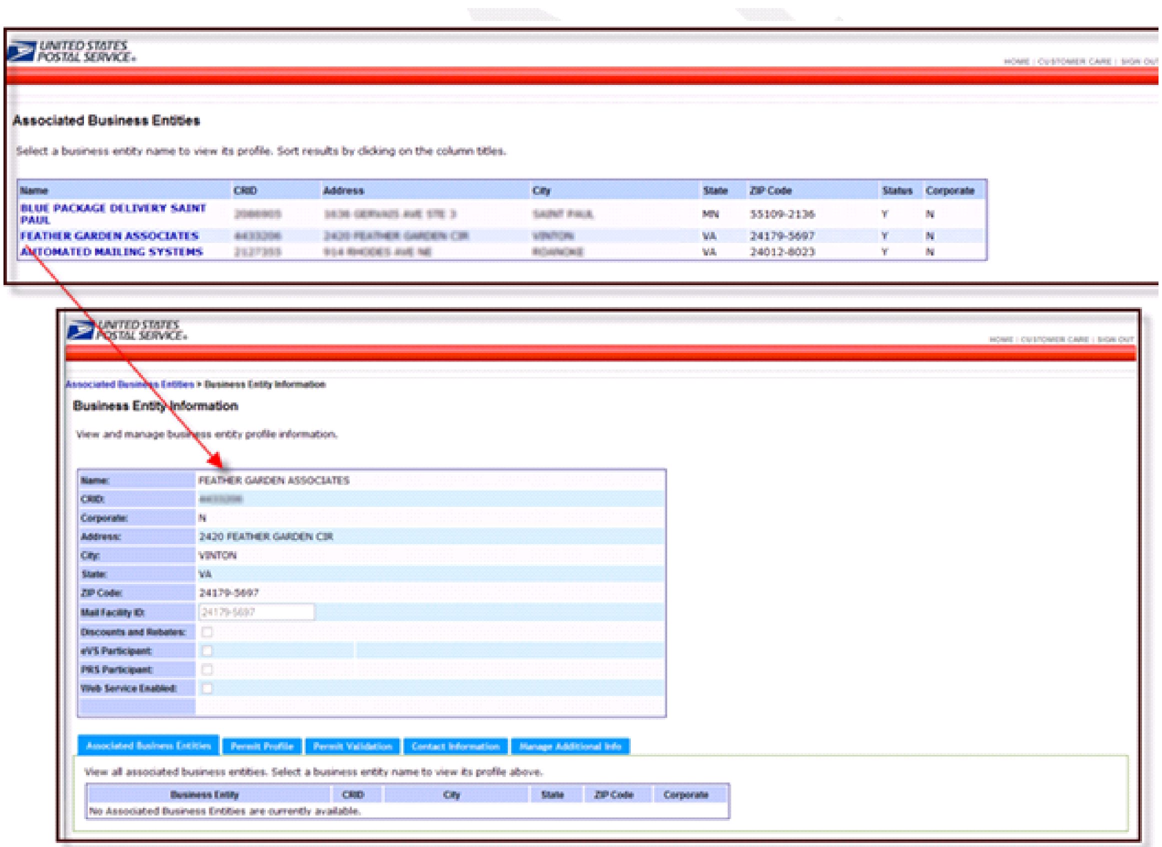


Figure 64-6: Managing permits

② **Download the client software.** Once inside the TEM, the user downloads the appropriate client software to transfer Mail.dat files (Figure 64-4). Refer to the Postal Service Mail.dat Technical Specification for detailed information on file processing, software and hardware requirements, and step-by-step instructions on how to use software applications available from the TEM. The following summarizes the four ways to submit Mail.dat files to the *PostalOne!* system.

✓ The Transfer Applet client, available on the *PostalOne!* website (link from TEM), manually transfers Mail.dat 08-1 and 08-2 files.

✓ The Batch Process application for Mail.dat 08-1 and 08-2, when scheduled, automatically transfers Mail.dat files to the *PostalOne!* File Upload Server

✓ The new Mail.dat 09-1 *PostalOne!* client allows for manual transfers of Mail.dat 09-1 and beyond files. See also section below

✓ The Batch Processor application for Mail.dat 09-1 and beyond, when scheduled, automatically transfers Mail.dat files to the *PostalOne!* File Upload Server using password protection and authenticated by the Gateway customer registration system.

3.5.3.1 Mail.dat 09-1 *PostalOne!* client software

The section that follows describes the Mail.dat 09-1 software applications available to the user from the TEM. Refer to the Postal Service Mail.dat Technical Specification, Appendix A, for detailed installation instructions and user guidance.

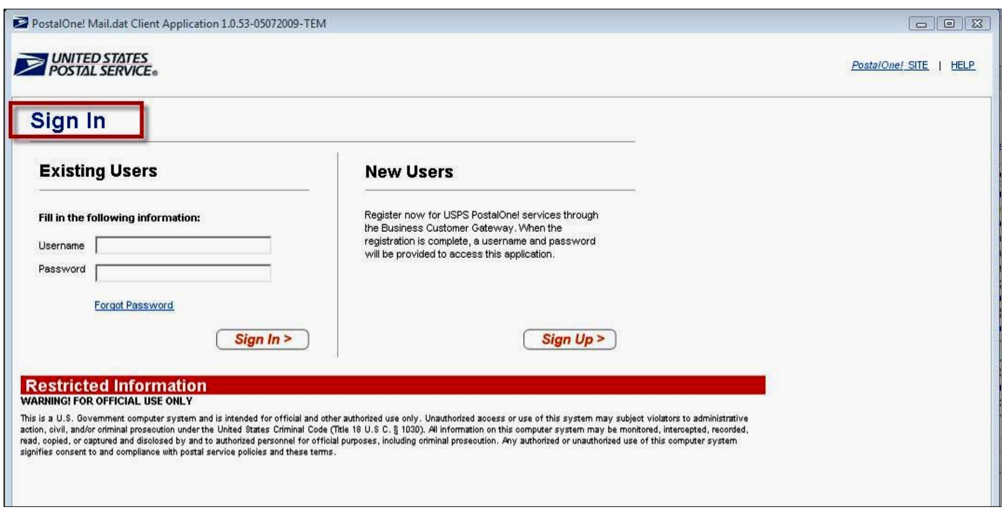


Figure 65-1: Client Application (09-1 Mail.dat) – Sign In

Once the user downloads the Client Application for Windows or Solaris for 09-1 files, the user clicks the application *run-mdclient* which will open the Sign In page. This Sign In interface requires the user's Gateway username and password (Figure 65-1).

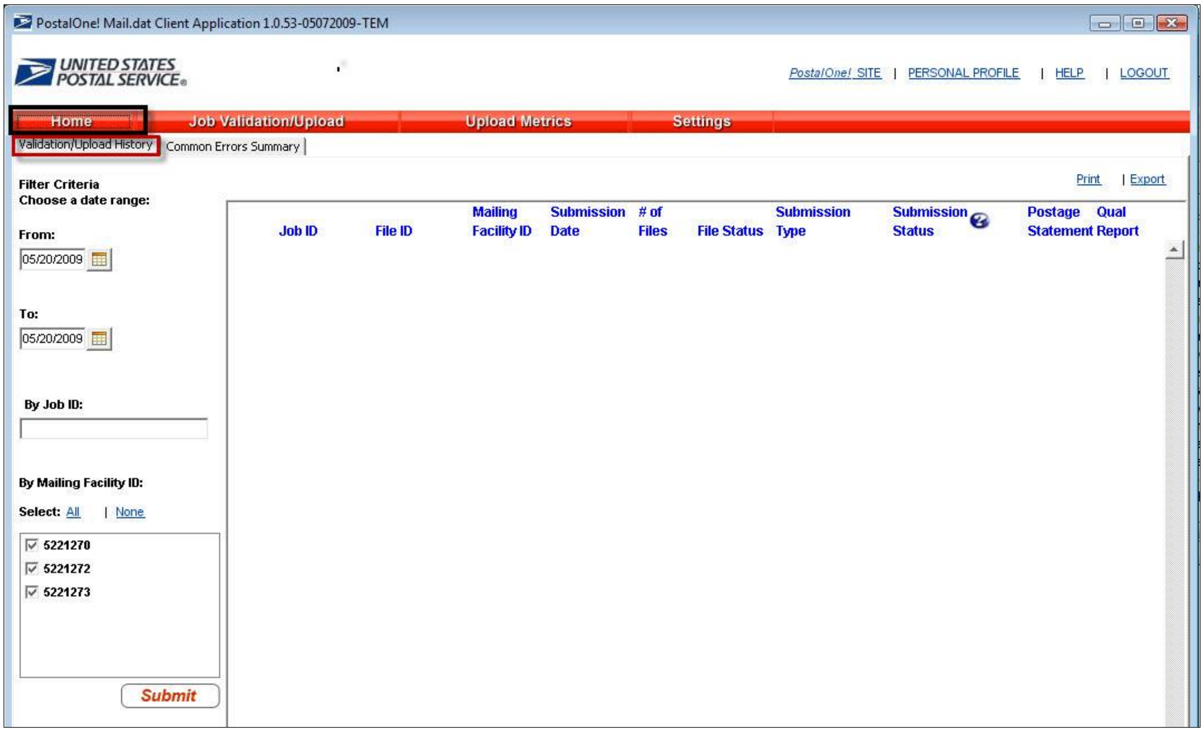


Figure 65-2: Home Page - Validation Upload History

After the user signs in, the HOME page of the Client Application appears (Figure 65-2). There are two tabs – Validation/Upload History and Common Errors Summary. On the Validation/Upload History page, the user selects the date range and any other filters as necessary (Job ID or Mailing Facility ID) and then clicks *Submit*. Any jobs that have been uploaded and their status will display.

Figure 65-3: Home Page - Common Errors

On the Common Errors Summary page, the user will see errors that have occurred and how many times they have occurred during upload (Figure 65-3)

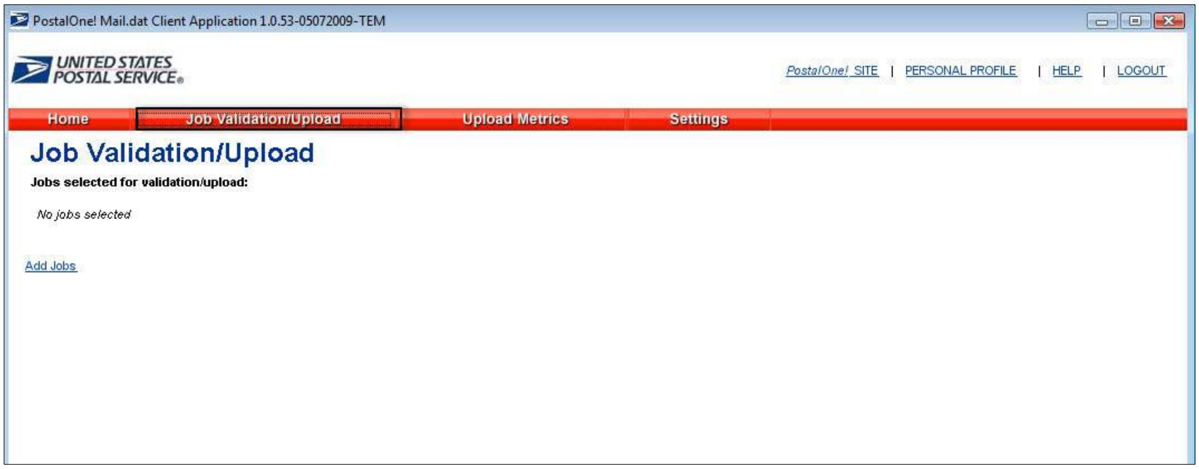


Figure 65.4: Job Validation/Upload

The user clicks the Job Validation/Upload tab in the red menu bar and will see the link for adding jobs (Figure 65-4). When the user clicks the ***Add Jobs* link,** a browser box appears to locate the files to upload.

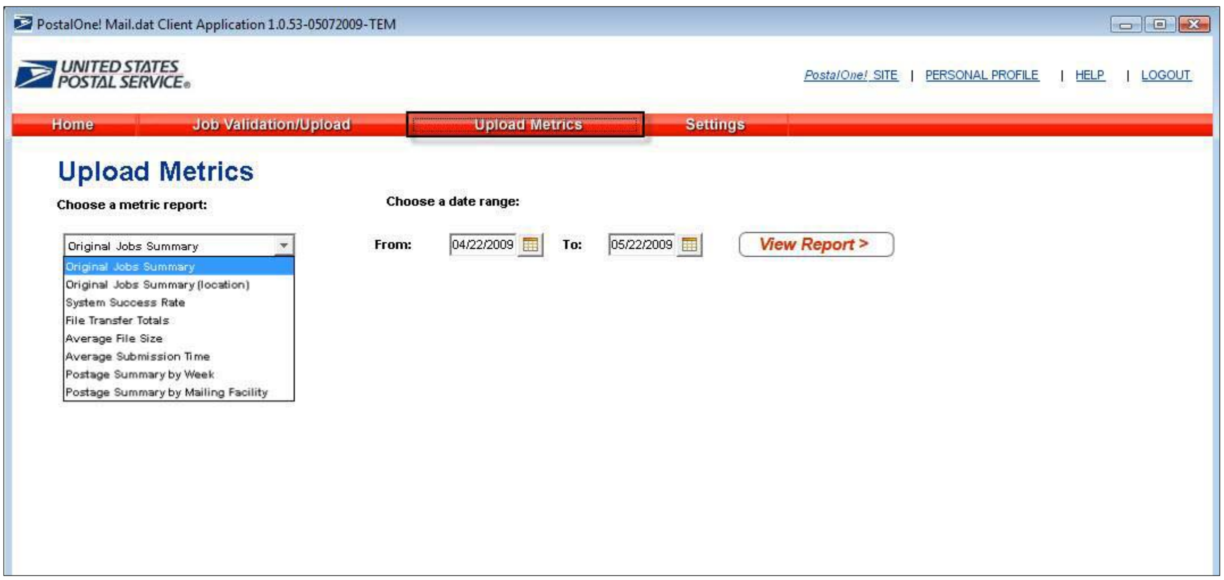


Figure 65.5: Upload Metrics

The user clicks the Upload Metrics tab in the red menu bar and selects criteria to generate a metrics report of the jobs uploaded (Figure 65.5).

The user reviews which jobs were successful or failed during Validation or Post-Upload. Metrics reports can be exported or printed (Figure 65-6).

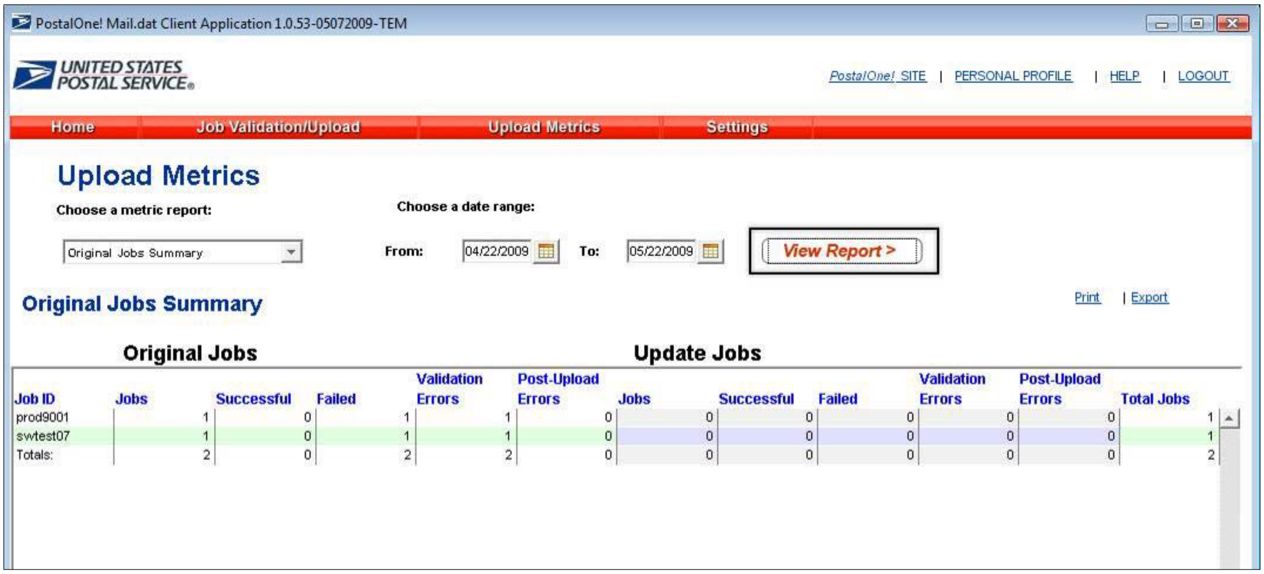


Figure 65-6: Upload Metrics - View Reports

The user sees which jobs were successful and failed, and where errors occurred during validation or the post-upload (Figure 65-6).

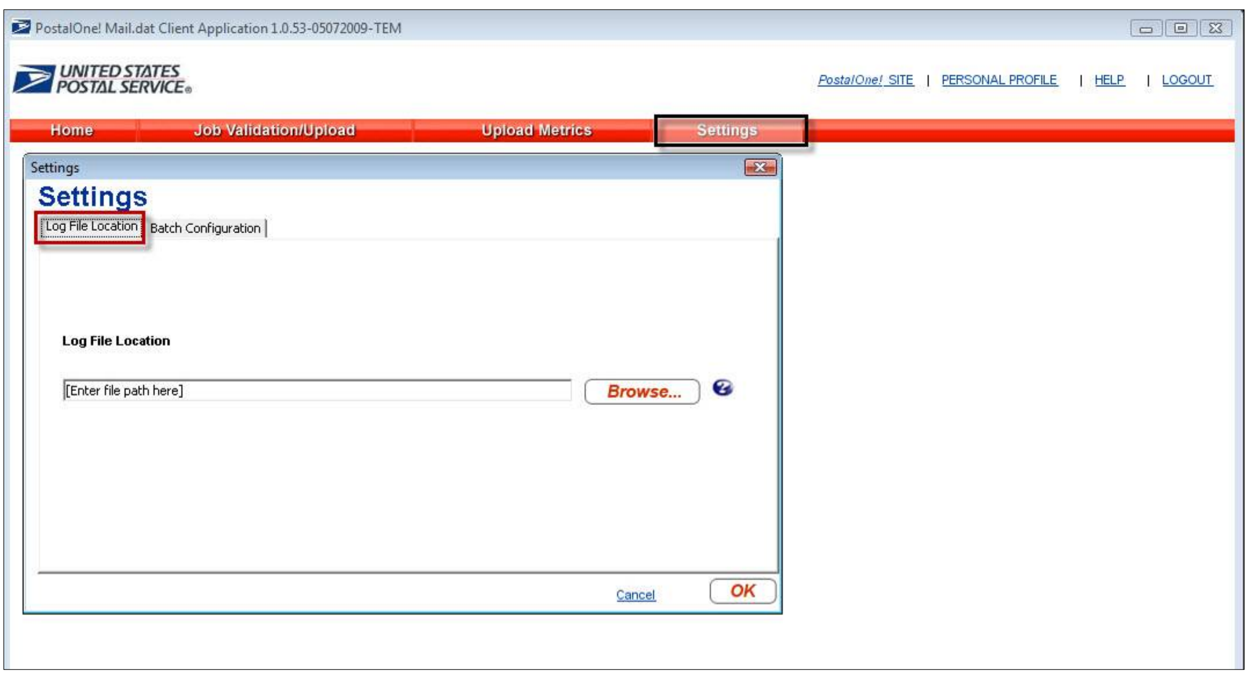


Figure 65-7: Settings - Log File Location

The user clicks the ***Setting tab*** in the red menu bar and sees a tab for Log File Location. The user can enter the file path or find the Log File location, using the Browse function (Figure 65-7).

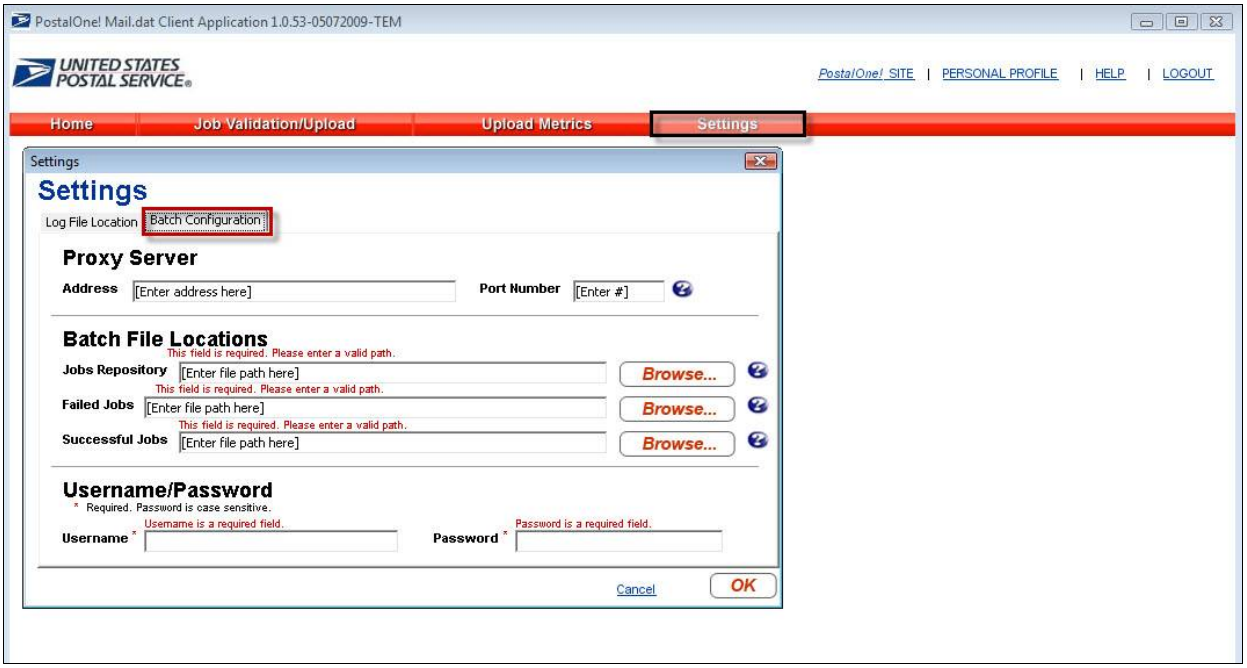


Figure 65-7: Settings - Batch Configuration

The user clicks the ***Batch Configuration*** tab and enters the settings needed for Batch Configuration, then clicks the *OK* button (Figure 65-7).

The user continues with the TEM process. Refer to the remainder of the TEM process section that follows.

③ **Notify the Help Desk by email to practice.** When the customer is ready to practice submitting files to the TEM, the customer initiates the practice process by sending the Help Desk a notification email and attaches the Full-Service Data Set-up Request Worksheets. The worksheets are designed to ensure that identification data is set up correctly and will prepare the Help Desk with verifying that the MIDs are all inclusive and the location associated to the MIDs are accurate (List of Mailer IDs Worksheet). This is for the purposes of USPS administrative purposes and does not restrict the use of Mailer IDs. For CRIDs use the “List of CRIDs Worksheet” to ensure that all MIDs are associated to the correct CRID and CRID location.

④ **Begin practice runs**. The customer uses the test scenarios that closely reflect their intended production plans when submitting files during practice.

⑤ **Notify the Help Desk by email to validate scenarios.** The customer initiates the test validation process by sending the Help Desk notification of readiness to begin meeting the test criteria. The Help Desk responds, assists mailers with the test scenario criteria, and provide technical assistance if necessary.

⑥ **Complete the TEM process.** The customer completes the required scenarios for each mail class by executing the test scenarios and meeting the criteria. The Help Desk will monitor that the test criteria are being met and completed.

⑦ **Wait for authorization**. Once the customer has successfully completed their Mail.dat file testing in the TEM, the Help Desk will notify the Business Mail Entry unit or Business Mail Support that the Mailer has completed the file testing and is ready to move to the production environment.

3.5.4 Parallel Testing

For Mailers with an alternate mailing agreement, there is a parallel test process. During parallel testing, the Mailer must send all Mail.dat files and postage statement updates for five consecutive business days to the *PostalOne!* system. During that time the Mailer must continue to provide hardcopy postage statements and hardcopy documentation (or other previously approved electronic documentation). A USPS acceptance employee will compare the hardcopy document to the electronic documentation to ensure values match. For Mailers that have their mail weight verified at the BMEU, no parallel test will be required.

In the parallel test process, the acceptance clerk will keep a copy of the hard copy postage statements, or have the original postage statements available for review at the end of the parallel run and the original hard copy documentation available at the DMU or BMEU for the verification review.

In the parallel test process, BMS will perform the on-site review immediately following the five-day period. The BMEU or BMS will execute the final approval process to move the Mailer to the Postal Service production environment. Refer to Appendix C for a scopte of the test criteria.

3.6 Facility Access & Shipment Tracking (FAST)/*PostalOne!* Hierarchy

For those users registering for FAST, in order to complete the registration process, the company for which the user registers, must be assigned to a *PostalOne!* hierarchy.

If the company for which a user is applying for access is not currently using *PostalOne!* services, the user must create a new corporation to allow the company to serve as the headquarters/corporate office in the *PostalOne!* system. If a user needs to associate the company to an existing corporation in *PostalOne!*, he/she can locate the existing corporation using that corporation’s Customer Registration ID (CRID).

The screens that follow demonstrate the general flow for creating the FAST/*PostalOne!* hierarchy. Refer to Figures 6-1 through 6-4.

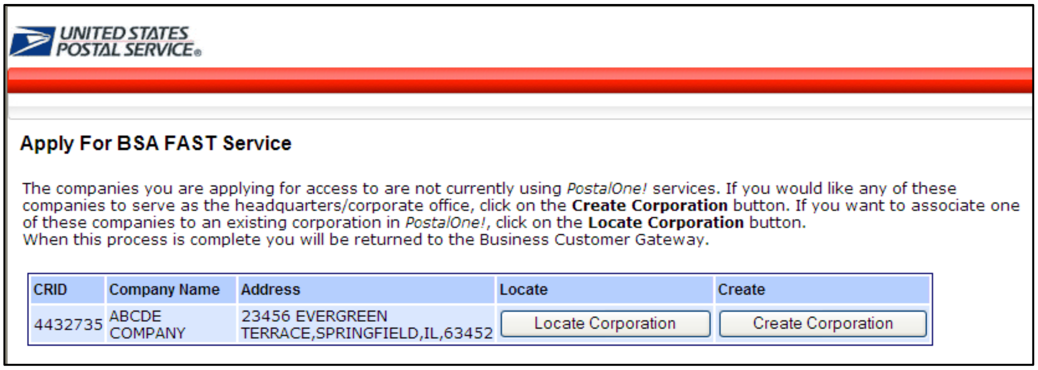


Figure 3-1: Applying for BSA FAST Service

To apply for BSA FAST Service, click the Locate Corporation button to proceed to the Apply for BSA FAST Service screen (Figure 3-1), where here a user may enter a CRID to locate an existing corporation in *PostalOne!* (Figure 3-2). Alternatively, the user may click the Create Corporation button to proceed to the Apply for BSA FAST Service page, where he/she may confirm that the company will be created as the headquarters/corporate office in *PostalOne!*.

If a user wishes to locate an existing corporation in *PostalOne!*, the Apply for BSA FAST Service page will display. The user enters a CRID number in the Enter CRID field, and clicks the Search button to search for the existing corporation.

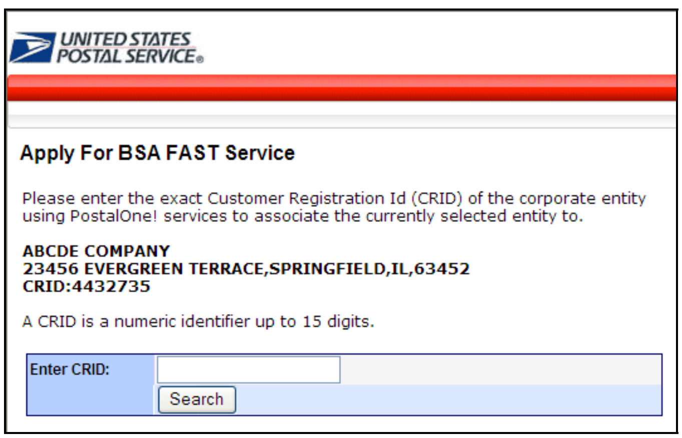


Figure 3-2: Locating an Existing Corporation within *PostalOne!*

After a user has located an existing corporation, the *Apply for BSA FAST Service Confirm* page will display. The user clicks the Confirm button to associate the existing corporation as the headquarters/corporate office in *PostalOne!* and proceeds to the Business Customer Gateway page.

Figure 3-3: Confirming an Existing Corporation as the Headquarters/Corporate Office

If a user wishes to create a new corporation in *PostalOne!* on the Apply for BSA FAST Service page (Figure 3-1), a similar screen will appear (Figure 3-4). The user clicks the Confirm button to create a new corporation in *PostalOne!* as the headquarters/corporate office and proceeds to the Business Customer Gateway page.

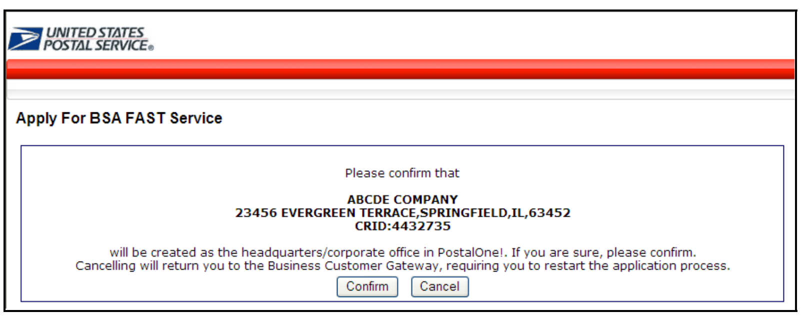


Figure 3-4: Confirming the Creation of a New Corporation as the Headquarters/Corporate Office

4 Full-Service Reports

The Business Customer Gateway captures all electronic mailing information provided by customers (also commonly referred to as electronic documentation), as well as service performance metrics and mailing quality information from the Postal Service Seamless Acceptance Service Performance (SASP) system. *PostalOne*! assisted by the new Business Customer Gateway system receives data from the SASP for Start-the-Clock, Container Visibility Scan data, Full-Service ACS COA and Nixie data. SASP enables information to be available through reports and data downloads.

The reports and available data are provided through the Gateway via the Mailing Reports page. Refer to Figure 4-1.The Business Customer Gateway also provides functionality to manage Mailer ID data distribution, where customers create data distribution profiles that allow what third parties to receive their data. For example if a Mail Owner employs a list management company (third party) to manage their addresses and address change updates; a Mailer ID profile once set-up, allows the change-of-address (COA) data to be routed to the designated third party. Refer to the section on Mailer ID set-up and profiles.

Full-Service ACS differs from both OneCode ACS and the traditional ACS programs in several ways, although all three processes provide similar information. The most notable differences involve three components.

- Pricing (Full-Service ACS is a no-cost service for specific time frames)
- Record format and layout
- Fulfillment method

Refer to Publication 8A (*Address Change Service – Traditional*) and Publication 8B (*OneCode ACS Technical Guide*) for full details on the record formats and data transmission methods of Traditional ACS and OneCode ACS. For Full-Service ACS, the electronic record format is different from those of both OneCode ACS and Traditional ACS, the information comes to the customer by a selection of different electronic channels and is a no-cost service (with the exceptions noted above). Refer to *A Guide to Intelligent Mail for Letters and Flats*, Section 4 for full details on the fulfillment methods.

For Intelligent Mail barcodes, users who choose OneCode ACS or Full-Service ACS, the Mailer ID in the Intelligent Mail barcode *must* be registered with ACS. Use of the Intelligent Mail barcode, in and of itself, does not automatically trigger ACS data collection and generation. New Mailer IDs will have a Full-Service ACS default profile created automatically. If mailers want no ACS services, Traditional ACS, OneCode ACS, or if they want options different from the default option for the new Mailer ID, they should contact the National Customer Support Center (NCSC) in Memphis after the MID is created. The NCSC will work with a mailer to ensure that the mailer's profile matches the desired mailpiece disposition and address correction handling.

4.1 Full-Service Reports Access

Reports for the Intelligent Mail Full-Service option include two reports: the Start-the-Clock and Full-Service ACS. Full-Service ACS reports are downloadable, compressed COA and Nixie files. Please refer to the Address Correction section below to understand the ACS offerings.

The Full-Service Reports are accessed from the new Business Customer Gateway landing page: the user selects ***Mailing Reports*** then ***Full Service Reports***. There are two primary reports: the Start-the-Clock and Full-Service ACS. Refer to Figure 4-2 and 4-3.

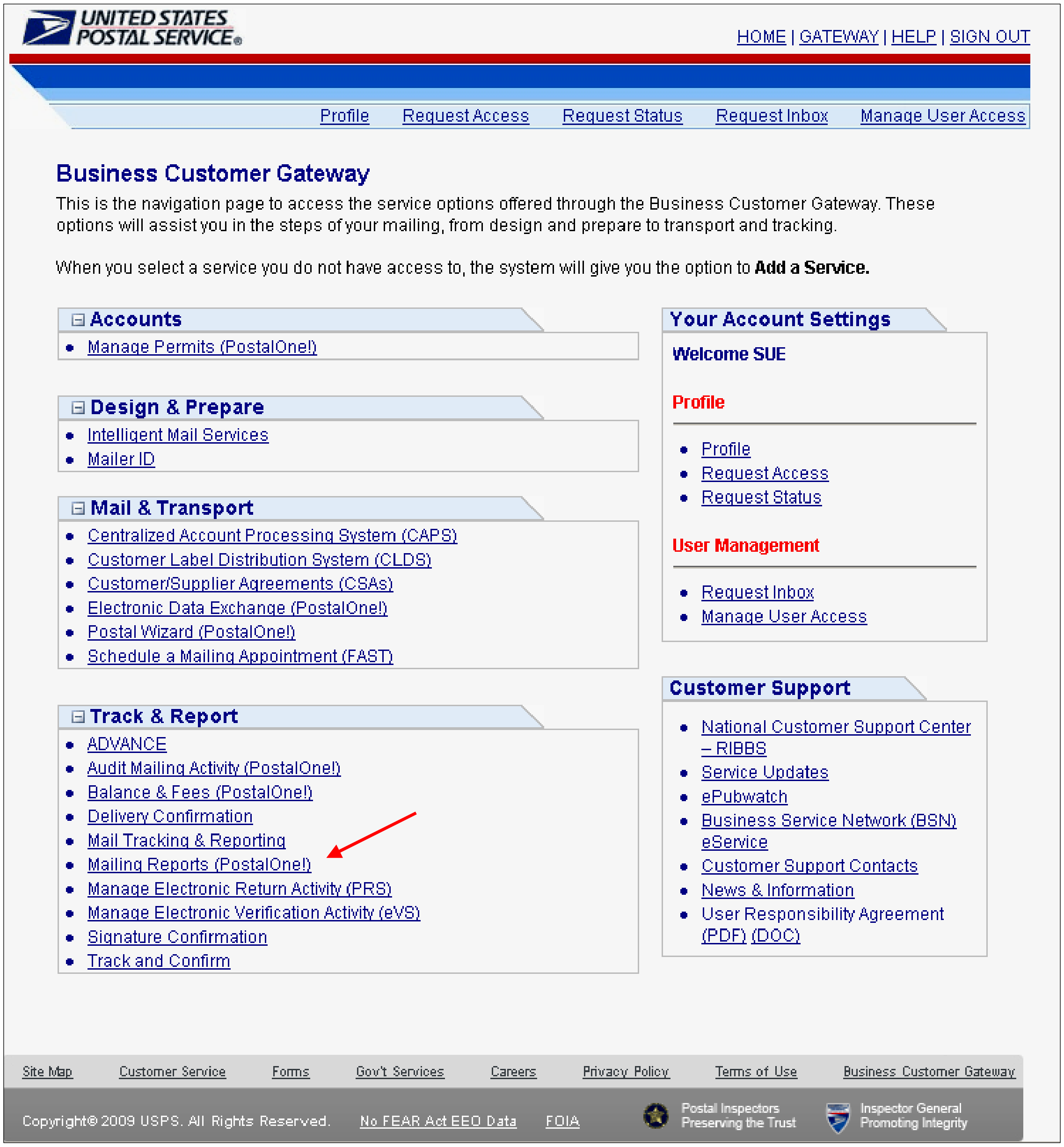


Figure 4-1

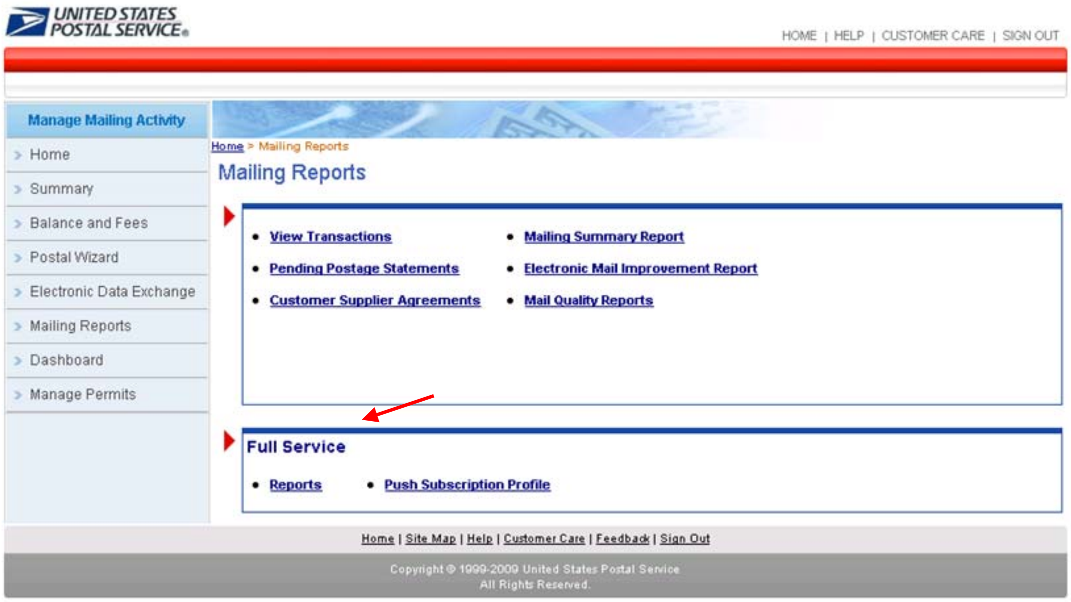
4.1.1 Full-Service Reports Features

The Full-Service Reports features are:

1) The Start-the-Clock report shows container scans, appointment, dispatch information and, whether the mail is *origin* entered or *destination* entered.

2) The Full-Service ACS reports allow users to query ACS records, display sample data, and enables the ability to download COA and Nixie data in Excel and CSV formats.

Figure 4-2: *PostalOne!* Mailing Reports Page



4.1.2 Start-the-Clock Summary Report

The system navigates the user to a new page (Figure 4-3), “Full-Service Reports” page, when the Full-Service Reports hyperlink is selected from the Mailing Reports page (Figure 4-2).
The system navigates the user to the new Start-the-Clock Reports page (Figure 4-4) when the “Start-the-Clock” hyperlink is selected. Users can then select the Start-the-Clock Summary Report hyperlink.

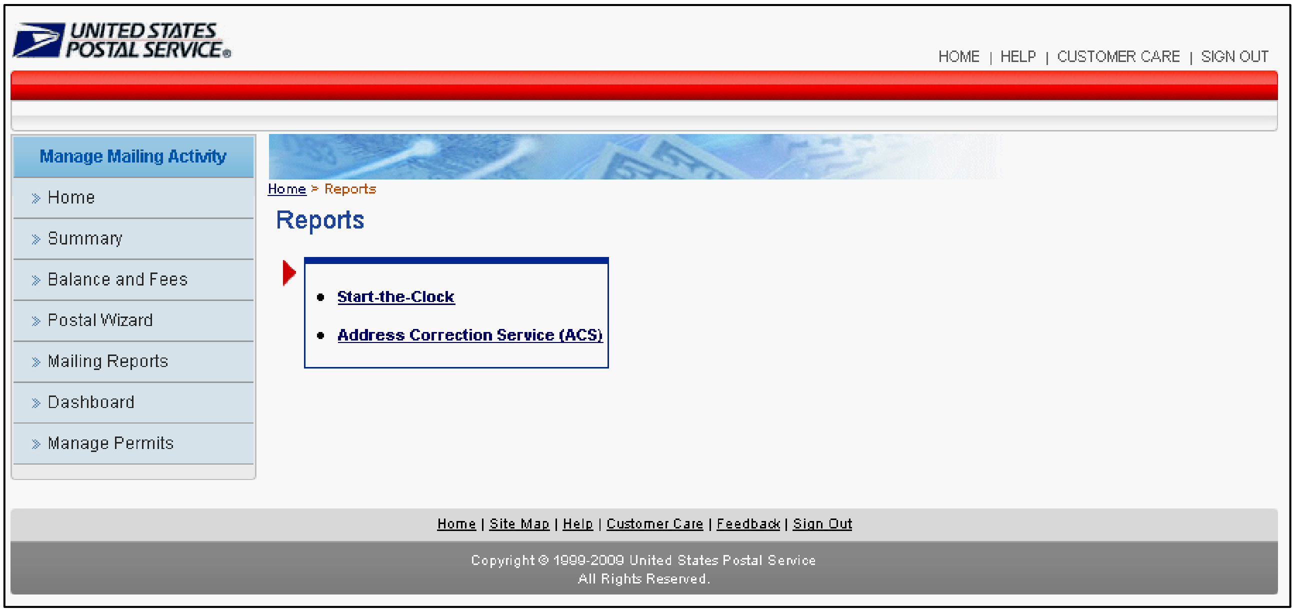


Figure 4-3: Full-Service Reports Page

The new Full-Service Reports page (Figure 4-3 above) displays two hyperlinks for accessing either the “Start-the-Clock” or “Address Correction Service” reports.

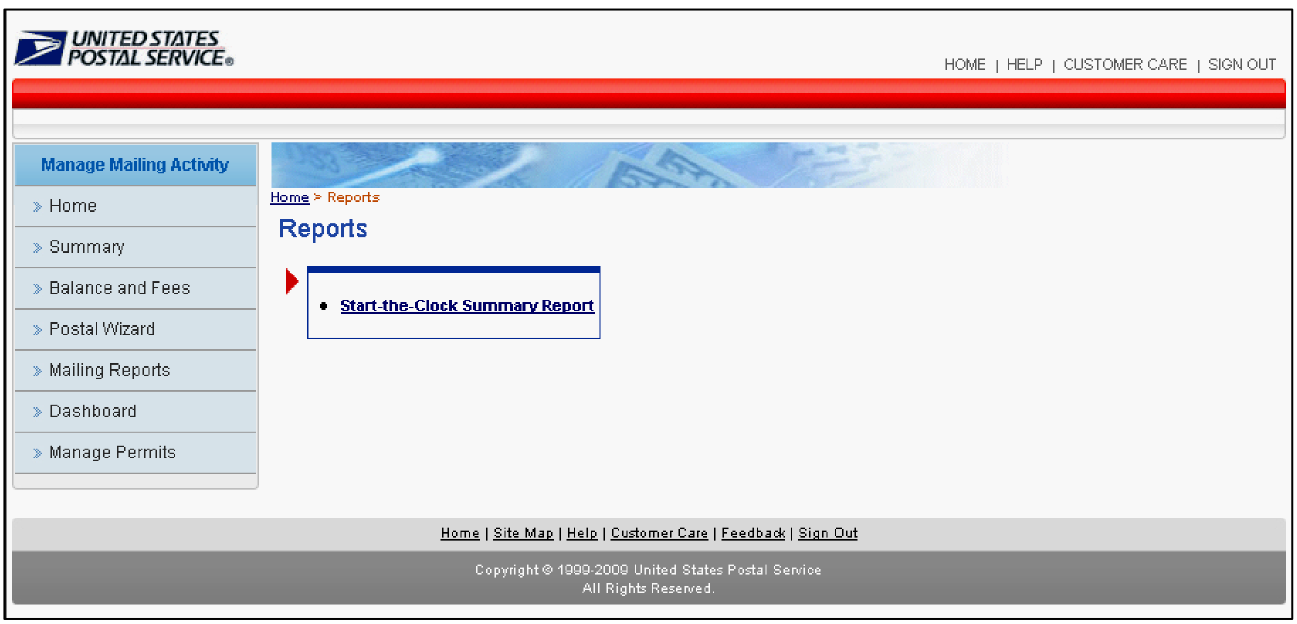


Figure 4-4: Start-the-Clock Summary Report Page

The Start-the-Clock Summary Report allows a user to track shipment and start the clock with scheduling or dispatch information. The report has drill down functionality derived from the Start-the-Clock record (search results) to Job ID to Appointment Number and finally to the Container Visibility/Scan data. Depending on the user-selected search criteria, the report will display information based on the search parameters. Refer to Figure 4-5.

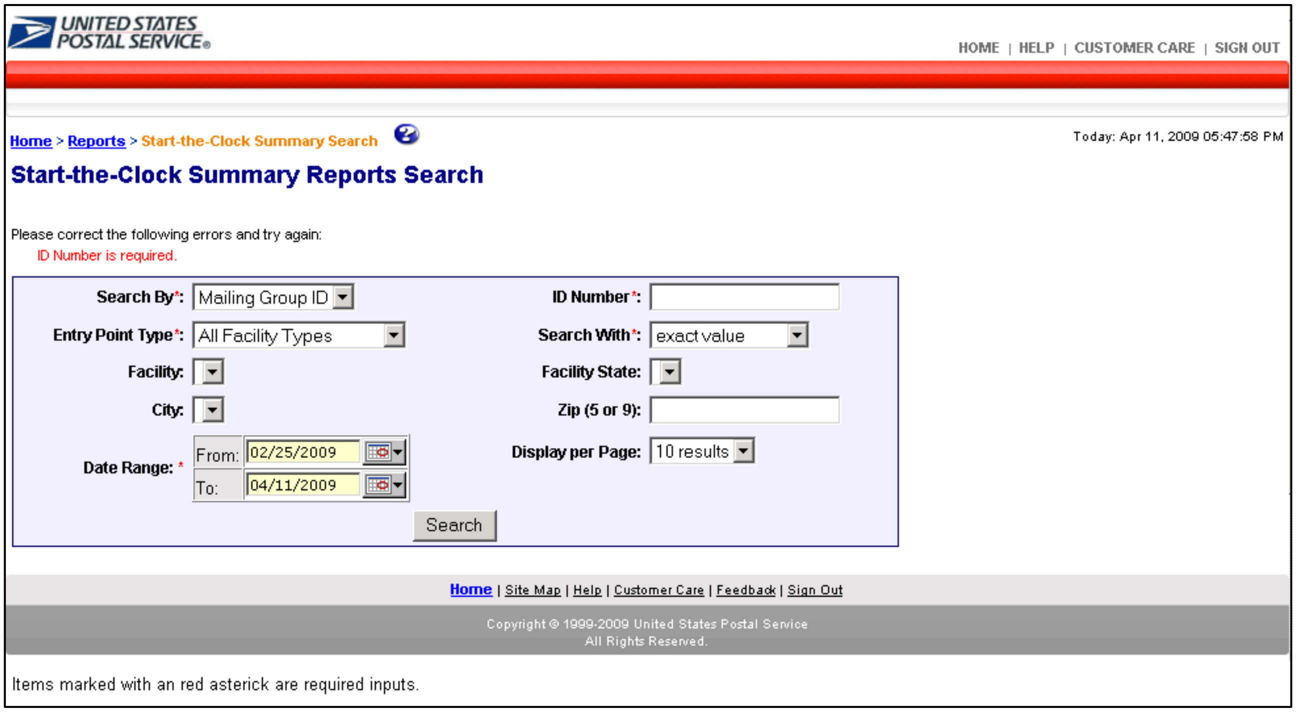


Figure 4-5: Start-the-Clock Summary Report Search Parameters

The system allows the user to build the report with search criteria and filters for Start-the-Clock. The first four fields require user inputs and/or selections.

Fields 1-4 below are Required Inputs.

1. Mailing Group ID or Job ID. The user selects an option from the dropdown menu.
2. ID Number. The user must enter a whole number.
3. Search With. The user selects one option from the dropdown menu. The option is a value attribute within the job ID number.
   a. exact value
   b. starting value
   c. ending value
   d. containing value
4. Entry Point Type. The options from the dropdown menu allow the user to refine the search by facility type.
   a. All Facility Types
   b. BMEU Origin
   c. Mailer Facility
   d. USPS Induction Facility
5. Entry Point Location

   The system will allow the user to further refine the search. These field selections are optional inputs.

a. Facility Name (dropdown menu)
b. City (dropdown menu)
c. Facility State (dropdown menu)
d. ZIP (the user must enter 5 or 9 characters)

6. Date Range. The user can select the Start and End dates or enter a date using the Calendar functional icon for both the start and end dates.

7. Display per Page. The options from the dropdown menu define the number of search results (data rows) to be displayed per screen page. The result set is paginated in fixed increments. The default is a maximum of 10 rows.
   a. 10
   b. 15
   c. 20

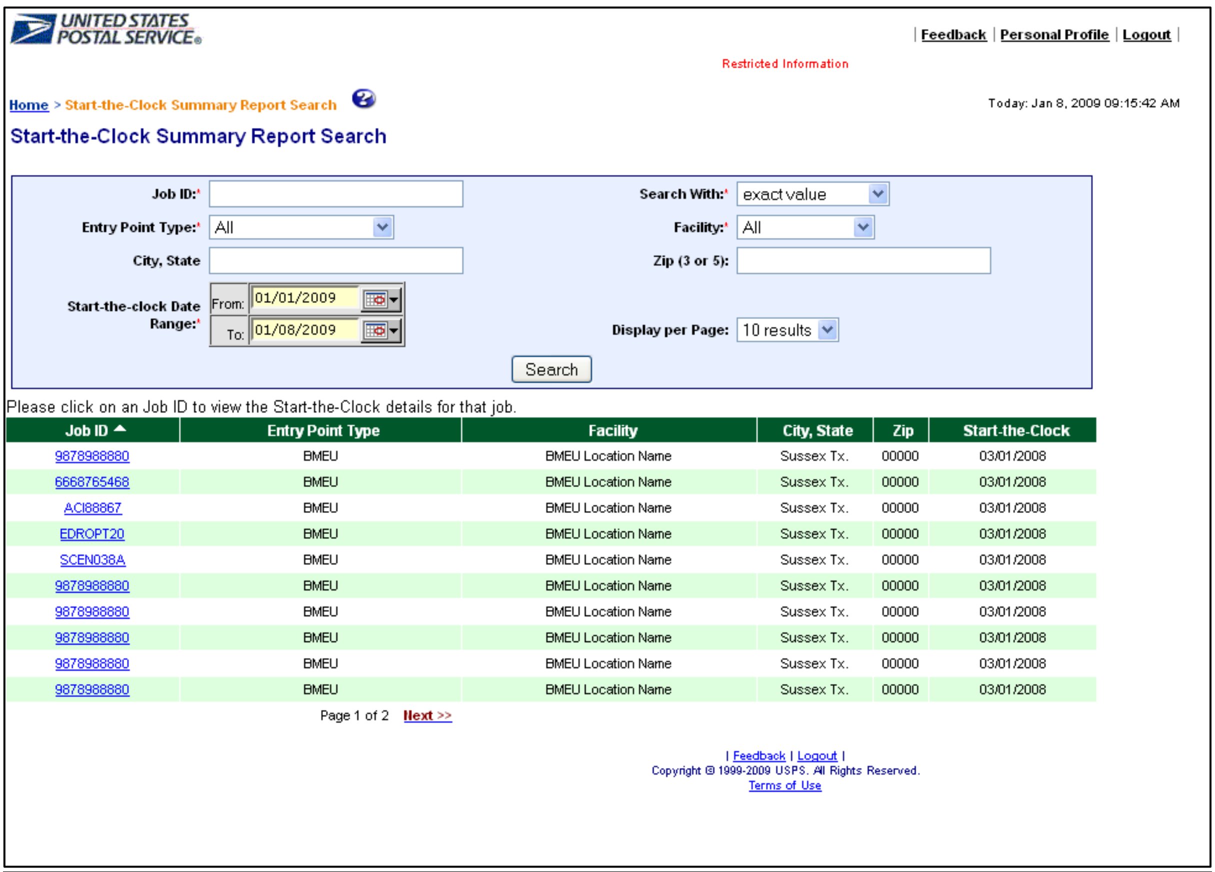


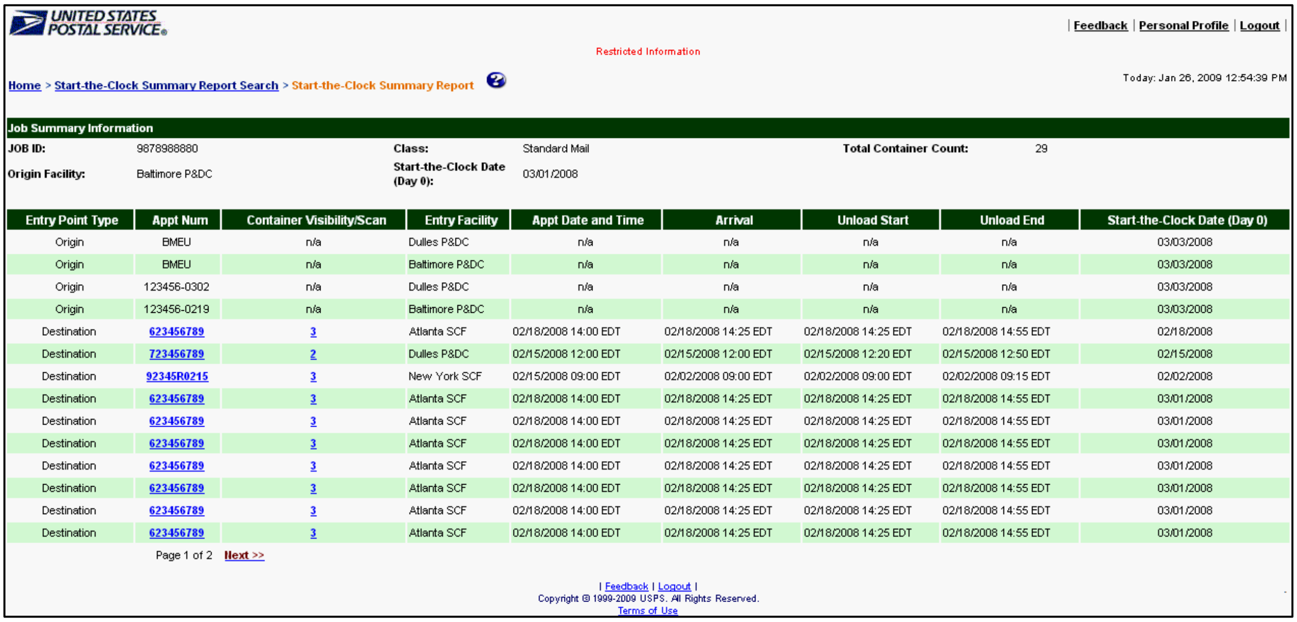
Figure 4.6: Start-the-Clock Summary Report Search Parameters

When the user clicks the *Search* button, the system returns Start-the-Clock data based on the report parameters defined by the user. The presentation of the data will display below the search input fields. Refer to Figure 4-6.

The Start-the-Clock Summary Report Data Columns

1. Job ID (hyperlink). This column lists the Job ID defined by the search criteria. A single Job ID number that when selected, directs the user to a new, standalone page that displays the data by Job ID (Refer to Figure 4-7).

2. Entry Point Type. This column displays the Entry Point Facility defined by the search criteria.
3. Facility. This column displays the Entry Point Facility name defined by the search criteria.
4. City, State (of entry point). This column displays the Entry Point Facility City and State.
5. ZIP. This column displays the Entry Point Facility ZIP code corresponding to the facility location.
6. Start-the-Clock. This column displays the Start-the-Clock date (Day 0) corresponding to the Job ID.


UNITED STATES POSTAL SERVICE

| Feedback | Personal Profile | Logout |

Restricted Information

Home > Start-the-Clock Summary Report Search > Start-the-Clock Summary Report

Today: Jan 26, 2009 12:54:39 PM

Job Summary Information

JOB ID:	9878988880	**Class:**	Standard Mail	**Total Container Count:**	29
Origin Facility:	Baltimore P&DC	**Start-the-Clock Date (Day 0):**	03/01/2008		

Entry Point Type	Appt Num	Container Visibility/Scan	Entry Facility	Appt Date and Time	Arrival	Unload Start	Unload End	Start-the-Clock Date (Day 0)
Origin	BMEU	n/a	Dulles P&DC	n/a	n/a	n/a	n/a	03/03/2008
Origin	BMEU	n/a	Baltimore P&DC	n/a	n/a	n/a	n/a	03/03/2008
Origin	123456-0302	n/a	Dulles P&DC	n/a	n/a	n/a	n/a	03/03/2008
Origin	123456-0219	n/a	Baltimore P&DC	n/a	n/a	n/a	n/a	03/03/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	02/18/2008
Destination	723456789	2	Dulles P&DC	02/15/2008 12:00 EDT	02/15/2008 12:00 EDT	02/15/2008 12:20 EDT	02/15/2008 12:50 EDT	02/15/2008
Destination	92345R0215	3	New York SCF	02/15/2008 09:00 EDT	02/02/2008 09:00 EDT	02/02/2008 09:00 EDT	02/02/2008 09:15 EDT	02/02/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008
Destination	623456789	3	Atlanta SCF	02/18/2008 14:00 EDT	02/18/2008 14:25 EDT	02/18/2008 14:25 EDT	02/18/2008 14:55 EDT	03/01/2008

Page 1 of 2 Next >>

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Figure 4-7: Start-the-Clock Summary Report by Job ID - User clicks a JobID hyperlink

The system displays the Start-the-Clock Summary/Job ID report on a new separate page (Figure 4-7) when the user selects the Job ID hyperlink from Start-the-Clock Summary Report (Figure 4-6).

The system displays the Start-the-Clock information per the associated Job ID. This view by Job ID, displays the Job ID Summary information and nine data columns.

The Job Summary Information section includes five elements.

1. Job ID
2. Class (mail class)
3. Total Container Count (sum of all containers/pallets for per the single Job ID
4. Origin Facility
5. Start-the-Clock Date (Day 0)

Job ID Summary information presents ten data columns.

1. Entry Point Type. There are two possible values Origin or Destination.
2. Appt Num (Appointment Number). The Appt Num that when selected, the system will display a separate, standalone report that displays information per the single Start-the-Clock Summary Report Appt Num (refer to Figure 4-8). The system returns/displays Appointment Number information only if Entry Point type is *Destination*. The Appt Num hyperlink will be enabled.

3. Container Visibility/Scan. This column displays the number of scans corresponding to the Appointment Number. The number is hyperlinked-enabled to Container Visibility/Scan information (Figure 4-9). The hyperlink is enabled only if the entry point is *Destination*.
4. Entry Facility. This column displays the name of entry point facility.
5. Appt Date and Time
6. Arrival (date and time)
7. Unload Start (date and time)
8. Unload end (date and time)
9. Start-the Clock Date (Day 0)

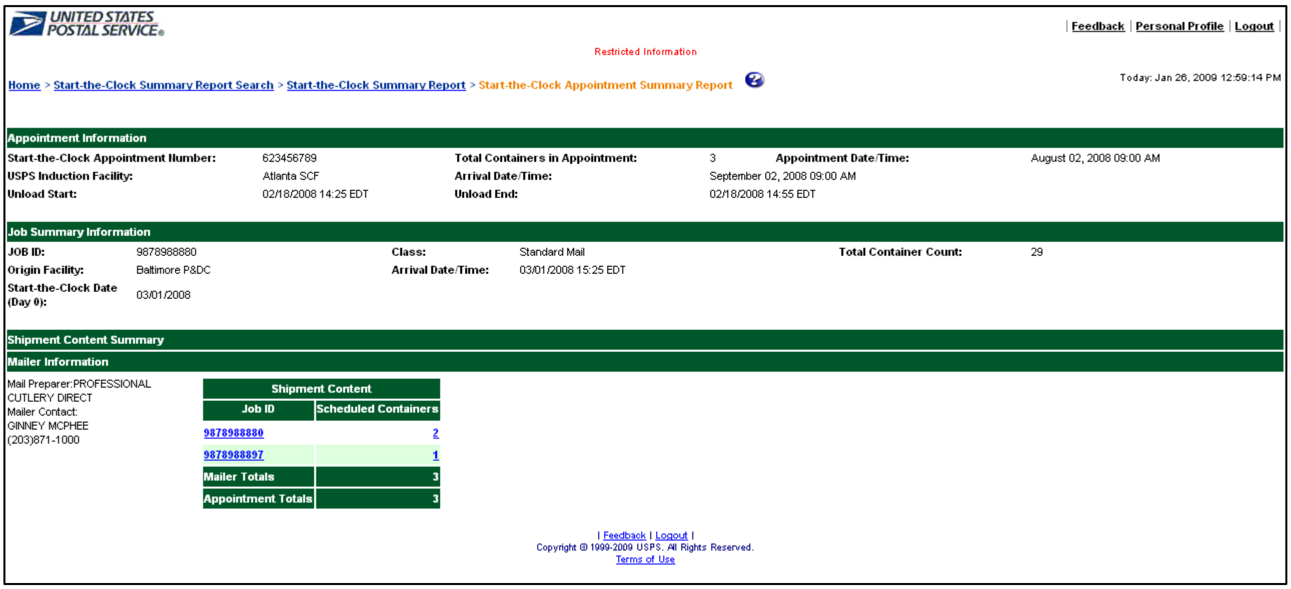


Figure 4-8: Start-the-Clock Appointment Summary by Appt Num - User clicks an Appt Num hyperlink

The system displays the Start-the-Clock Appointment Summary by Appt Num Report on a new, separate page (Figure 4-8) when the user selects a single Appt Num hyperlink from the Start-the-Clock Summary/Job ID Report.

The system displays the Start-the-Clock Appointment Number information. This (Appt Num) view displays the Appt Num Summary information and seven data columns.

The Start-the-Clock Summary Appointment Number Information section includes seven elements.

1. Start-the-Clock appointment number
2. USPS Induction Facility
3. Unload Start (date and time)
4. Total Containers in Appointment
5. Appointment Date and Time
6. Arrival (date and time)
7. Unload End (date and time)

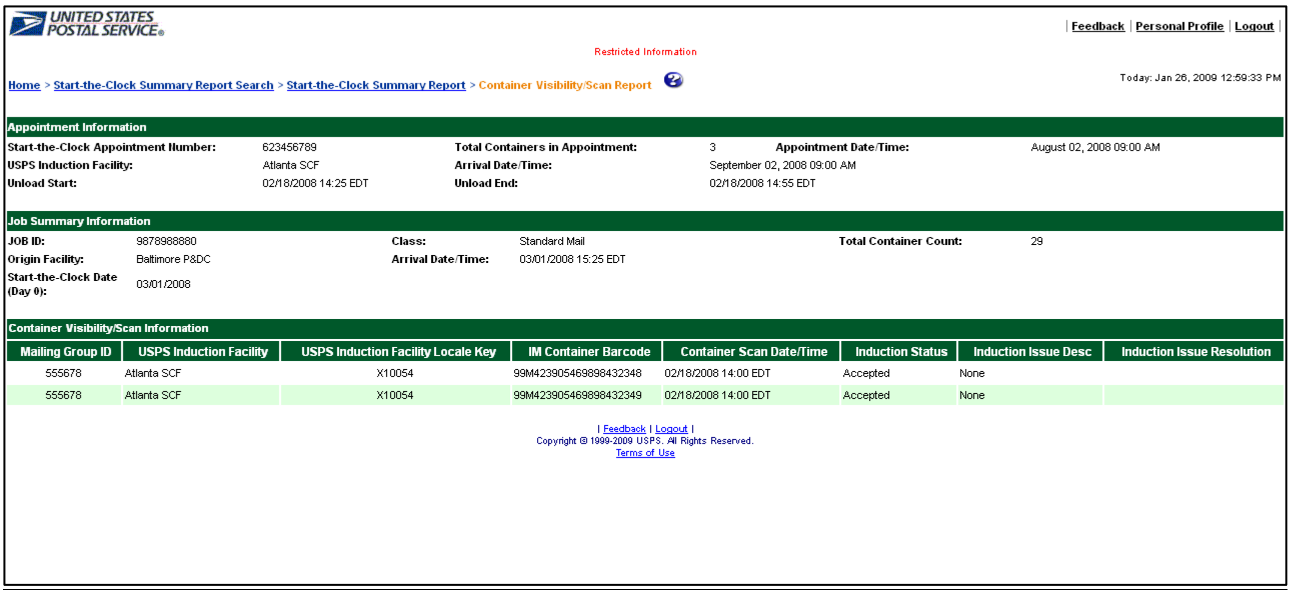
The Job Summary Information section is static, retained from the same Start-the-Clock Summary by Job ID.

1. Job ID

2. Class (mail class)
3. Total Container Count (sum of all containers/pallets for per the single Job ID)
4. Origin Facility
5. Start-the-Clock Date (Day 0)

The Shipment Content Summary section displays Mailer Preparer information and contact data, including a Mailer contact Phone number. The Shipment Content section provides four data elements.

1. Job ID hyperlink. When the Job ID hyperlink is selected, the user is redirected to the Start-the-Clock Summary Report associated with the Job ID.
2. Scheduled Container hyperlink. This column displays the container count. When the *count* hyperlink is selected, the user is redirect to Container Visibility/Scan Information (Figure 4-9).
3. Mailer Totals. This is the sum of all scheduled containers within the Shipment Content.
4. Appointment Totals. This is the sum of all appointments within the Shipment Content.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Restricted Information

Home > Start-the-Clock Summary Report Search > Start-the-Clock Summary Report > Container Visibility/Scan Report

Today: Jan 26, 2009 12:59:33 PM

Appointment Information

Start-the-Clock Appointment Number:	623456789	Total Containers in Appointment:	3	Appointment Date/Time:	August 02, 2008 09:00 AM
USPS Induction Facility:	Atlanta SCF	Arrival Date/Time:	September 02, 2008 09:00 AM		
Unload Start:	02/18/2008 14:25 EDT	Unload End:	02/18/2008 14:55 EDT		

Job Summary Information

JOB ID:	9878988880	Class:	Standard Mail	Total Container Count:	29
Origin Facility:	Baltimore P&DC	Arrival Date/Time:	03/01/2008 15:25 EDT		
Start-the-Clock Date (Day 0):	03/01/2008				

Container Visibility/Scan Information

Mailing Group ID	USPS Induction Facility	USPS Induction Facility Locale Key	IM Container Barcode	Container Scan Date/Time	Induction Status	Induction Issue Desc	Induction Issue Resolution
555678	Atlanta SCF	X10054	99M423905469898432348	02/18/2008 14:00 EDT	Accepted	None	
555678	Atlanta SCF	X10054	99M423905469898432349	02/18/2008 14:00 EDT	Accepted	None	

| Feedback | Logout |
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Terms of Use

Figure 4-9: Start-the-Clock Appointment Summary Report by Container Content Information

The system displays the Container Visibility/Scan information on a new separate page (Figure 4-9) when the user selects a Scheduled Container number hyperlink from the Shipment Content section of the Start-the-Clock Appointment Summary/Appt Num reporting. The Container Visibility/Scan information displays seven data columns.

The Appointment Information section is static, retained from the Start-the-Clock Summary Appointment Number Information report.

1. Start-the-Clock appointment number
2. USPS Induction Facility
3. Unload Start (date time)
4. Total Containers in Appointment
5. Appointment Date/Time
6. Arrival Date/Time
7. Unload End (Date/Time)

The Job Summary Information section is static, retained from the same Start-the-Clock Summary by Job ID Information report:

1. Job ID
2. Class (mail class)
3. Total Container Count (sum of all containers/pallets for per the Job ID)
4. Origin Facility
5. Start-the-Clock Date (Day 0)

The Container Visibility/Scan Information section presents eight data columns.

1. Mailer Group ID
2. USPS Induction Facility
3. USPS Induction Facility Locale Key
4. (Intelligent Mail)IM Container Barcode (Intelligent Mail)
5. Container Scan Date/Time
6. Induction Status
7. Induction Issue Desc
8. Induction Issue Resolution

4.1.3 Download Full-Service ACS Reports

The system navigates the user to the new Full-Service ACS COA and Nixie Detail Reports page (Figure 4-10 below) when the "Address Correction Service (ACS)" hyperlink is selected from the Full-Service Reports page (Refer to Figure 4-3).

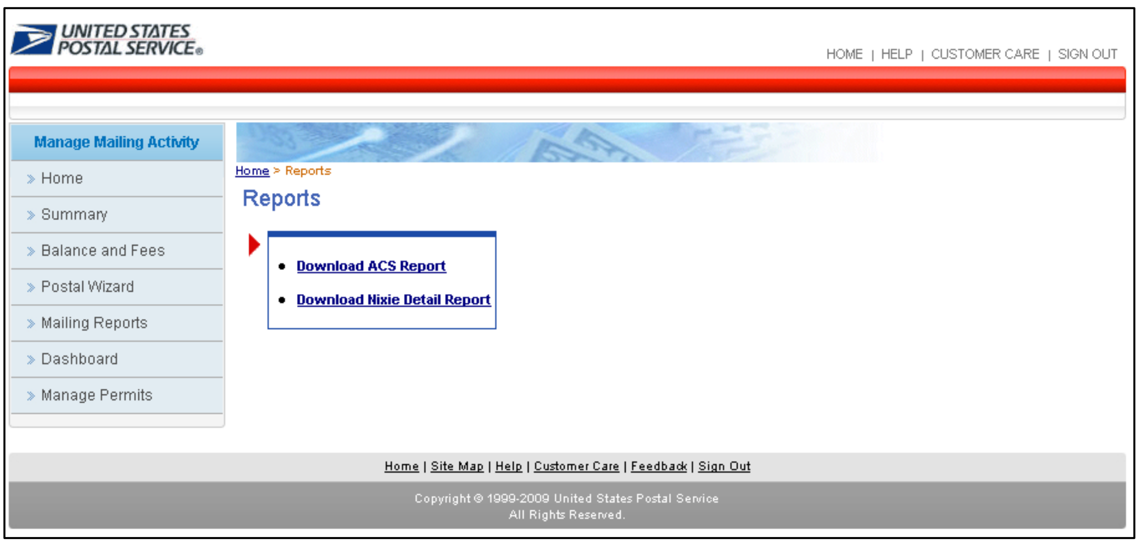


Figure 4-10: Full-Service ACS Reports

The Full-Service ACS reports enable two options (Please refer to Appendix A for the Full-Service ACS header record information and delimited file layout. Appenix B has been included for a view into the new file format to be implemented in the July 2009 release):

1. The Download ACS Report, which allows the user to search ACS records, display sample data, and download the data set(s) in a CSV or Excel format.

2. The Nixie Details Report, which allows the user to search Nixie Detail records, display sample data, and download the data set(s) in a CSV or Excel format.

The system displays the Download ACS Report and search criteria selections screen on a new separate page when the user selects the Download ACS Report link (Figure 4-11). The report can be queried by four required input parameters.

Fields 1-4 below are Required Inputs.

1. **Mailing Group ID** or **Job ID** (dropdown menu)
2. **ID Number** (user must enter a whole number)
3. **Search With.** The user selects one option from the dropdown menu. The option is a value attribute within the job ID number.
   a. exact value
   b. starting value
   c. ending value
   d. containing value
4. **Record creation Date Range**. The user can enter a date or select a date using the Calendar functional icon for both the start and end dates.

When the user clicks the Search button, the system displays the data online. The user has the option to download the data in CSV or Excel formats using the dropdown menu. Refer to Figure 4-11.

The system displays a system download message that will allow users the option to save the search results to their local (computer) drive.

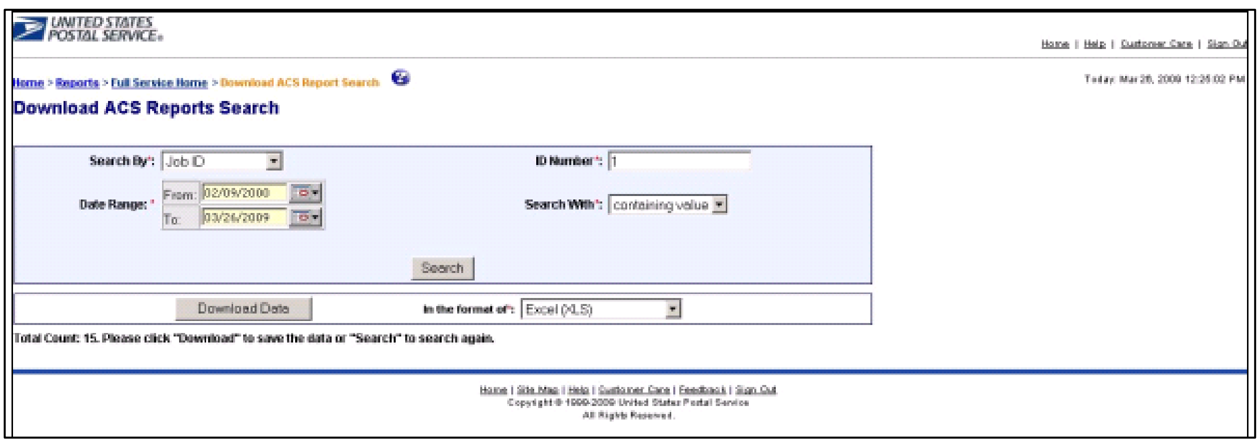


Figure 4-11: Full-Service ACS COA Report

4.1.4 Full-Service ACS Nixie Detail Report

The system displays the Full-Service ACS Nixie Detail Report and search criteria selections screen on a new separate page when the user selects the Full-Service ACS Nixie Detail Report link. The report can be searched by four user-required input and/or selections. (Please refer to Appendix A for the header record information for the Full-Service ACS Nixie delimited file layout, and Appenix B for the new file format to be implemented in the July 2009 release).

Fields 1 -4 below are Required Inputs.

1. **Mailing Group ID** or **Job ID** (dropdown menu)
2. **ID Number** (user must enter a whole number)
3. **Search With.** The user selects one option from the dropdown menu. The option is a value attribute within the job ID number.
   a. exact value
   b. starting value
   c. ending value
   d. containing value
4. **Record creation Date Range**. The user can enter a date or select a date using the Calendar functional icon for both the start and end dates.

When the user selects the Search button, the system displays the data online. The user has the option to download the data in CSV or Excel formats using the dropdown menu. Refer to Figure 4-12.

The system displays a system download dialog box that will allow users the option to save the search results to their local (computer) drive.

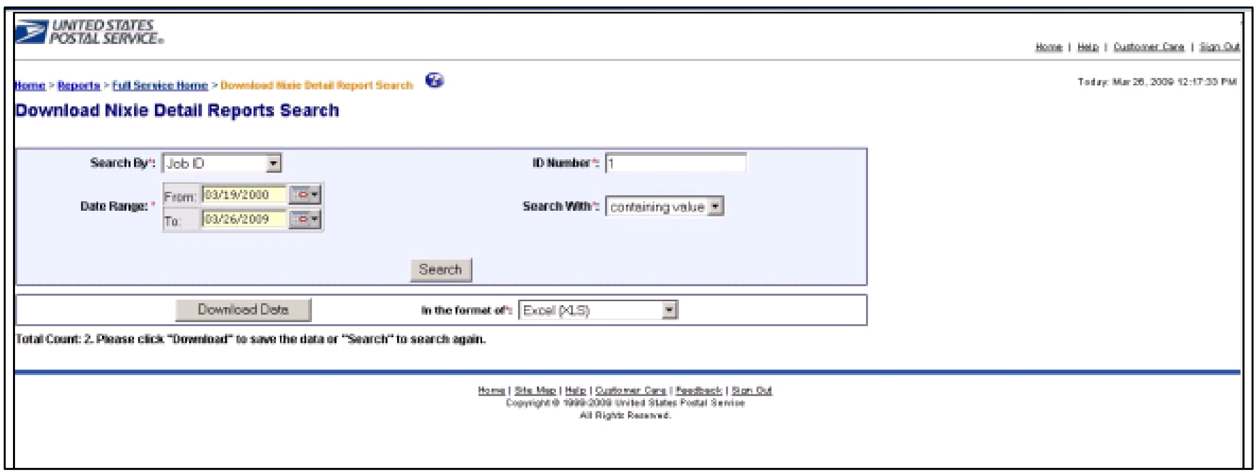


Figure 4-12: Full-Service ACS Nixie Detail Repor

Revision History

Full-Service ACS Nixie Detail and Full-Service ACS COA Detail Report Download Code			
Description	**Author**	**Version**	**Date**
Changed Appendix A: Layout of Full-Service ACS Nixie Detail and Full-Service ACS COA Detail Report download file format. Revised to show data elements as currently provided by the software.	J. Cabatu	4.0	6/12/2009
Added Appendix B: Layout of Full-Service ACS Nixie Detail and Full-Service ACS COA Detail Report scheduled for July Release. Appendix B demonstrates data elements to be provisioned in the upcoming July patch release.	Michael Haskin	4.1	6/12/2009
Changed Appendix B: Layout of Full-Service ACS Nixie Detail and Full-Service ACS COA Detail Report scheduled for July Release. Changed date fields: RecordCreationDate, MoveEffectiveDate, and RecordCreationDate. All three fields are concatenated to include a timestamp.	Michael Haskin / J. Cabatu	4.2	6/25/2009

Appendix A – Layout of Full-Service ACS Nixie Detail and Full-Service ACS COA Detail Report

Download Layout of Full-Service ACS Nixie Detail Report

Note the delimited files will contain a file header record (refer to the header record field column)

Header Record Field (1st record of download)	Field Description	Data Type	Field Length	Possible Values
Mailing Group	Mailing Group ID	Numeric		Default 0 (nonNegativeInteger)
Job ID	Mailpiece JOB ID	Numeric	8	
Original MB	Intelligent Mail Barcode	Alpha/Numeric	34	
Record Creation Date	Record Create Date	Numeric	10	mm/dd/yyyy
Action Code	Identifies action taken for the returned mail	Alpha	1	F = Forwarded W = Wasted R = Returned U = Unable to determine action
Parsed Address on Piece	On Piece Address	Alpha/Numeric	100	NCSC takes a valid 11-digit from the IM barcode of the piece and does a reverse lookup to generate the address. If the routing code in the IM barcode is not a valid 11 digit, no information will be provided
On Piece City State ZIP	On Piece City, State Zip	Alpha/Numeric	100	
Reason Code	Reason for nondelivery Code	Alpha	1	A = Attempted, not known B = Returned for better address D = Outside delivery limits E = In dispute I = Insufficient Address L = Illegible M = No mail receptacle N = No such number P = Deceased Q = Not deliverable as addressed/unable to forward R = Refused S = No such street U = Unclaimed V = Vacant X = No such office
Return to Address	Return Piece Address	Alpha/Numeric	100	
Return to City State ZIP	Return Piece City, State Zip	Alpha/Numeric	100	
Keyline from eDOC	Keyline from electronic documentation	Alpha/Numeric	50	Traditional keyline data. Note if the character is a null value, the system displays a "NA" in the keyline field.
Fee Notification	Identifies any fee associated with the record	Alpha	3	
Class/Notification Type	Class Notification Type	Alpha	1	A = Package Services (Bound Printed Matter) B = First-Class C = Periodicals Initial D = Standard Mail F = Periodicals Follow-up
Mailer ID 6	6 Digit Mailer ID	Numeric	6	Only one of the Mailer ID's can be provided (Either 6 or 9 digit Mailer ID). For the Mailer ID that does not apply, it will default to "NA".
Mailer ID 9	9 Digit Mailer ID	Numeric	9	

Layout of Full-Service ACS COA Detail Report

Note the delimited files will contain a file header record (refer to the header record field column).

Header Record Field	Field Description	Data Type	Field Length	Possible Values
Mailing Group ID	Mailing Group ID	Numeric		Default 0 (nonNegativeInteger)
Job ID	Mailpiece JOB ID	Numeric	8	
Original IMB	Intelligent Mail Barcode	Alpha/Nmeric	34	
Record Creation Date	Record Create Date	Numeric	10	mm/dd/yyyy
Move Effective Date	Move Effective Date	Numeric	10	mm/dd/yyyy
Move Type	Type of move	Alpha	1	I - Individual; F- Family or B - Business
Deliverability Code Type	Delivery Code Type	Alpha	1	<blank> = COA Match with new address K = COA Match, no forwarding address G = COA Match, PO Box Closed, no forwarding address W = COA Match with a temporary COA. Note: Foreign addresses are currently not supported by *PostalOne!* SASP file structures.
COA Name	Recipient Name	Alpha	100	Prefix (space) FirstName (space) LastName (space) suffix. Note if the character is a null value, the system displays a "NA" for the prefix and sufix fields.
Business Name	Business Name	Alpha	100	*
Keyline from eDoc	Keyline from electronic documentation	Alpha	100	*
Old Address Type	Old Address Type	Alpha/Nmeric	1	G = General Delivery H = Highway Contract Route P = Post Office Box R = Rural Route S = Street Address
Old Urbanization Name	Old Urbanization Name	Alpha/Nmeric	100	* Note if the character is a null value, the system displays a "NA" in the field.
Parsed Old Address	Old Street Name	Alpha/Nmeric	28	
Old City	Old City	Alpha/Nmeric	28	
Old State	Old State	Alpha/Nmeric	2	
Old ZIP	Old 5 Digit ZIP Plus 4	Numeric	10	Exapmle: 15120-2325
New Address Type	Address Type New	Numeric	1	G = General Delivery H = Highway Contract Route P = Post Office Box R = Rural Route S = Street Address

ACS .csv and Excel download file format continues

Field Name	Field Description	Data Type	Field Length	Possible Values
New Urbanization Name	New Urbanization Name	Alpha/Nmeric	100	* Note if the character is a null value, the system displays a "NA" in the field.
Parsed New Address	Parsed New Address	Alpha/Nmeric	28	
New City	City New	Alpha/Nmeric	28	
New State	State New	Alpha/Nmeric	2	
New ZIP	5 Digit ZIP Plus 4 New	Numeric	10	
PMB	Private Mail Box	Alpha/Nmeric	37	Note if the character is a null value, the system displays a "NA" in the field.
Class Notification Type	Class Notification Type	Alpha	1	A = Package Services (Bound Printed Matter) B = First-Class C = Periodicals Initial D = Standard Mail F = Periodicals Follow-up
Fee Notification	Identifies any fee associated with the record	Alpha/Nmeric	3	
Mailer ID 6	6 Digit Mailer ID	Numeric	6	
Mailer ID 9	9 Digit Mailer ID	Numeric	9	

* data should be limited to just the number of characters needed

Appendix B: Layout of Full-Service ACS Nixie Detail Report CSV and Excel Format planned for the July Patch Release

Report Column Name	Column Type and size	Mail.XMl Element Namer
OriginalMailerID6	String (6)	<xs:element name="OriginalMailerID6" type="mailxml_base:mailerID6Type"/>
OriginalMailerID9	String (9)	<xs:element name="OriginalMailerID9" type="mailxml_base:mailerID9Type"/>
UserLicenseCode	String (4)	<xs:element name="UserLicenseCode" type="mailxml_base:userLicenseCodeType"/>
MaildatJobID	String (8)	<xs:element name="MaildatJobID" type="mailxml_base:jobIDType"/>
CustomerGroupID	String (25)	<xs:element name="CustomerGroupID" type="mailxml_base:s25"/>
MailingGroupID	Number	<xs:element name="MailingGroupID" type="xs:nonNegativeInteger"/>
OriginalIMB	String (34)	<xs:element name="OriginalIMB" type="mailxml_base:iMBType"/>
RecordCreationDate	mm/dd/yyyy 00:00:00	<xs:element name="RecordCreationDate" type="xs:date"/>
ActionCode	String (1)	<xs:element name="ActionCode" type="mailxml_base:actionCodeType"/>
ParsedAddressOnPiece	String (100)	<xs:element name="ParsedAddressOnPiece" type="xs:string"/>
OnPieceCityStateZip	String (100)	<xs:element name="OnPieceCityStateZip" type="xs:string"/>
ReturnedToAddress	String (100)	<xs:element name="ReturnedToAddress" type="xs:string"/>
ReturnedToCityStateZip	String (100)	<xs:element name="ReturnedToCityStateZip" type="xs:string"/>
ReasonCode	String (1)	<xs:element name="ReasonCode" type="mailxml_base:reasonCodeType"/>
KeylineFromEDoc	String (50)	<xs:element name="KeylineFromEDoc" type="xs:string"/>
ClassNotificationType	String (1)	<xs:element name="ClassNotificationType" type="mailxml_base:classNotificationType"/>
FeeNotification	String (3)	<xs:element name="FeeNotification" type="mailxml_base:yesNo"/>

Layout of ACS Detail download file (Excel and CSV) - July Patch Release

Report Column Name	Column Type and size	Mail.XMl Element Namer
UserLicenseCode	String (4)	<xs:element name="UserLicenseCode" type="mailxml_base:userLicenseCodeType"/>
MaildatJobID	String (8)	<xs:element name="MaildatJobID" type="mailxml_base:jobIDType"/>
CustomerGroupID	String (25)	<xs:element name="CustomerGroupID" type="mailxml_base:s25"/>
MailingGroupID	Number	<xs:element name="MailingGroupID" type="xs:nonNegativeInteger"/>
OriginalMailerID6	String (6)	<xs:element name="OriginalMailerID6" type="mailxml_base:mailerID6Type"/>
OriginalMailerID9	String (9)	<xs:element name="OriginalMailerID9" type="mailxml_base:mailerID9Type"/>
OriginalIMB	String (34)	<xs:element name="OriginalIMB" type="mailxml_base:iMBType"/>
RecordCreationDate	mm/dd/yyyy 00:00:00	<xs:element name="RecordCreationDate" type="xs:date"/>
MoveEffectiveDate	mm/dd/yyyy 00:00:00	<xs:element name="MoveEffectiveDate" type="xs:date"/>
MoveType	String (1)	<xs:element name="MoveType" type="mailxml_base:addressCorrectionMoveType" minOccurs="0"/>
DeliverabilityCodeType	String (1)	<xs:element name="DeliverabilityCodeType" type="mailxml_base:deliverabilityCodeType" minOccurs="0"/>
LastName	String (50)	<xs:element name="LastName" type="mailxml_base:s50"/>
FirstNameMiddleName	String (15)	<xs:element name="FirstNameMiddleName" type="mailxml_base:s15"/>
prefix	String (15)	<xs:element name="prefix" type="mailxml_base:s15"/>
suffix	String (15)	<xs:element name="suffix" type="mailxml_base:s15"/>
KeylineFromEDoc	String (50)	<xs:element name="KeylineFromEDoc" type="xs:string"/>
OldAddressType	String (1)	<xs:element name="AddressType" type="mailxml_base:addressType"/>
OldUrbanizationName	String (100)	<xs:element name="UrbanizationName" type="xs:string"/>
OldPrimaryNumber	String (10)	<xs:element name="PrimaryNumber" type="mailxml_base:s10"/>
OldPreDirectional	String (2)	<xs:element name="PreDirectional" type="mailxml_base:s02"/>
OldStreetName	String (28)	<xs:element name="StreetName" type="mailxml_base:s28"/>
OldStreetSuffix	String (4)	<xs:element name="StreetSuffix" type="mailxml_base:s04"/>
OldPostDirectional	String (2)	<xs:element name="PostDirectional" type="mailxml_base:s02"/>
OldUnitDesignator	String (4)	<xs:element name="UnitDesignator" type="mailxml_base:s04"/>
OldSecondaryNumber	String (10)	<xs:element name="SecondaryNumber" type="mailxml_base:s10"/>
OldCity	String (28)	<xs:element name="City" type="mailxml_base:s28"/>
OldState	String (2)	<xs:element name="State" type="mailxml_base:s02"/>
OldZipCode	String (5)	<xs:element name="ZipCode" type="mailxml_base:ns05"/>
OldZipCodePlus4	String (4)	<xs:element name="ZipCodePlus4" type="mailxml_base:ns04" minOccurs="0"/>
NewAddressType	String (1)	<xs:element name="AddressType" type="mailxml_base:addressType"/>
NewUrbanizationName	String (100)	<xs:element name="UrbanizationName" type="xs:string"/>
NewPrimaryNumber	String (10)	<xs:element name="PrimaryNumber" type="mailxml_base:s10"/>
NewPreDirectional	String (2)	<xs:element name="PreDirectional" type="mailxml_base:s02"/>
NewStreetName	String (28)	<xs:element name="StreetName" type="mailxml_base:s28"/>
NewStreetSuffix	String (4)	<xs:element name="StreetSuffix" type="mailxml_base:s04"/>
NewPostDirectional	String (2)	<xs:element name="PostDirectional" type="mailxml_base:s02"/>
NewUnitDesignator	String (4)	<xs:element name="UnitDesignator" type="mailxml_base:s04"/>
NewSecondaryNumber	String (10)	<xs:element name="SecondaryNumber" type="mailxml_base:s10"/>
NewCity	String (28)	<xs:element name="City" type="mailxml_base:s28"/>
NewState	String (2)	<xs:element name="State" type="mailxml_base:s02"/>
NewZipCode	String (5)	<xs:element name="ZipCode" type="mailxml_base:ns05"/>
NewZipCodePlus4	String (4)	<xs:element name="ZipCodePlus4" type="mailxml_base:ns04" minOccurs="0"/>
PrivateMailBox	String (37)	<xs:element name="PrivateMailBox" type="mailxml_base:s37"/>

Report Column Name	Column Type and size	Mail.XMl Element Namer
ClassNotificationType	String (1)	<xs:element name="ClassNotificationType" type="mailxml_base:classNotificationType"/>
FeeNotification	String (3)	<xs:element name="FeeNotification" type="mailxml_base:yesNo"/>
BusinessName	String (50)	

The *PostalOne!* system will send one or more Full-Service Address Correction blocks.

The *PostalOne!* system will provide Move Type to identify the type of move for Individual, Family or Business (indicated by values ‘I’, ‘F’, or ‘B’ respectively).

The COAName element will be used to identify the following:

Individual/Family Move Type = Last Name, First Name, Prefix and Suffix

Business Move Type = Last Name will be utilize to provide business name information

The ClassNotificationType element will be used to identify the mail class of the mail piece that generated the ACS COA notification for the following values:

‘A’ = Package Services (Bound Printed Matter)

‘B’ = First-Class

‘C’ = Periodicals Initial

‘D’ = Standard Mail

‘F’ = Periodicals Follow-up

The DeliverabilityCodeType element will be used to identify the deliverability status of the mailpiece that generated the ACS COA notification for the following values:

<blank> = COA Match with new address

‘K’ = COA Match, no forwarding address

‘G’ = COA Match, PO Box Closed, no forwarding address

‘W’ = COA Match with a temporary COA

The AddressType element will be used to identify the type of address from which the customer is moving for the following values:

‘G’ = General Delivery

‘H’ = Highway Contract Route

‘P’ = Post Office Box

‘R’ = Rural Route

‘S’ = Street Address

The PostalOne! system will send one or more Full-Service Nixie Detail blocks.

The ActionCode element will be used to identify the action taken for the returned mail for the following values:

‘F’ = Forwarded

‘W’ = Wasted

‘R’ = Returned

‘U’ = Unable to determine action

The ClassNotificationType element will be used to identify the mail class of the mail piece that generated the ACS COA notification for the following values:

‘A’ = Package Services (Bound Printed Matter)

‘B’ = First-Class

‘C’ = Periodicals Initial

‘D’ = Standard Mail

‘F’ = Periodicals Follow-up

Reason mail element will be used to identify the reason for the returned mail for the following values:

‘A’ = Attempted, not known
‘B’ = Returned for better address
‘D’ = Outside delivery limits
‘E’ = In dispute
‘I’ = Insufficient Address
‘L’ = Illegible
‘M’ = No mail receptacle
‘N’ = No such number
‘P’ = Deceased
‘Q’ = Not deliverable as addressed/unable to forward
‘R’ = Refused
‘S’ = No such street
‘U’ = Unclaimed
‘V’ = Vacant
‘X’ = No such offic

5 Move Update Verification Results (*PostalOne!)*

To review the Verification Results the user must access the Manage Mailing Activity service. Once the user is approved for access, the user logs in to the Business Customer Gateway and selects “Manage Mailing Activity”. There are two ways to access verification results, one way is through the Dashboard, and the other is through the Mailing Reports link, then View Transactions. Refer to Figure 5-1 and 5-2 below.

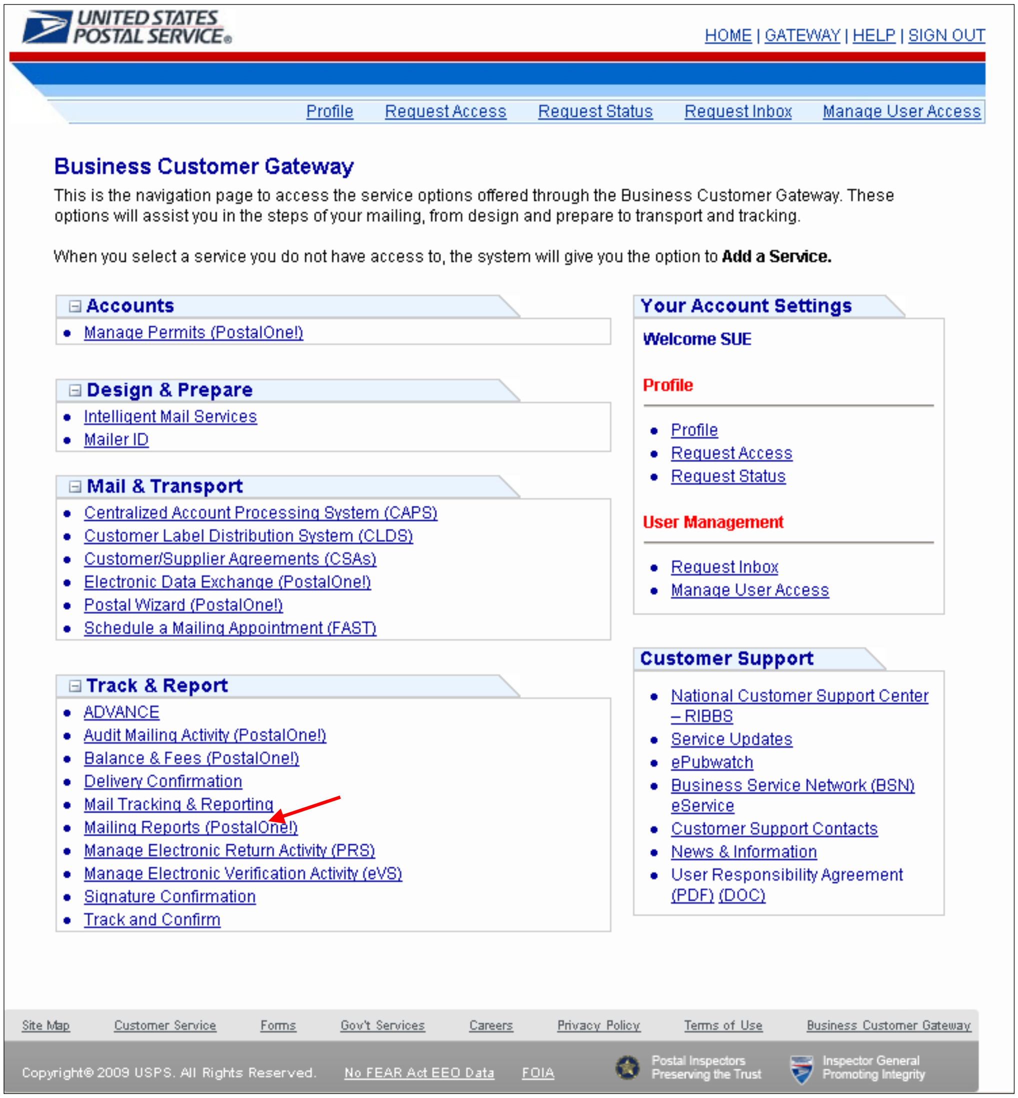


Figure 5-1: Business Customer Gateway user homepage

Move Update verification results are accessible through the Manage Mailing Activity service. The following screens below show how Mailers can review verification results generated during sampling of their mail. While continuous Mailers are defined as mailers who continuously produce mail (over a varying timeframe) and release it for transport at different intervals; verification is performed by sampling portions of the mail prior to completion of the entire mail job. All continuous and non-continuous mailers have access to these types of verification data via the Dashboard in the *PostalOne!* Mailer view.

The user selects *Dashboard* from the Manage Mailing Activity left-hand menu (Figure 5-2). The Dashboard Management System displays, where the user then selects *View Verification Results* link underneath the search page (Figure 5.3). If the link is not present, then no verification results are available.

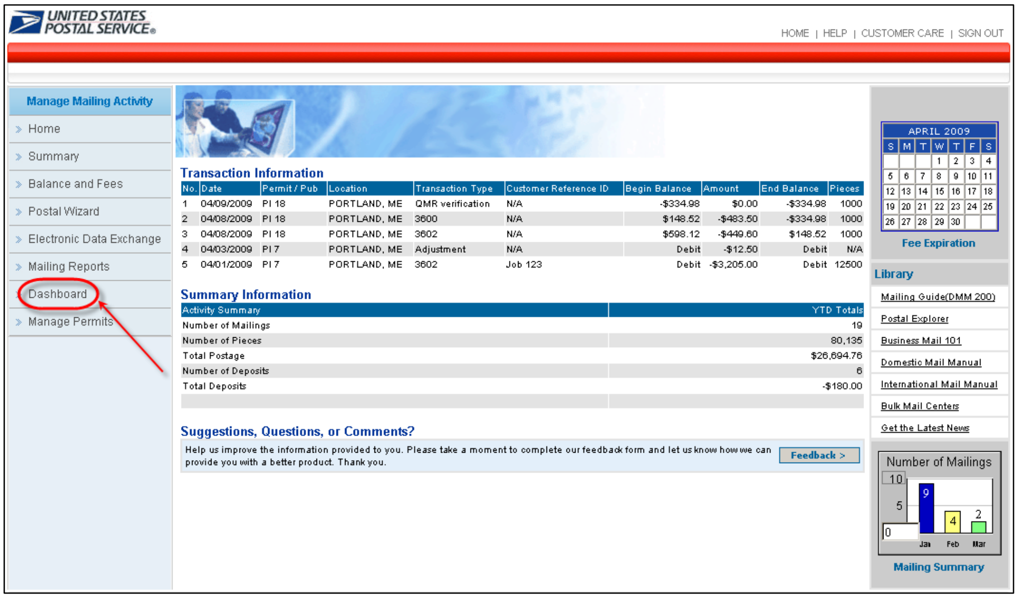


Figure 5-2: Manage Mailing Activity left-hand menu

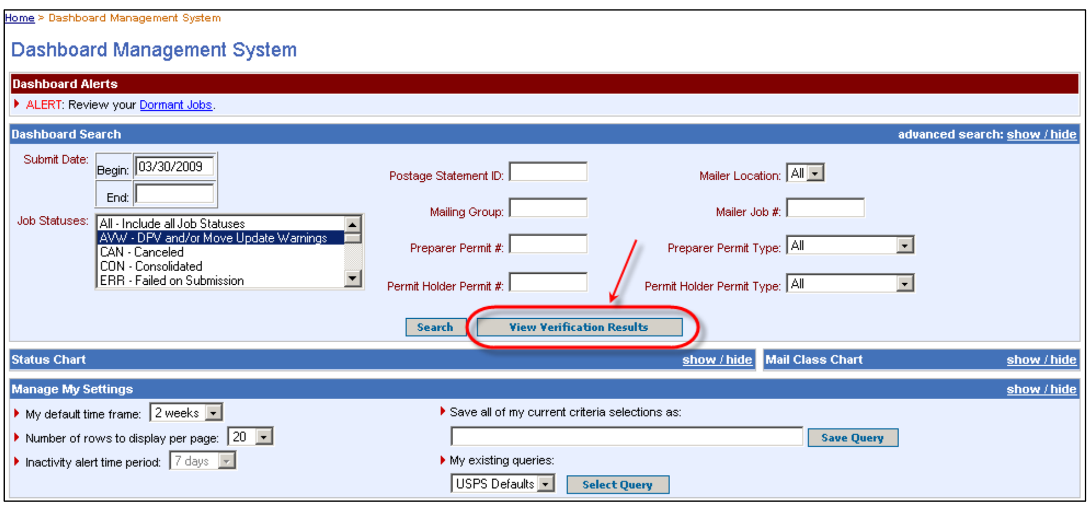


Figure 5-3: View Verification Results link

The View Verifications screen appears (Figure 5-4) after the user selects the *View Verification Results* link (Figure 5-3).

The user can click on any of the links in the "Verifications" column to access the underlying results (Figure 5-4). The following types of verifications are available:

- ME = MERLIN
- MU = Move Update
- PS = Presort
- BP = Bundle Preparation
- SP = Short paid (for First-Class Metered mailings)
- TT = Tap Test (for mailings with windowed envelopes)

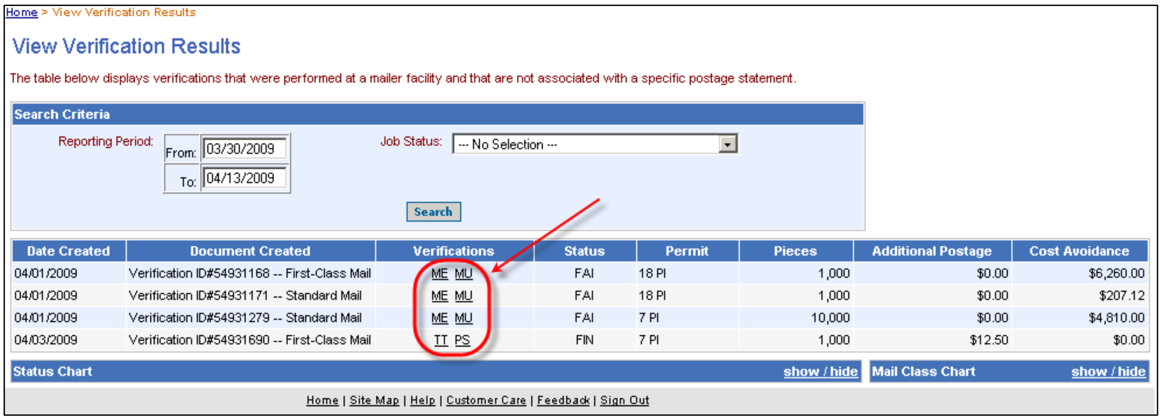
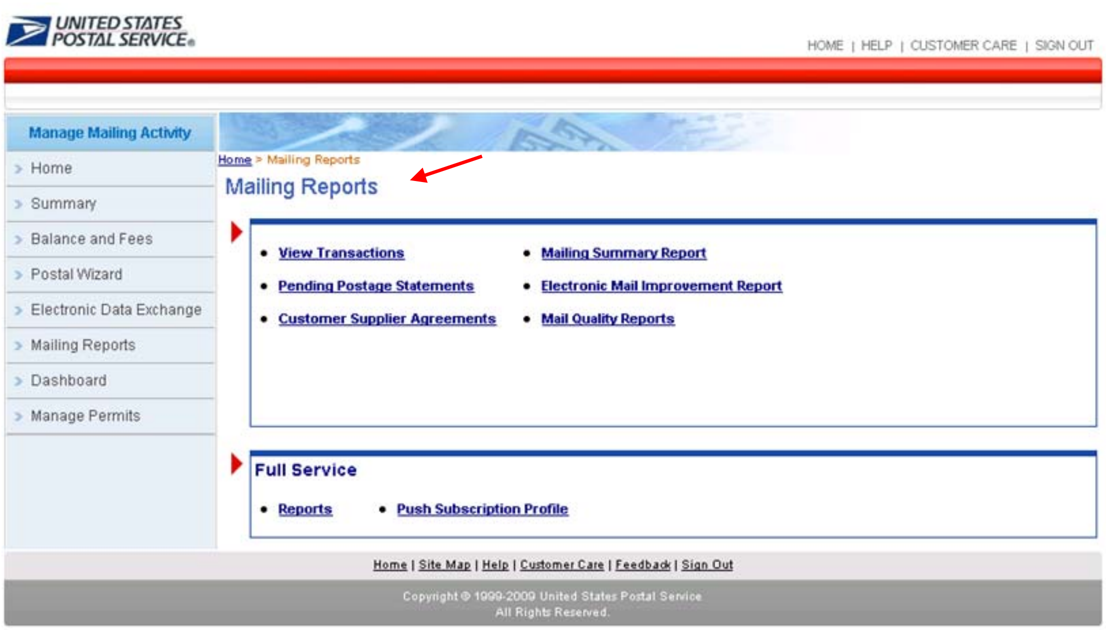


Figure 5-4: View Verification Results

Additionally, customers who have access to Manage Mailing Activity, have the same access to verification reports as the USPS acceptance clerks. The user selects *Mailing Reports* from the Manage Mailing Activity left-hand menu. The Mailing Reports menu displays, where the user then selects *View Transactions* link (Figure 5.5). If the user selects the *MU* link, the Move Update Address Validation report displays (Figure 5-



7).

Figure 5-5: User selects View Transactions to access Move Update verification results

When the user selects the View Transactions link the Transaction Summary page displays. The user can then select the MU link (Figure 5-6)

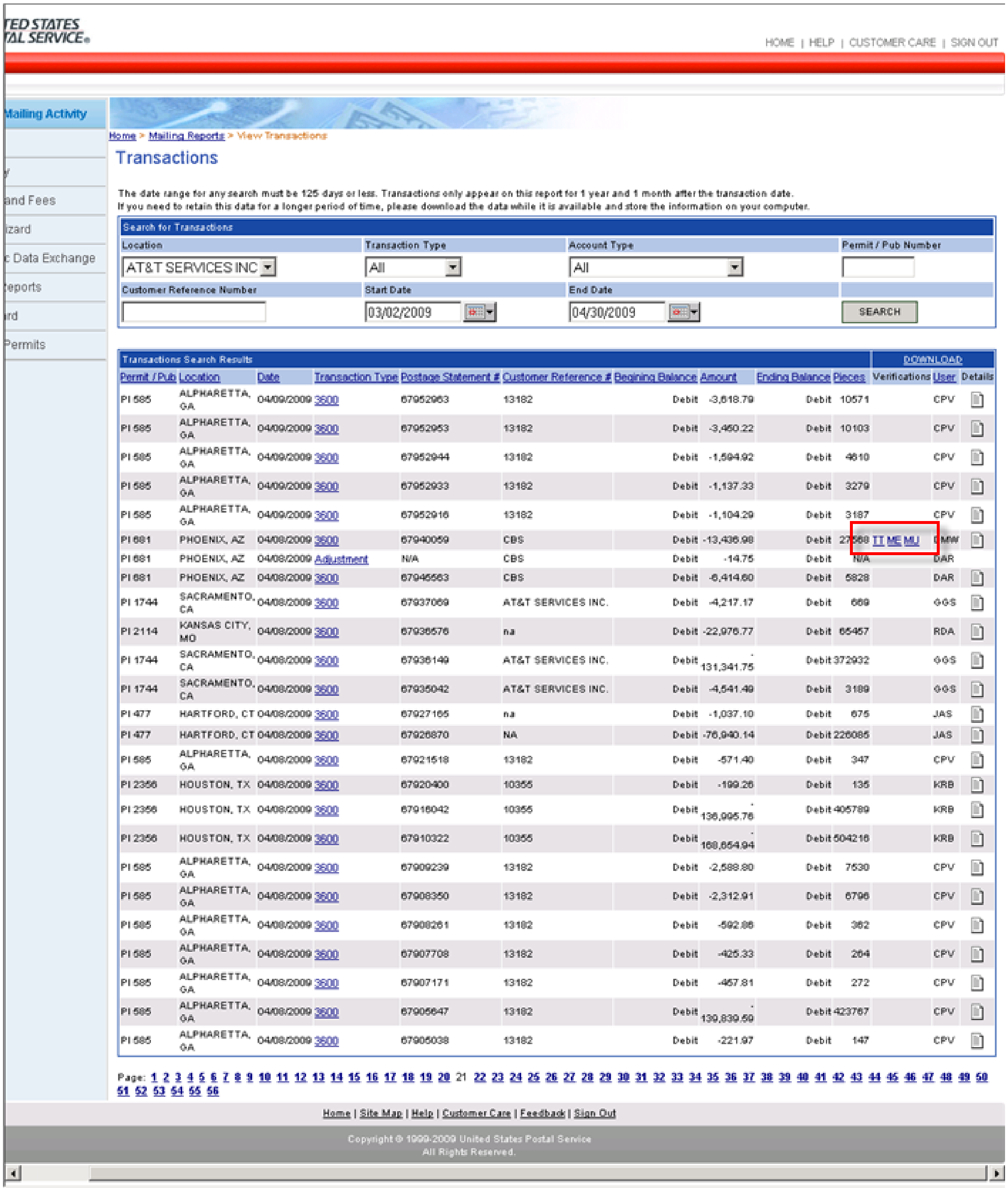


Figure 5.6: Transaction Summary page displays, the user can then select the MU link

When the user clicks the "MU" link, the Move Update Address Validation Report displays (Figure 5-8).

Mailing's Move Update Address Validation Report

Mailing Information

Permit Holder's Permit:	681	Mailer's Job ID:	CBS	Total Pieces:	27,568
Permit Holder's Name:	AT&T	Postage Statement ID:	67940059	Total Postage:	13436.98
Mailing Agent's Permit:	681	Mail Class:	First Class	Mailer MPTQM Certified:	
Mailing Agent's Name:	AT&T	Processing Category:	Letters	Move Update Method:	Ancillary Service Endorsement

MERLIN System Information

MERLIN Job ID:	4760308	Cost Center Name:	PHOENIX BMEU	MERLIN Verification Run:	
MERLIN Serial #:	MER-00-0864	MERLIN Verification Sample Size:	1,287	Start Date/Time:	04/08/09 04:49:00 PM
Cost Center Code:	0363640960	MERLIN Verification Mailpieces Processed:	0	End Date/Time:	04/08/09 05:21:04 PM

Move Update Address Validation Summary Information

Total # of mailpieces tested: 1250

Ranges	Total COA on File	Total COA updated by mailer	Total COA not updated by mailer	Total COA updated by mailer divided by Total COA on File
Less than 95 days	1	0	1	0.00 %
Between 95 days to 13 months	4	0	4	0.00 %
Between 95 days to 18 months	4	0	4	0.00 %
Between 95 days to 48 months	8	2	6	25.00 %

* COA = change of address

Move Update Error Identification

* Table displays mailpieces with Move Update address matches between 95 days and 48 months

MERLIN MPID	Name	Address Block	Barcode	Range	COA Date
837	SODEXHO INC	298 PO BOX QUANTICO VA 221340298	22134029898	Between 95 days to 13 months	10/15/08
435	UNPLUGGED CITIES	800 WASHINGTON AVE N STE 501 MINNEAPOLIS MN 554011184	55401118426	Between 95 days to 13 months	08/23/08
301	HAHN LOESER PARKS LLP	200 PUBLIC SQ STE SSOO CLEVELAND OH 441142316	44114231525	Between 95 days to 13 months	06/20/08
657	COMSAT	1600 TYSONS BLVD STE 550	22102480225	Between 95 days to 13	06/20/08

Figure 5-7: Move Update Address Validation report displays, after the user selects the MU link from the Transaction Summary page

Appendix C Test Scenario Criteria

Note: Refer to Appendix Intelligent Mail Full-Service and Basic Checklist on RIBBS for updated Test Criteria. The test criteria provided here are subject to change and are provided only to offer a sense of scope.

Test Scenario Criteria

To ensure proper and thorough testing, Mailers should replicate the types of mailings they anticipate sending to the *PostalOne!* production environment. Mailer should submit files for all mail classes, processing categories and price levels that apply:

- Classes (First-Class, Periodicals, Standard, Bound Printed Matter)
- Price categories (Enhanced Carrier Route, Automation (Full Service and/or Basic) Non-automation, Machinable, Nonmachinable, Irregular, Presorted, , etc)
- Processing categories (Cards, Letters, Flats, Machinable Parcels, Irregular Parcels)
- Customer Supplier Agreement information (for Mailers with agreements and submitting Full Service mailings)

Files should contain volumes typical of what would be mailed in production. Select the scenarios applicable to your mailing operation.

Test Criteria by Class:

First-Class Mail

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	**Required**	Optional
FC1A or FC1B	**X**		**X**	
FC2A or FC2B	**X**		**X**	
FC3	**X**		**X**	
FC4	**X**		**X**	
FC5			**X**	
FC6				X
FC7		X		X
FC8		X		X
FC9		X		X

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

Or

Scenario FC1B: Submit an 'original ready to pay' Mail.dat file (CSM Container status is 'R' for original ready-to-pay) that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario FC2A: 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 multiple (at least two) postage statements (CSM Container status is 'ready-to-pay') and the following documents:
    - o PS Form 3600 - Postage statement - First-Class and Priority Mail – Multiple postage statements (at least two; with different mailing dates)
    - o Reconciliation Report

Or

Scenario FC2B: Submit an 'original ready-to-pay' Mail.dat file (CSM Container status is 'R' for original ready-to-pay) that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail – Multiple postage statements (at least two; with different mailing dates)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario FC3: Submit a Mail.dat file that cancels a postage statement or cancel a postage statement through the *PostalOne!* Graphic User Interface.

Scenario FC4: Submit a Mail.dat file that changes the piece weight and creates a postage statement with the new piece weight.

Scenario FC5: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario FC6: Mixed Mailings – Mailings with Full-Service and Basic Service mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic Service can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario FC7: Mailings including Repositionable Notes. Submit a Mail.dat file that contains the information necessary to generate the following:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail – includes pieces at the repositionable notes price
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario FC8: First-Class Mail Co-mail. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement: PS Form 3600 - Postage Statement - First-Class and Priority Mail with multiple child statements
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario FC9: First-Class Mail Co-palletization. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report

Standard Mail

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	**Required**	Optional
S1A or S1B	**X**		**X**	
S2A or S2B	**X**		**X**	
S3	**X**		**X**	
S4	**X**		**X**	
S5			**X**	
S6				X
S7		X		X
S8		X		X
S9		X		X

<u>Scenario S1A</u>: 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 3602 - Postage Statement - Standard Mail (CSM Container status is 'R' for ready-to-pay)
    - o Register (applicable for plant-verified drop shipment mailings)
    - o Reconciliation Report

<u>Or</u>

<u>Scenario S1B:</u> Submit an 'original ready-to-pay' Mail.dat file (CSM Container status is 'R' for original ready-to-pay) that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

<u>Scenario S2A:</u> 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 multiple (at least two) postage statements (CSM Container status is 'ready-to-pay') and the following documents:
    - o PS Form 3602 - Postage statement - Standard Mail - Multiple postage statements (at least two; with different mailing dates)
    - o Register (applicable for plant-verified drop shipment mailings)

- Reconciliation Report

Or

Scenario S2B: Submit an 'original ready to pay' Mail.dat file (CSM Container status is 'R' for original ready-to-pay) that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement - Standard Mail – Multiple postage statements (at least two; with different mailing dates)
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario S3: Submit a Mail.dat file that cancels a postage statement or cancel a postage statement through the *PostalOne!* Graphic User Interface.

Scenario S4: Submit a Mail.dat file that changes the piece weight and creates a postage statement with the new piece weight.

Scenario S5: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario S6: Mixed Mailings – Mailings with Full-Service and Basic Service (Basic can include POSTNET pieces) mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level

- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario S7: Mailings including Repositionable Notes. Submit a Mail.dat file that contains the information necessary to generate the following:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail – includes the price for repositionable notes
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario S8: Standard Mail Co-mail. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement: PS Form 3602 - Postage Statement – Standard Mail with multiple child statements
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario S9: Standard Mail Co-palletization. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Bound Printed Matter

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	**Required**	Optional
B1A or B1B	**X**		**X**	
B2A or B2B	**X**		**X**	
B3	**X**		**X**	
B4	**X**		**X**	
B5			**X**	
B6				X
B7	**X**			X
B8	**X**			X

<u>Scenario B1A</u>: 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 3605 - Postage Statement – Package Services (CSM Container status is 'R' for ready-to-pay')
  - o Register (applicable for plant-verified drop shipment mailings)
  - o Reconciliation Report

<u>Or</u>

<u>Scenario B1B:</u> Submit an 'original ready-to-pay' Mail.dat file (CSM Container status is 'R' for original ready-to-pay) that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3605 - Postage Statement – Package Services
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

<u>Scenario B2A:</u> 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 multiple (at least two) postage statements (CSM Container status is 'ready-to-pay') and the following documents:

- PS Form 3605 - Postage statement – Package Services - Multiple postage statements (at least two with different mailing dates)
- Register (applicable for plant-verified drop shipment mailings)
- Reconciliation Report

Or

Scenario B2B: Submit an 'original ready to pay' Mail.dat file (CSM Container status is 'R' for original ready-to-pay) that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3605 - Postage Statement – Package Services – Multiple postage statements (at least two with different mailing dates)
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario B3: Submit a Mail.dat file that cancels a postage statement or cancel a postage statement through the *PostalOne!* Graphic User Interface.

Scenario B4: Submit a Mail.dat file that changes the piece weight and creates a postage statement with the new piece weight.

Scenario B5: Full Service. If there is a Customer Supplier Agreement, include applicable information in file. Include nonpresorted and/or nonbarcoded piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3605 - Postage Statement – Package Services
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario B6: Mixed Mailings – Mailings with Full-Service and Basic Service (Basic can include mailpieces with a POSTNET barcode) mailpieces in the automation portion. Include nonpresorted and/or nonbarcoded piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3605 - Postage Statement – Package Services
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report

- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario B7: Bound Printed Matter Co-mail. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement: PS Form 3605 - Postage Statement – Package Services with multiple child statements
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Scenario B8: Bound Printed Matter Co-palletization. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3605 - Postage Statement – Package Services
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report

Periodicals

Periodicals may include supplements, firm bundles, non-incidental and incidental enclosures, ride-alongs, repositionable notes, pending Periodicals, In-County and Outside County. It is important to test the items that your mailers use. However, these items once tested for one publication need not be tested for another publication.

Scenario P1: The Mailer must be able to submit an 'original' Mail.dat file that contains the necessary information to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Outside County Container and Bundle Report (will not be produced for In-County mail)
- ☐ Follow this with a 'ready to pay' scenario P2 listed below.

Scenario P2 Periodicals: The Mailer must be able to submit a 'ready to pay' Mail.dat file that contains the necessary information to generate the following documents:

- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)
- ☐ Scenario P4 Full-Service or mixed with Full-Service: If there is a Customer Supplier Agreement,

include applicable information in file. The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains an IMR (Intelligent Mail Range Record) file or PDR (Piece Detail Record) file and other necessary information to generate the following documents:

- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables.
- ☐ Ad Percentage Worksheet
- ☐ Edition Weight Worksheet
- ☐ Full Service Reports for Address Change Service and Start-the-Clock

Scenario P5 Basic Option or POSTNET: The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains the necessary information to generate the following documents:

- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)

- ☐ Scenario P6 Pending Periodicals with Standard Mail prices: The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains the necessary information to generate the following documents:
- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables. This postage statement will show the postage due while pending at the Standard Mail prices.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)
- ☐ Pending Periodicals cannot be CPP so cannot have a Payment Request

- ☐ Scenario P7 Periodicals with Incidental Enclosures: The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains the necessary information to generate the following documents:
- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables. This postage statement will show the postage due for the main book including the incidental enclosure.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)

- ☐ Scenario P8 Periodicals with Non-Incidental Enclosures: The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains the necessary information to generate the following documents:
- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables.
- ☐ Postage statements PS Form 3600 for First-Class Enclosures
- ☐ Postage statements PS Form 3602 for Standard Mail Enclosures
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)

- ☐ Scenario P9 Periodicals with Repositionable notes: The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains the necessary information to generate the following documents:
- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables. This postage statement will include the price for the repositionable notes.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)

- ☐ Scenario P10 Periodicals with firm bundles: The Mailer must be able to submit a ‘ready to pay’ Mail.dat file that contains the necessary information to generate the following documents:

- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables. This postage statement will include the price for the firm bundles.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)
- ☐ Scenario P11 Periodicals with supplementals: The Mailer must be able to submit a 'ready to pay' Mail.dat file that contains the necessary information to generate the following documents:
- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables. This postage statement will include the price for the supplementals.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)
- ☐ Scenario P12 Periodicals with ride-alongs: The Mailer must be able to submit a 'ready to pay' Mail.dat file that contains the necessary information to generate the following documents:
- ☐ Postage statement(s) PS Form 3541 separated by the postage statement generation variables. This postage statement will include the price for the ride-alongs.
- ☐ Ad Percentage Worksheet(s)
- ☐ Edition Weight Worksheet(s)
- ☐ Scenario P13 Periodicals Co-mail or Co-palletization: Periodicals co-mail or co-palletization may include pending Periodicals, Periodicals and include all the elements supplements, firm bundles, non-incidental and incidental enclosures, ride-alongs, repositionable notes, In-County and Outside County.
- ☐ The scenario generates
- ☐ Postage statements separated by the postage statement generation variables (including publication issue).
- ☐ Ad Percentage Worksheets for each publication issue
- ☐ Edition Weight Worksheets for each publication issue
- ☐

Testing Criteria for MLOCR (Two-Pass) - First-Class Mail

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	**Required**	Optional
MFC1	**X**		**X**	
MFC2	**X**		**X**	
MFC3	**X**		**X**	
MFC4			**X**	
MFC5				X

Scenario MFC1: For Multi-Line Optical Character Reader (MLOCR) letter and/or Flat mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report and Container Information
- ☐ Master Statement – PS Form 3600 - Postage Statement - First-Class and Priority Mail, with multiple child statements and multiple postage payment types (permit imprint, meter stamps and precanceled stamps)

- ☐ Customer Mail Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MFC2: For Multi-Line Optical Character Reader (MLOCR) mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3600 - Postage Statement - First-Class and Priority Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report

Scenario MFC3: The Mailer must be able to submit a Mail.dat file that provides the necessary information to create a Qualification Report and Master Postage Statement, and reports specified in Scenario M1. The Mailer must be able to Cancel a Postage Statement.

Scenario MFC4: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3600 - Postage Statement - First-Class and Priority Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Reconciliation Report
- ☐ Customer Mail Report
- ☐ Summary ZIP Destination Report
- ☐ Postage Statement Summary Report
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Scenario MFC5: Mixed Mailings – Mailings with Full-Service and Basic Service mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3600 - Postage Statement - First-Class and Priority Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Reconciliation Report
- ☐ Customer Mail Report
- ☐ Summary ZIP Destination Report
- ☐ Postage Statement Summary Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Testing Criteria for MLOCR (Two-Pass) – Standard Mail

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	**Required**	Optional
MSM1	**X**		**X**	
MSM2	**X**		**X**	
MSM3	**X**		**X**	
MSM4			**X**	
MSM5				X

Scenario MSM1: For Multi-Line Optical Character Reader (MLOCR) letter and/or Flat mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report and Container Information
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail, with multiple child statements and multiple postage payment types (permit imprint, meter stamps and precanceled stamps)
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MSM2: For Multi-Line Optical Character Reader (MLOCR) mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MSM3: The Mailer must be able to submit a Mail.dat file that provides the necessary information to create a Qualification Report and Master Postage Statement, and reports specified in Scenario M1. The Mailer must be able to Cancel a Postage Statement.

Scenario MSM4: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Reconciliation Report
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Summary ZIP Destination Report
- ☐ Postage Statement Summary Report
- ☐ Piece level information in an IMR (Intelligent Mail Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Scenario MSM5: Mixed Mailings – Mailings with Full-Service and Basic Service mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information

- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Reconciliation Report
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Summary ZIP Destination Report
- ☐ Postage Statement Summary Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Testing Criteria for MLOCR One-Pass - First-Class Mail

	eDocumentation / Basic		**Full-Service**	
Scenario	**Required**	Optional	**Required**	Optional
MOFC1	**X**		**X**	
MOFC2	**X**		**X**	
MOFC3	**X**		**X**	
MOFC4			**X**	
MOFC5				X

Scenario MOFC1: For Multi-Line Optical Character Reader (MLOCR) One-Pass mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report Plan including Container Information
- ☐ Update to Qualification Report to show the Actual piece counts
- ☐ Master Statement – PS Form 3600 - Postage Statement - First-Class and Priority Mail, with multiple child statements and multiple postage payment types (permit imprint, meter stamps and precanceled stamps)
- ☐ Customer Mail Report
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MOFC2: For Multi-Line Optical Character Reader (MLOCR) mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report including Container Information

- ☐ Update to Qualification Report to show the Actual piece counts
- ☐ Master Statement – PS Form 3600 - Postage Statement - First-Class and Priority Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - permit imprint (at least two child statements for different mail owners)
    - meter stamps
    - precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MOFC3: The Mailer must be able to submit a Mail.dat file that provides the necessary information to create a Qualification Report and Master Postage Statement, and reports specified in Scenario MOFC1 or Scenario MOFC2. The Mailer must be able to Cancel a Postage Statement.

- ☐

Scenario MOFC4: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3600 - Postage Statement – First-Class and Priority Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - permit imprint (at least two child statements for different mail owners)
    - meter stamps
    - precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Scenario MOFC5: Mixed Mailings – Mailings with Full-Service and Basic Service mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail,

- with multiple customers' mail in the mailing
- with multiple child statements
- multiple postage payment types
    - permit imprint (at least two child statements for different mail owners)
    - meter stamps
    - precanceled stamps (at least two child statements for different mail owners)

- ☐ Customer Mail Report
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Testing Criteria for MLOCR One-Pass - Standard Mail

	eDocumentation / Basic		**Full-Service**	
Scenario	**Required**	**Optional**	**Required**	Optional
MOSM1	**X**		**X**	
MOSM2	**X**		**X**	
MOSM3	**X**		**X**	
MOSM4			**X**	
MOSM5				X

Scenario MOSM1: For Multi-Line Optical Character Reader (MLOCR) One-Pass mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report Plan including Container Information
- ☐ Update to Qualification Report to show the Actual piece counts
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail, with multiple child statements and multiple postage payment types (permit imprint, meter stamps and precanceled stamps)
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MOSM2: For Multi-Line Optical Character Reader (MLOCR) mailings, the Mailer must be able to submit a Mail.dat file that contains the information necessary to create the following:

- ☐ Qualification Report including Container Information
- ☐ Update to Qualification Report to show the Actual piece counts
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐

Scenario MOSM3: The Mailer must be able to submit a Mail.dat file that provides the necessary information to create a Qualification Report and Master Postage Statement, and reports specified in Scenario MOFC1 or Scenario MOSM2. The Mailer must be able to Cancel a Postage Statement.

☐

Scenario MOSM4: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3602 - Postage Statement – Standard Mail,
  - o with multiple customers' mail in the mailing
  - o with multiple child statements
  - o multiple postage payment types
    - ▪ permit imprint (at least two child statements for different mail owners)
    - ▪ meter stamps
    - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐ Piece level information in an IMR (Intelligent Mail Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Scenario MOSM5: Mixed Mailings – Mailings with Full-Service and Basic Service mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. . If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement – PS Form 3602 - Postage Statement - Standard Mail,
    - o with multiple customers' mail in the mailing
    - o with multiple child statements
    - o multiple postage payment types
        - ▪ permit imprint (at least two child statements for different mail owners)
        - ▪ meter stamps
        - ▪ precanceled stamps (at least two child statements for different mail owners)
- ☐ Customer Mail Report
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Tray Difference Report
- ☐ Summary ZIP Destination Report
- ☐ Reconciliation Report
- ☐ Postage Statement Summary Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number
- ☐ Submit an update with handling unit and container data

Testing Criteria for Manifests - First-Class Mail

	eDocumentation/Basic		**Full-Service**	
Scenario	**Required**	Optional	**Required**	Optional
MMSFC1	**X**		**X**	
MMSFC2	**X**		**X**	
MMSFC3	**X**		**X**	
MMSFC4			**X**	
MMSFC5				X

Scenario MMSFC1: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full Service
- ☐ Piece level information in an IMR (Intelligent Mail Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level

- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario MMSFC2: Mixed Mailings – Mailings with Full-Service and Basic Service mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario MMSFC3: Submit a Mail.dat file that cancels a postage statement or cancel a postage statement through the *PostalOne!* Graphic User Interface.

Scenario MMSFC4: First-Class Mail Co-mail. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement: PS Form 3600 - Postage Statement - First-Class and Priority Mail with multiple child statements
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario MMSFC5: First-Class Mail Co-palletization. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3600 - Postage Statement - First-Class and Priority Mail
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET (Basic can include POSTNET pieces)
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information

- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Testing Criteria for Manifests - Standard Mail

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	**Required**	Optional
MMSSM1	**X**		**X**	
MMSSM2	**X**		**X**	
MMSSM3	**X**		**X**	
MMSSM4			**X**	
MMSSM5				X

Scenario MMSSM1: Full Service. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario MMSSM2: Mixed Mailings – Mailings with Full-Service and Basic Service (Basic can include POSTNET pieces) mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario MMSSM3: Submit a Mail.dat file that cancels a postage statement or cancel a postage statement through the *PostalOne!* Graphic User Interface.

Scenario MMSSM4: Standard Mail Co-mail. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ Master Statement: PS Form 3602 - Postage Statement – Standard Mail with multiple child statements
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Scenario MMSSM5: Standard Mail Co-palletization. Submit a Mail.dat file that contains the information necessary to generate the following documents:

- ☐ Qualification Report including Container Information
- ☐ PS Form 3602 - Postage Statement – Standard Mail
- ☐ Register (applicable for plant-verified drop shipment mailings)
- ☐ Version Summary Report
- ☐ Reconciliation Report
- ☐ Identify each piece as Full-Service, Basic or POSTNET
- ☐ Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- ☐ Nesting information at the piece level, tray level and container level
- ☐ By/For information
- ☐ Mail Owner and Preparer identified in the Mail.dat file using the MID, CRID or Permit Number

Mail.XML Testing Criteria

Testing Criteria for FAST

Currently, Mail.XML Fast Testing scenarios exist and every FAST Mail.XML customer has been required to get approved by the USPS prior to being approved in the USPS production environment. This approval used to take place in the CAT environment and starting in May 2009, this approval process has been moved to the TEM environment. FAST scenarios are tailored by the role of the customer, e.g., a software vendor is required to perform a lot more tests than a mailer. Some of those sample scenarios are:

Scenario F1: The Mailer must be able to create, update, and cancel one-time, recurring, and shell appointments for Drop-ship and Origin-Entry appointments.

Scenario F2: The Mailer must be able to associate more than one sibling container information to the parent container and be able to move container information from one appointment to another.

Scenario F3: The Mailer must be able to perform Joint Scheduling.

Scenario F4: The Mailer must be able to query the appointment, content information, and CSA.

Scenario F5: The Mailer must be able to create, update, and cancel stand alone content.

Testing Criteria for Full Service Feedback Pull Messages

The testing criteria for Pull Messages aspect of the Mail.XML is in planning phases. Approved and final process will be added later in this document.

Appendix D – Abbreviations and Acronyms

Abbreviation / Acronym	Definition
AMS	Address Management System
AVW	DPV and/or Move Update Warning
BCG	Business Customer Gateway
BME	Business Mail Entry
BME & PT	Business Mail Entry & Payment Technologies
BMEU	Business Mail Entry Unit
BMA	Business Mail Acceptance
BNS	Business Needs Statement
CAN	Canceled
CAT	Customer Acceptance Test
CAT	Critical Acceptance Time
COA	Change of Address
CON	Consolidated
CRID	Customer Registration ID
CSA	Customer/Supplier Agreement
DMU	Detached Mail Unit
eDOC	Standardized Electronic Documentation
ERR	Failed on Submission
FAI	Failed Verification
FIN	Finalized Statement
HTTP/HTTPS	Hyper Text Transfer Protocol/Hyper Text Transfer Protocol Secure
IMb	Intelligent Mail barcode
INC	Incomplete
ISM	Integrated Solutions Methodology
IT	Information Technology
Mail.dat, Mail.XML	Transmission Protocol of Mailers Files
MDA	Mailpiece Design Analyst
MEI	Mailer Enterprise Integration
NAP	Not Available for Processing
PAS	Passed Verification without Auto-Finalize
PAV	Pending DPV and Move Update Results
PAVE	Presort Accuracy Validation and Evaluation
PBV	Performance Based Verification
PC	Personal Computer
PEN	Pending Verification Results
QMR	Quality Mail Review

REV	Reversed
REW	Returned for Rework
SASP	Seamless Acceptance Service Performance
SQL	Sequel Database Transaction
SRS	Software Requirements Specification
STC	Start-the-Clock
URL	Uniform Resource Locator
UPD	USPS Processing Due
USPS	United States Postal Service
ZIP	Zone Improvement Program

Index