

Electronic Documentation Process

A Guide for Centralized Postage Payment (CPP) Customers

Version 2.9

September 30, 2011

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Change Log

Version 2.0 to 2.1

September 11, 2009

Section 2: Removed paragraph on page 7 regarding Co-mail or Co-palletization and inability to mix CPP payment postage at the PCSC with other publications in the same ready-to-pay container in the same Mail.dat job.

The proposed workaround to place this co-mail or co-palletization data into a separate Mail.dat job can not be effectively accomplished in the current eDoc file structure.

Version 2.1 to 2.2

October 15, 2009

Step 2 Verify Periodical Account Data (page 14): Inserted "The PCSC-assigned official Publication Title(s) as per the Official title of the publication from the PS Form 3500 Periodicals Application must be maintained for each original and additional entry office for the same permit."

Version 2.2 to 2.3

October 16, 2009

Updated Screen Flow 4, Creating a Consolidated Payment Request (page 38), to clarify that only the Publisher can make a payment request (not the Preparer or agent).

October 22, 2009

Added text to clarify transition options given the CPP program will end March 31, 2010 (page 7). Added section to describe how postage statements are generated for Mail.dat for CPP (page 10).

Version 2.3 to 2.4

October 29, 2009

Refined definition of 28-day rule (page 8).

November 3, 2009

Clarified that other Periodicals permits must also be linked to the local CAPS accounts (page 79).

Version 2.3 to 2.4

November 13, 2009

Recorded issue (50295) with Issue level postage statement register and version summary. Corrected location of link to version summary (page 56).

Version 2.3 to 2.5

November 18, 2009

Replaced Issue level postage statement register and version summary screens. (page 56). Added statement that only Mail.dat submissions display on the Register and the Version Summary reports. Removed known issue fixed in the November release.

Version 2.5 to 2.6

November 20, 2009

Clarified that the publisher is to notify the PCSC in NY at least two weeks before the earliest mailing date for which acceptance offices which will begin using eDoc and what issue will be last for CPP- traditional (must also include the mailing date page 80).

Upon receipt of email from TEM Team with Subject: PASSED - Official *PostalOne!*® CPP Enrollment of COMPANY X, HELP DESK copies email to pcsc@usps.gov. Attn: Chuck Tricamo (page 79)

Update to reference documents, *Test Environment for Mailers (TEM): Checklist and Troubleshooting* supersedes the IM Full-Service Checklist document (page 6).

Insert screen that demonstrates that after the payment request is paid in the CAPS system, each item in a payment request is assigned a unique *PostalOne!* System Transaction Number and a unique CAPS Transaction Number (page 51).

Version 2.6 to 2.7

December 2009 – March 2010

Clarified that Periodicals statements displayed on the dashboard reflect the total postage statement amount less the bundle and container postage under the 'Postage \$' column (page 30).

Updated 45-day Rule (page 9).

Added explanation for the Mail.dat .cpt Component Description and how the description is used in the Edition Weight Worksheet (page 36).

Added work-around regarding the Qualification Report. When performing a Container ID search it requires entering leading zeros in the Container ID field (page 73).

Removed note that the postage statement total amounts as displayed on dashboard did not match actual statements because of bundle and container postage. This issue as described is not currently being reported by users (page 30).

Minor revision to introduction to reflect software fixes and to be aligned with updates made to the Postal Service Mail.dat Technical Specification resulting from *PostalOne!* Release 24.0.

Version 2.7 to 2.8

March 2010 – May 2010

Added note that for CPP mailings with enclosures, both the periodical statement and the enclosure statement are set to FPP (Finalized Pending Payment) upon postage finalization by a postal employee. This is effective beginning in Release 25.0.0 for November 7, 2010 (page 9).

Version 2.8 to 2.9

May 2010 – September 2011

Updated the guide to reflect the recent Mail.dat versions supported. The support for Mail.dat 11-2 is currently in place and support for Mail.dat 12-1 will start on January 8, 2012.

Section 1: CPP and the Consolidated Payment

1.1 Welcome to Electronic Documentation

The USPS added the consolidated payment feature to *PostalOne!* to replace the Centralized Postage Payment (CPP) program, which ended on March 31, 2010. The CPP program reflects a hard copy postage payment option. The publisher does not pay any postage at the acceptance units but instead collects data from these units. The publisher is responsible for maintaining documentation applicable to the mailings and presenting the hard copy postage statements for the entire issue to the Pricing and Classification Service Center (PCSC) CPP unit in New York where the postage for the entire issue is paid at the 28-day CPP processing window and entered into the *PostalOne!* system.

The consolidated payment feature requires mailers to submit electronic documentation (eDoc), in doing so customers can consolidate multiple mail.dat jobs for a particular publication and issue at a single acceptance facility using a deferred payment option. This guide provides step-by-step instructions on the process for migrating from the CPP manual payment process to submitting eDoc and using the electronic payment feature via the local mail facility.

The eDoc migration for CPP mailers requires participation in TEM. In this environment, mailers are expected to pass the required test scenarios plus any optional scenarios that may be deemed necessary (refer to the test scenarios at the end of this document). In TEM, CPP publishers will get exposure and perform the payment options available under eDoc, which they will use in the production environment. Upon meeting test criteria, the CPP mailer then may engage in the production environment and enjoy the many benefits of eDoc.

CPP mailers currently engaged with the traditional (hard copy) CPP postage payment option, and who now wish to migrate to eDoc are the primary audience for this document. This document is also intended to provide guidelines for CPP mailers (Publishers) and testing support teams during the *PostalOne!* testing to be performed in TEM.

1.2 About This Guide

This guide for electronic documentation will move you through the steps to participate in ePayment/eDoc using Mail.dat. The first section of this guide is provided for informational purposes --the history of CPP and the consolidated payment system-- and can be bypassed if you prefer to go directly into the test requirements of the process. In addition to providing a step-by-step process to prepare you for the electronic documentation, the guide offers background information on the Centralized Postage Payment (CPP) program and addresses to common concerns of CPP mailers in the consolidated payment environment.

This guide is organized as follows: Section 1 describes various aspects of CPP, clarifying common concerns expressed by CPP mailers. Additionally, we include a recommended reading list and ample *PostalOne!* application screens to illustrate the process for the Consolidated Payment feature and to demonstrate the eDoc process flow. Section 2 describes the requirements and engagement for participating in the eDoc/ePayment, and provides a step-by-step process when in TEM and how the teams engage. Section 3 presents screen flows demonstrating transaction sequences and how to access reports, which support postage statement creation in *PostalOne!* Section 4 presents report descriptions and sample screens showing the data elements. Section 5 provides information on what final steps to take before moving to the production environment. Appendix A lists the test scenarios. Appendix B contains miscellaneous technical information and tips on Advertising Percentage (Ad%) and Edition Weight worksheets.

The guide also covers the following topics:

- Account data migration
- Business Account Set Up through the Business Customer Gateway
- Test Environment for Mailers (TEM)
- Dashboard management systems
- Payment options and transaction screen flow

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- The 28-Day rule
 - Supplement Mailings
 - Reports descriptions and usage
 - Mail.dat file format tips

1.1 Recommended Reading List

The following documents are highly recommended for reference material and are useful for technical guidance.

- Domestic Mail Manual section DMM 707 Periodicals: <http://pe.usps.com/text/dmm300/707.htm>.
- Postal Service Mail.dat Technical Specification provides detailed information on eDoc and Mail.dat development, and Appendix F of this specification recommended for understanding Periodicals mail class procedures. Guides are posted on the Rapid Information Bulletin Board System – RIBBS - <http://ribbs.usps.gov/index.cfm?page=intellmailguides>.
- Centralized Postage Payment (CPP) System for Periodicals Mail Publication 406 provides detailed information on how to apply for and mail under the Centralized Postage Payment (CPP) system for Periodicals mail. Go to at <http://www.usps.com/cpim/ftp/pubs/pub406.pdf>
- User Access to Electronic Mailing Information & Reports Guide. If you are an existing user, read the instructions in the User Access to Electronic Mailing Information and Reports Guide section called *Continuing Customers* and refer to the section titled *Navigating the Business Customer Gateway*. If you need to access Gateway services of which you are not already engaged. Guide is posted on the Rapid Information Bulletin Board System – RIBBS - <http://ribbs.usps.gov/index.cfm?page=intellmailguides>
- For mailers interested in Full-Service testing, refer to the *I Test Environment for Mailers (TEM): Checklist and Troubleshooting*: guidance for the test environment posted on RIBBS at http://ribbs.usps.gov/intelligentmail_gateway/documents/tech_guides/TEMCHECKLIST.pdf

1.2 CPP Periodical Accounts Overview

The CPP designation authorized from the PCSC CPP unit in New York. The CPP indicator field in the Account Management record can only be set-up by the origin office. The PCSC specialist throughout the Publication title lifecycle, also reviews mailing eligibility, updates publisher Periodicals information and directs publication permit linkages to the acceptance locations. The PCSC specialist is authorized to change the Publication record to indicate and remove the CPP in the *PostalOne!* Account Management module (Refer to Exhibit 1).

In the CPP program, publishers have a CAPS account linked to their publication's USPS Publication Number (or permit). The USPS Publication Number permits are linked to the New York PCSC finance number; the Post Office serving the publication's known office of Publication, and any additional entry Post Office location(s). As part of the migration, these records and permits in the *PostalOne!* system are required to be linked to the respective authorized users and acceptance units. Refer to the Publication Data Set-up linkages goals in the following sections.

Authorized users include Mailing Standards, the Pricing and Classification Service Center (PCSC), the Business Mail Entry Unit (BMEU), and the Publisher or its agents. Such users are allowed access to the *PostalOne!* information for postage statement processing and (USPS internal-only) auditing purposes.

UNITED STATES POSTAL SERVICE®

Restricted Information

BMEU

- Message Center
- Account Management
- Balance and Fees
- Customer Assistance
- Dashboard
- Manifest Mailing System
- Reports
- Transactions
- Select Acceptance Unit
- Unpaid Mail (Update)
- Unpaid Mail (Add Item)
- Nonprofit
- BMEU Reporting
- BMEU Reporting
- BMEU Admin
- Location Admin
- MERLIN Admin
- Add/Edit BMEU

Edit Periodical Account

Permit Type: Periodicals (PE)

Applicant Information	Contact Information	Permit Information:
Publication/News Agent: FORBES	Name: ES-CORRAD	Account Status: ACTIVE
Company Address: 60 5TH AVE 8TH FLOOR NEW YORK, NY 10011-0001	Phone Number: (212) 628-2341	Cancellation Date: N/A
Finance Number: 472652	Email: esccorrad@forbes.com	Cancellation Reason: N/A
Comments: N/A		

Required fields are indicated by an asterisk - *

Permit Information

USPS Pub No: 204260 Master Number: Not linked to a master account.
 Location: QUEBECOR WORLD DYERSBURG TN

Application Information

Please enter all dates in "MM/DD/YYYY" format.

Application Receipt Date: 07/22/2009 Effective/Denial Date: 09/25/1998
 Application Date: 09/22/1998 Cancellation Date:
 * Official Classification: Additional Entry * Original Entry ZIP Code: 10199 - 9998
 * Application Type: 3501 General Publication Privileges

Publication Information

* Publisher Name: FORBES INC * Publication County: New York
Publisher Name and Publication County are not required for News Agents. Publication County is not required for Additional Entry classification.

* Rate Code: 200 Regular ISSN No: 0007-0706
 * Frequency: Other (See Customer File)
 * Advertising: General Advertising
 * Consolidated Mailer: Yes No
 * CPP Mailer: Yes No

Continue **Go Back**

Account is linked to CAPS.
To edit Effective Date, please contact CAPS Service Center to delink.

Exhibit 1: Account Management / Permit Information / CPP Mailer Indicator (BMEU/DMU acceptance unit internal screen). The Original Entry Office sets this flag.

1.3 CPP Program Transition Options

The USPS will discontinue the Centralized Postage Payment (CPP) program on March 31, 2010. During the transition period mailers who are engaged in the CPP program and who may also be migrating to electronic documentation can pay for each mailing by any combination of the following options: 1) the consolidated ePayment feature, 2) immediate ePayment, 3) the Centralized Postage Payment (CPP) hardcopy system, 4) the Postal Wizard, and 5) through Mail.XML beginning in November 2009. Note that only option one supports a deferred payment. All other options involve an immediate debit and billable statement. Regardless of the selected option for entering the postage, it is expected that the postage statements are for the mail accepted at each acceptance office.

The consolidated payment and immediate payment options are described in the next section. The CPP program is documented in USPS Publication 406 and can be found at <http://www.usps.com/cpim/ftp/pubs/pub406.pdf>. The Postal Wizard postage payment option is described in the User Access to Electronic Mailing Information and Reports Guide, Volume 1, Chapter 3 and can be found on RIBBS at <http://ribbs.usps.gov/index.cfm?page=intellmailguides>. The Mail.XML eDoc option is described in the Postal Service Mail.XML Technical Specification for Postage Payment and Reporting (eDoc) at http://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/xmlspec/MailXMLTechnicalSpeceDoc.pdf

When the CPP program ends in March 2010; and mailers do not engage in any of the options just described, the only alternative is manual submission of hardcopy postage statements at each acceptance site. However this option will be limited in scope as the Postal Service is moving toward electronic processing of all postage statements in March 2010.

1.4 ePayment Options and How They Occur

Review the following sections on the ePayment options to further boost your understanding of the CPP eDoc and the payment process transactional flow. Else if you feel you are prepared to submit files, read the section on the eDoc Process and prepare for testing in the TEM.

1.4.1 ePayment Options

For each publication, the publisher may choose from one of two options:

(1) consolidated payment or option

(2) immediate payment.

For the **consolidated payment** the following applies:

- The publisher or preparer may change the advertising percentage up until the time of payment using the advertising percentage worksheet.
- The publisher or preparer must make a payment request to indicate the date of payment. If there is no payment request, the system bills the postage after 28 days after the first date of mailing for the publication issue at the acceptance office.
- The balance equivalent to the postage for the publication issue must be maintained in the CAPS account at all times.
- The USPS field unit will monitor this escrow balance.

For the **immediate payment** the following applies

- Advertising percentage is final and the payment occurs when the mail is accepted.
- There is a debit for each billable postage statement (see the Postal Service Mail.dat Technical Specification for details on what variables generate a billable statement).
- The balance required for the mailing must be available when the mail is accepted at the acceptance office

1.4.2 How CPP Payment Transactions Occur

The mailing date on a postage statement comes from the Mail.dat file container summary record (CSM) field the postage statement mailing date in the Mail.dat specifications. Note that when no mailing date is provided, the system will use the current system date for the mailing date on the estimated postage statements.

When a mailer sends a Mail.dat file for a CPP mailing, the Mail.dat file is coded with a container status, which depending on the code triggers subsequent system processing based on the postage statement status (refer to Table 1 below).

In order to be eligible for CPP payments, the permits used in the Mail.dat file must be 1) linked to a CAPS account, 2) have the CPP Mailer flag set to Yes on the permit record, and 3) have at most one Original Entry

office designated on the permit record. In addition, the Mail.dat file must be coded with the postage payment option in the MPA file set to C.

Container Status	Postage Statement Status	Container Status Triggers
blank	Blank	Qualification Report
P	EST	Estimated Postage Statement and Qualification Report
R	UPD	Verification of Mail (by BMEU/DMU or acceptance unit)

Table 1: Container Status

The following postage statement status changes occur within *PostalOne!* These statuses are not triggered by a change in the container status, but rather by a change made to the postage statement stage. Refer to Table 2.

Container Status	Postage Statement Status	<i>PostalOne!</i> System Condition or Stage
	FPP	Finalization of Postage Statement by BMEU/DMU or acceptance unit from UPD
	FIN	Payment of Postage Statement in FPP either on the date indicated in the consolidated payment request or 28 days from the earliest date of mailing

Table 2: Postage Statement Status

In the event when a postage statement is in EST status, it is assumed that the mailer anticipates sending subsequent update Mail.dat files for the main file for the same single publication issue (same Publication Number, Issue Date and/or Issue Number and Volume Number). The system updates the mailing date when a Mail.dat files is submitted for supplemental mailing updates while also looking up container status triggers. The Mail.dat main file update will generate UPD postage statement. Supplemental mailing Mail.dat files, when submitted, will generate separate UPD postage statements.

When the BMEU/DMU finalizes postage statements for either the main file or the supplemental mailings in UPD status, verification of the mail takes place and if the BME completes finalization of the statement, the postage statement status changes to Finalized Pending Payment (FPP). The postage statement is considered finalized but the payment has not transacted for the mailing.

For CPP mailings with enclosures, both the periodical statement and the enclosure statement are set to FPP (Finalized Pending Payment) upon finalization by a postal employee. These enclosures will be paid with the rest of the mailing at the scheduled payment date. Additionally, mailers can select enclosure statements when scheduling payment requests.

1.4.3 28-Day Rule

Statements go to FPP when the BMEU/DMU or acceptance unit finalizes a postage statement in UPD status. Only postage statements in FPP status may be added to a payment request. The publisher sets the payment date in the payment request and the *PostalOne!* system will not allow this date to be later than 28 days after the earliest mailing date found among the postage statement in the payment request. If a postage statement in FPP status is not added to a payment request, the payment will occur 28 days after the earliest mailing date in the postage statement.

1.4.4 Postage Statement Generation and Finalization

When a Mail.dat file for a Job ID containing several Periodicals and/ or pending Periodicals is submitted, the system assigns a combined mailing ID and generates a single verification statement for all the containers in the Job ID that are marked ready-to-pay. If it is necessary to reverse the postage statements, then all postage statements for the Job ID are reversed. It is not possible to reverse a subset of postage statements for a Job ID and leave other postage statements in place.

The verification statement appears as a single entry on the dashboard for the clerk to finalize. All the billable postage statements (for each publication ID, issue date, and other variables listed in the Postal Service Mail.dat Specification Section Key Fields) are linked to this verification statement. Each billable statement is linked to child statements for each edition, drop-ship entry and other variables listed in the Postal Service Mail.dat Specification Section Key Fields. The Postal Clerk makes any necessary updates to the USPS-verified weights on the edition weight worksheet(s) attached to each billable statement, then enters the verification statement and finalizes it.

Upon finalization, the billable statements' status is changed from UPD to FPP (for a CPP publication selecting consolidated payment) or from UPD to FIN for all others. The FIN status statement debits the account attached to the publication for the amount of postage. For the statement in FPP status, the publisher may make further adjustments to the advertising percentages on the advertising percentage worksheet attached to each billable statement thus changing the amount of postage accordingly. The publisher may add each billable statement in FPP status to the payment request for each acceptance office, publication ID and issue date, then establish the consolidated payment date. When the consolidated payment date (set within 28 days of the earliest mailing date among the postage statements in the payment request) is reached the statement in FPP status is changed to FIN status and the CAPS account that is linked to the USPS Publication Number is debited. If an FPP status postage statement is not added to a payment request, the CAPS account will be debited 28 days after the earliest mailing date on the postage statement.

1.4.4.1 CAPS Transactions

A statement in FPP stage does not display the transaction number or the CAPS transaction number. After postage statements are designated for payment in the payment consolidation request, they are submitted to CAPS at midnight Central time on the date of payment. The system changes the status from FPP to Final (FIN) on the date of payment. A statement in FIN stage displays the transaction number and the CAPS transaction number if applicable. The system generates a summary receipt for a paid consolidated payment request where access is allowed for the BMEU, Mailer, and Mail Preparer. Each acceptance office with postage statements is listed on the receipt. See also section of Reviewing Periodical Transactions screen flow.

1.4.5 45-Day Rule

There is a 45-day rule that goes into effect when the statement (Mail.dat) Submit Date plus 28 days is greater than the processing date plus 45 days. In this instance, the deferred payment date is set to the processing date plus 45 days and the maximum payment date allowed for a consolidated payment request will be limited to the processing date plus 45 days. The processing date is defined as the date BMEU/DMU or acceptance unit finalizes a statement and the Statement goes into FPP status. The 45 day rule is intended to ensure that mailing dates far in to the future do not cause FPP statements to linger more than 45 days past processing before going to FIN and creating the payment transaction.

Note: A file Submit Date of not more than 12 days prior to the mailing date is recommended. The Mailing Date and Submit Date should not span more than 30 days as a general rule.

1.4.6 Supplemental Mailings

For a supplemental mailing file as with the main file, the postage statement for a single publication issue at an acceptance unit in FPP status is available for consolidation on a Payment Request up to the earliest mailing date of the main file plus the allotted 28 days. The general rule is not to defer payment of the main file by

extending the 28 day period for the main file of the same issue using a supplemental mailing. Payment Requests for such a supplemental mailing file should be created in a separate Payment Request when the mailing date(s) of the supplemental mailings are beyond the allotted 28 days.

Mailing Supplemental Mailings Within the Mailing Dates of the Main File Scenarios

1. Publishers will continue to have the option of including supplemental mailings along with the main file mailings and tag them as "CPP", provided the mailing date of these mailing is within the mailing dates of the main file for the same issue.¹
2. Publishers have the option not to tag the file as *CPP* and can elect the immediate payment option for each of these mailings.

¹ *Use this option only if the non-main file mailings are mailed at same Post Office location as main file mailings.*

Mailing Supplemental Mailings Outside the Mailing Dates of the Main File Scenarios

1. Publishers will have the option of including supplemental mailings mailed later than the main file mailing dates, include along with the main file mailings and tag them as "CPP", provided the main file 28-day payment request day does not change i.e., the last day of mailing of the main file of the issue is August 1; therefore the "Payment Request" date would be August 15. If there are supplemental mailings made after August 1st and the publisher does not extend the Payment Request date from August 28 (sets back the payment date on supplemental mailings), then these supplemental mailings may be tagged as "CPP" and included in the consolidated payment for the main file of that issue.¹
2. Publishers have the option of tagging multiple supplemental mailings as "CPP" and including them in a separate consolidated payment request option as long as the mailing date of the first supplement mailing in this separate consolidated payment request and the mailing date of the last supplemental mailing included in this separate consolidated payment request does not exceed 28 days i.e., three supplemental mailings that mail on the dates of August 16, 23, and 30. Since the difference in the number of days between the first mailing date (August 16) and the last mailing date (August 30) is 14 days, these three supplemental mailings could be mailed as one consolidated payment request.
3. Publishers have the option not to tag the file as *CPP* and can elect the immediate payment option for each of these mailings.

Non-Supplemental Back Copy Mailings (Replacement, Complaint, or Single Back Issue Request Copies)

Scenarios/Options:

1. When the publisher mails single back copies prepared from a non-main file or non-supplemental mailing file, the publisher can include with any consolidated payment request option mentioned above as long as it does not extend the "Payment Request" date of the consolidated payment and if all copies are identified as current issue under DMM 707.17.4.7, *Copies of Previous Issues*.²
2. The Publisher can also use Postal Wizard to submit postage statements along with submitting electronic documentation for these back copy mailings and still qualify for the Intelligent Mail Full Service option.
 - The Postal Wizard does not have the Edition Weight worksheet, Ad % Worksheet or Consolidated Payment request features. The Postal Wizard bills mailers when the Postal Clerk finalizes statements. Any need for matching billing date(s) require coordination with the Postal Clerk who is finalizing statement to finalize a statement at a desired time.

-
3. The Publishers can submit hard copy postage statements for manual input by Post Office at the mailing office. They also submit either electronic documentation or hard copy documentation. The copies are not eligible for the Full-Service Option.

- ¹ *Use this option only if the non-main file mailings are mailed at same Post Office location as main file mailings.*

- ² *Use this option only if the non-main file mailings are mailed at same Post Office location as main file mailings or supplemental mailings.*

1.5 eDoc Process Steps

In the following sections, the recommended steps to participate in the eDoc Process are provided for both the external (Publishers and their agents) and internal (USPS) Help Desk and testing teams. The eDoc process is comprised of four primary steps:

- ① Set up a business account to access *PostalOne!* through the Gateway
- ② Verify Data
- ③ Complete TEM Process
- ④ Migrate to Production

- ☛ The eDoc Process is subordinate to and does not supersede the terms and conditions of the CPP system Periodicals Service Agreement for the Publication(s). You may wish to review the section 1, Publisher's Responsibilities of the CPP Service Agreement.

1.5.1 eDoc Testing: Roles and Responsibilities

The following actors in the eDoc process are established as follows:

- **Pricing and Classification Service Center (PCSC) in NY:** maintains Periodical Account record data and validates data elements with Publishers.
- **Mailer Publisher:** notifies the PCSC of any changes to mailings, coordinates their agents on eDoc mailing responsibilities, updates advertising percentage worksheet and makes payment request.
- **Mailer Printer:** works with the Publisher to determine the Mail.dat process.
- **Help Desk:** monitors test scenario submissions and links users to the correct locations.
- **TEM Team:** For Data Set Up: 1) validates Periodical Account records at each Origin and Additional Entry location, and 2) works with acceptance sites with updating Periodical Account records. For Testing: 1) validates test criteria, and 2) performs reports validations.
- **DMU/BMEU (acceptance unit) Field Personnel:** works with TEM Team to migrate data to *PostalOne!*, fills in weights and finalize postage in the production environment.

Section 2: eDoc Process

eDoc Process Overview

The eDoc Process begins with ensuring all publication, permit data is set up correctly in *PostalOne!* If you are not already a registered Business Customer Gateway user, you will need to get access to USPS online services including the Electronic Data Exchange and of course *PostalOne!*

While in the TEM, you will be monitored by the Help Desk and Test Team who will be active behind the scenes. When file failures arise and you have tried using the file validator to fix errors in your files, the Help Desk may step in to assist you as necessary such that you will be enabled to always move forward in the TEM. Finally, when you have successfully completed the required test scenarios you will be notified by the BMEU who will communicate any remaining items left to complete before your migration to production. The manager of business mail entry (MBME) will confirm your authorization to participate in the production environment. Begin the eDoc process by following the four steps below.

2.1 Step 1: Access the Business Customer Gateway (<http://gateway.usps.com>)

Actions Required				
PCSC	Publisher	Help Desk	TEM Team (CAT)	Acceptance Office (DMU)
	✓	✓		

- Publishers and their agents new to *PostalOne!* CPP must register as a business customer** to participate in eDoc. Proceed to Step 2 if you are an existing CPP (*PostalOne!*) Customer with access to Business Customer Gateway. Otherwise, register as a New User and set up a business account from the Business Customer Gateway, and request Manage Mailing Activity. You will then have access to the Electronic Data Exchange. From the Electronic Data Exchange link, access to the TEM is enabled.
 - ✓ Once you have access to the Business Customer Gateway, work with the Help Desk to link permit information to your account. Instructions on how to do this are described in the next section.
 - ✓ In order to participate in the TEM and be eligible for CPP payment requests, you must have a CAPS account whereby in the TEM and production environment permits are linked and used in the Mail.dat file. Go to the CAPS Service Center Web site for more information at <http://caps.usps.gov/capshome.asp>

2.2 Step 2: Verify Periodical Account Data

Actions Required				
PCSC	Publisher	Help Desk	TEM Team (CAT)	Acceptance Office (DMU)
✓	✓	✓	✓	

In order to be properly set up for eDoc/ePayment, and to effectively migrate CPP data records for each additional entry unit(s) in the *PostalOne!* system, the Publisher will complete the Data Set Up Request/ List of Publications worksheet, making an entry for each Title. The Publisher will then forward the worksheet to the PCSC (Exhibit 2, see Appendix C for worksheet samples).

The PCSC will provide Periodical Account screens for each Title (Publication Number) to the Publisher as listed in the List of Publications worksheet, where in turn the Publisher will verify that data are up-to-date and correct. The PCSC will then update the record(s) in *PostalOne!* system and link records to the appropriate user locations.

Printer Name / Name Location	Select the printer location from the List of Printers locations tab and populate the five columns: Printer Name, Location Name, Environment Type, City and State.
Printer Location (Post Office)	Postal Service facility location for the plant where the mail is accepted and paid
Finance Number	Finance number of location. Example, if Location is BMEU. Finance number is that of BMEU location
Permit Number	Original Entry Finance Number linked to Permit
Publication Name (Title)	Official title of the publication from the PS Form 3500 Periodicals Application
USPS Pub No.	Official USPS Publication Number assigned upon approval of the PS Form 3500 Periodicals Application
CAPS Account No.	The USPS Publication Number at the acceptance office will be linked to this CAPS Account No (fill in the CAPS Service Center form to make this request.)
CAPS Account debit or credit?	Indicate whether CAPS account is debit or credit.
Co-Mail?	Will this publication be mailed via co-mail at this acceptance unit? Yes or No
Co-Pal?	Will this publication be mailed via co-palletization at this acceptance unit? Yes or No
Consolidated Payment?	Will this publication use the consolidated payment (CPP option (1)) at this acceptance office? Yes or No
TEM Test?	Indicate with "Yes" if the publisher is interested in Full-Service TEM for this location.
Gateway Username	Provide your Business Customer Gateway username. This username will be used to link the user to the Periodical Permit records.
Edition Worksheet Update Method	Correct weights are updated via Mail.dat? Yes or No Otherwise, the postal clerk is allowed to update the edition weight worksheet.
TEM Test?	Indicate with "Yes" if the publisher is interested in Full-Service TEM for this location.

Exhibit 2: List of Publications Worksheet Instructions

PUBLISHER / PCSC

- The Publisher completes the CPP Data Set Up Request/ List of Publications worksheet** and forward to the New York PCSC (Exhibit 2).
- PCSC pulls screens for each Title (Publication Name).** Periodical Account screens are accessed from the Account Management module from the BMEU (*PostalOne!*) internal user privilege. The Periodical Account screens display customer, CPP, permit and account information which currently exist in *PostalOne!* (Refer to Exhibit 3 for Periodical Account Data Elements for the different locations, e.g. Origin Entry, Additional Entry and PCSC).

✓ PCSC forwards (Periodical Account) screens to Publisher for validation.

□ **The Publisher will annotate the Periodical Account screens for sections:** Applicant, Permit Periodical and Contact information as necessary and communicate these changes to the PCSC specialist.

✓ The Publisher will verify all fields --Required fields are 1-17; Notes that items 3, 5 and 13 tend to be different between the three (facility) locations. Refer to Exhibit 3 through 6.

✓ The PCSC-assigned official Publication Title(s) as per the Official title of the publication from the PS Form 3500 Periodicals Application must be maintained for each original and additional entry office for the same permit.

The publisher must file a PS Form 3510, *Application for Additional Entry, Reentry, or Special Rate Request for Periodicals Publication*, to add or change an additional entry (i.e., a Post Office serving the mailer's plant), to request reentry (changes to title, frequency, etc.).

All publication titles at all finance numbers for the same permit must match exactly in order to create an Issue Level Postage Statement.

Periodical Account Field	Original Entry	Additional Entry	PCSC
Applicant Information			
1. Publication News Agent (Title)	Title of Publication	Same as Original Entry	Same as Original Entry
2. Company Address (Street, City, State, ZIP Code)	Original Entry address and ZIP Code (known office of publication, location transacting the business of the publication)	Same as Original Entry	Same as Original Entry
3. Finance Number (USPS use)	Finance number of location (refer to Item #5) Example, if Location is BMEU. Finance number is that of BMEU location	Finance number of the Permit number Additional Entry location	PCSC NY CPP Finance number " 35-5821 "
Periodical Information			
4. USPS Pub No.	Publication No. assigned by USPS, a six digit number with leading zeros	Same as Original Entry	Same as Original Entry
5. Location	Post Office Facility serving the known office of publication.	USPS Facility Acceptance Unit serving the Additional Entry office	"RATES AND CLASSIFICATION CENTER"
6. Publisher Name	Name of Publishing Company	Same as Original Entry	Same as Original Entry
7. Rate Code	"200 Regular" unless Pub is Nonprofit, Classroom or Sci Ag	Same as Original Entry	Same as Original Entry
8. Frequency	Frequency of Issue (must be at least quarterly)	Same as Original Entry	Same as Original Entry
9. CPP Mailer (No indicates the mailer elects the <i>Immediate</i> payment option)	"Yes"	Same as Original Entry	Same as Original Entry
Contact Information			
10. Name	Publisher/Agent contact	Same as Original Entry	Same as Original Entry
11. Phone Number	Publisher/Agent contact phone	Same as Original Entry	Same as Original Entry
12. Email	Publisher/Agent contact email	Same as Original Entry	Same as Original Entry
13. Official Classification (Additional or Origin)	"Original Entry"	"Additional Entry"	"Additional Entry"
14. Application Type	Usually "General Publication", unless mailing privileges are with the publications of institutions and societies category	Same as Original Entry	Same as Original Entry
15. Original Entry ZIP Code (Same as Company Address #2)	ZIP Code of Post Office serving the known office of publication.	Same as Original Entry:	Same as Original Entry
16. Publication County (Original country entry)	County of USPS facility serving the known office of publication	Same as Original Entry	Same as Original Entry
17. 17.ISSN No	International Standard Serial Number (ISSN), a unique eight-digit number used to identify a print or electronic periodical publication	Same as Original Entry	Same as Original Entry

Exhibit 3: Periodical Account Data Fields per Location. Note that items 3, 5 and 13 tend to be different between the three locations

- ❑ **PCSC updates the field record(s) in *PostalOne!***
- ❑ **The PCSC sends corrected screens to the TEM Team** and validates Periodical record linkages 1-3 below.
 1. Permit record of a USPS Publication Number is linked to the Origin location (known office of Publication address) (Exhibit 4).
 2. In the case where a Publication is mailed from an Additional Entry office, the permit record of a USPS Publication Number is linked to an Additional Entry location (printer location where mail is deposited) (Exhibit 5).
 3. Permit record of a USPS Publication Number is linked to New York PCSC finance number (Exhibit 6).

UNITED STATES POSTAL SERVICE | Feedback | Personal Profile | Logout | Today's Date: 06/12/2009

BMEU | Confirm Periodical Account

Permit Type: Periodicals (PE)

Applicant Information

1 Publication/News Agent: ADVERTISING AGE
 2 Company Address: 360 N MICHIGAN AVE
 CHICAGO, IL 60601-3814
 3 Finance Number: 16-1542
 Comments: N/A

Contact Information

10 Name: JIM CANTLEY
 11 Phone Number: (313) 446-1615
 12 Email: jcantley@crair.com

Permit Information:
 Account Status: ACTIVE
 Cancellation Date: N/A
 Cancellation Reason: N/A

Periodical Information:

4 USPS Pub No: 8200
 5 Location: BMEU
 Application Date: 05/13/1988
 Effective/Denial Date:
 Cancellation Date:

13 Official Classification: Original Entry
 14 Application Type: General Publication Privileges
 Total Application Fee: \$540
 15 Original Entry ZIP Code: 60607-9998
 16 Publication County: COOK
 17 ISSN No: 0001-8899

6 Publisher Name: CRAIR COMMUNICATIONS, INC.
 7 Rate Code: 200 Regular
 8 Frequency: Other (See Customer File)
 Advertising: General Advertising
 Consolidated Mailer: Yes
 9 CPP Mailer: Yes

Save Periodical | Go Back

Exhibit 4: Original Entry Record (see exhibit 2 for field content)

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Restricted Information Today's Date: 06/15/2009

BMEU

Confirm Periodical Account

Permit Type: Periodicals (PE)

Applicant Information

1 Publication/News Agent: ADVERTISING AGE
 2 Company Address: 360 N. MICHIGAN AVENUE
 CHICAGO, IL 60601-3806
 3 Finance Number: 56-6490
 Comments: CPP

Contact Information

10 Name: JIM CANTLEY
 11 Phone Number: (313) 446-1615
 12 Email: jcantley@crain.com

Permit Information:
 Account Status: ACTIVE
 Cancellation Date: N/A
 Cancellation Reason: N/A

Periodical Information:

4 USPS Pub No: 8200
 5 Location: PEWAUKEE MAIN OFFICE
 Application Date: 02/19/2009
 Effective/Denial Date:
 Cancellation Date:

13 Official Classification: Additional Entry
 14 Application Type: General Publication Privileges
 Total Application Fee: \$85
 15 Original Entry ZIP Code: 60607-9998
 16 Publication County: COOK
 17 ISSN No: 0001-8899

6 Publisher Name: CRAIN COMMUNICATIONS INC
 7 Rate Code: 200 Regular
 8 Frequency: Other (See Customer File)
 Advertising: General Advertising
 Consolidated Mailer: Yes
 9 CPP Mailer: Yes

[Save Periodical](#) [Go Back](#)

Exhibit 5: Additional Entry Record (see exhibit 2 for field content)

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Restricted Information Today's Date: 06/15/2009

BMEU

Confirm Periodical Account

Permit Type: Periodicals (PE)

Applicant Information

1 Publication/News Agent: ADVERTISING AGE
 2 Company Address: 360 N. MICHIGAN AVENUE
 CHICAGO, IL 60601-3806
 3 Finance Number: 35-5821
 Comments: N/A

Contact Information

10 Name: JIM CANTLEY
 11 Phone Number: (313) 446-1615
 12 Email: jcantley@crain.com

Permit Information:
 Account Status: ACTIVE
 Cancellation Date: N/A
 Cancellation Reason: N/A

Periodical Information:

4 USPS Pub No: 8200
 5 Location: RATES & CLASSIFICATION CENTER
 Application Date: 12/04/1989
 Effective/Denial Date:
 Cancellation Date:

13 Official Classification: Additional Entry
 14 Application Type: General Publication Privileges
 Total Application Fee: \$85
 15 Original Entry ZIP Code: 60607-9998
 16 Publication County: Cook
 17 ISSN No: 0001-8899

6 Publisher Name: CRAIN COMMUNICATIONS INC.
 7 Rate Code: 200 Regular
 8 Frequency: Other (See Customer File)
 Advertising: General Advertising
 Consolidated Mailer: Yes
 9 CPP Mailer: Yes

[Save Periodical](#) [Go Back](#)

The Original Entry ZIP Code must be the same ZIP code in the Original Entry Office, Acceptance Site, and PCSC N.Y.

Exhibit 6: PCSC Record (see exhibit 2 for field content)

TEM Team / DMU/BMEU / HELP DESK

- The TEM team will enter Periodical Record data into *PostalOne!***. All fields of each section that are of particular importance (Items 1-17) are listed in Exhibit 3.
 - ✓ The TEM Team will update each field to validate and update the record in the TEM to simulate the PCSC records update in the Production environment. Note: All publication titles at all finance numbers for the same permit must be exactly the same.
 - ✓ The TEM Team will validate Periodical record linkages 1-3:
 1. Permit record of a USPS Publication Number is linked to New York PCSC finance number (Exhibit 4).
 2. Permit record of a USPS Publication Number is linked to the Origin location (known office of Publication address) (Exhibit 5).
 3. In the case where a Publication is mailed from an Additional Entry office, the permit record of a USPS Publication Number is linked to an Additional Entry location, Item 5 (Printer location where mail is deposited) Note: the Origin ZIP Code, Item 15 must be the same as in the Origin Entry Periodical Account record (Exhibit 6).
 - ✓ The TEM team will change the Publication record to indicate CPP in the *PostalOne!* Account Management module ONLY as necessary in the TEM to simulate any changes made in Production by the PSCS Specialist. (Refer to Exhibit 1)
 - When in *PostalOne!* Account Management > edit permit/periodical account > edit permit account > edit periodical account.

TEM Team & CAPS Accounts

The TEM Team uses the Periodical Account screens from PCSC, based on the List of Publications worksheet to simulate a Publisher's request for the CAPS Service Center to link the CAPS account to the publications in the production environment. Please read the disclaimer below.

Note: Setting up dummy CAPS accounts are the preferred method in the TEM. To set up a dummy account in the TEM, the Test Team links CAPS (production-environment) account numbers to permits in the TEM per the List of Publications worksheet. In doing so, CAPS (production-environment) account balances and activities are not comingled, nor do the TEM-linked dummy account transactions transcend into CAPS production-environment.

- TEM Team instructs IT (E. Dong - San Mateo) Support Team to link the USPS Publication Number at the acceptance office to the dummy CAPS account in the TEM.
- TEM Team follows the procedure below to set up a dummy CAPS account in the TEM.

The Refund process to create "pseudo money" funds in a TEM Account for testing is as follows

- Log in to the Internal TEM URL: <https://tem.uspspostalone.com/postal1/index.cfm?com=false> and follow the steps 1-4 below.

Caution: Make sure the header says "You are in the Test Environment for Mailers (TEM)".

1. BMEU internal user logs on to *PostalOne!* and selects Transactions from the Bluebar Menu. Screen 1 will appear.
2. Click on "Transactions" from Bluebar Menu (screen 1).
3. Select the "Refund Trust" radio button then select the **Submit** button (screen 2).
4. Enter the dollar amount in the 'Amount of Refund'. 'Reason Code is always "Other" and the 'Comments' should be "Test Account", then select the **Submit** button (screen 3). The confirmation screen should display.

-
5. Review Confirmation screen. The screen shows you are in the TEM environment and the total Current Balance the account now shows. Monies in accounts are pseudo money and no accountability is being charged to any live accounts.

HELP DESK

- Enable CPP Finance number for Acceptance Office user access (to simulate PCSC updating the mailer permit to CPP mailer in Production environment).
- Link all USPS Publication Numbers (both Origin Entry and all Additional Entry) to the correct customer CRID (location) in the TEM and Production environments.

HELP DESK / TEM Team / PUBLISHER

- TEM team notifies Help Desk when all three items have been linked and set-up:
 - o CAPS Account links to permits have been completed as per Data Set Up Request worksheet.
 - o Update Periodical Record data and linkages to the locations in *PostalOne!* TEM.
 - o Work with all Acceptance Unit clerks including the Original offices for data entry of all Periodical Record data in *PostalOne!* production environment.
 - All publication titles at all finance numbers for the same permit must be exactly the same for each original and additional entry office for the same permit.
- Help Desk makes any corrections to CRID locations, and/or MID associations to CRID per Mailer ID worksheet from the Publisher.
- Help Desk notifies Publisher:
 - o To proceed with the TEM process and copies TEM team.
 - o Upon notification from the TEM Team that all three items have been linked and set-up:
 - Dummy CAPS Account links in the TEM.
 - Periodical Record corrections, updates and linkages to the locations in *PostalOne!* TEM
 - Periodical Record corrections, updates and linkages in *PostalOne!* production environment
 - Mailer IDs and CRIDs as necessary

2.3 Step 3: Complete the TEM Process

Actions Required				
PCSC	Publisher	Help Desk	TEM Team (CAT)	Acceptance Office (DMU)
	✓	✓	✓	

PUBLISHER

Publisher logs on to the Business Customer Gateway to begin testing in the TEM

- Log on to the Business Customer Gateway**

- Under the Mail and Transport section from your gateway homepage select Electronic Data Exchange
- When in the Electronic Data Exchange, go to the Test Environment for Mailers section at the bottom of the screen, under the Mail.dat specification you are using, select “Go to TEM” screen Figure 3-1.

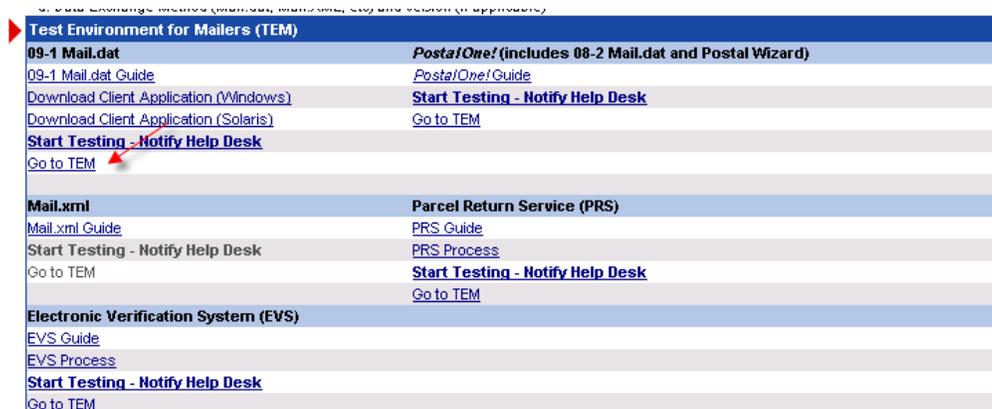


Figure 3-1: Entering the Test Environment for Mailers (TEM)

□ Access the TEM

- Use the client software for Mail.dat to upload files to TEM and practice with the test scenarios. Refer to the Test Criteria at the end of this document (use test scenarios which closely resemble your mailing operation and production plans)

Refer to the Postal Service Mail.dat Technical Specification, Chapter 3 for detailed information on the software

The technical specification is posted on the Rapid Information Bulletin Board System – RIBBS <http://ribbs.usps.gov/index.cfm?page=intellmailguides>

- Send the Help Desk an email notification of each test scenario number you wish to practice or validate (use email link on Data Exchange Page per or email postalone@usps.gov).
 - Email the following to the Help Desk: **Email Subject Line: CPP PRACTICE – Company Name - City**; and in the body of the email, include: Company Name, Full Address, Contact Name, Phone Number, and Data Exchange Method (Mail.dat with Mail.dat Version Number information e.g., Mail.dat 12-1).
 - Email the following to the Help Desk: **Email Subject Line: CPP SCENARIO X - Company Name - City**; and in the body of the email, include: Company Name, Full Address, Contact Name, Phone Number, and Data Exchange Method (Mail.dat with Mail.dat Version Number information e.g., Mail.dat 12-1).

□ Proceed with the preliminary actions

- ✓ Ensure the Mail.dat MPA file for the USPS Publication Number record has Postage Payment Option set to the value C for CPP (CPP will be displayed on the dashboard and in the postage statement).
- ✓ Practice submitting files according to the scenario number. (Help Desk will work with you to resolve any issues).

-
- ✓ After sending the Mail.dat file in ready-to-pay status, review the postage statements in UPD status. If these statements are accurate, notify the Help Desk when you are ready to begin submitting files for validation in the TEM.

Execute each required test scenario until complete.

- Refer to the test criteria section at the end of this document.
- Refer to the screen flows to guide you (Section 3 for Screen Flows).
 - Accessing the Dashboard (Screen Flow 1)
 - Updating the Advertising Percentage (Screen Flow 2)
 - Accessing the Edition Weight Worksheet (Screen Flow 3)
 - Creating Consolidated Statements (Screen Flow 4)
 - Accessing the Postage Statement Register (Screen Flow 5)
 - Accessing the Issue Level Postage Statement (Screen Flow 6)

HELP DESK

Help Desk receives initial practice email notification from Publisher:

Access business location profile in the *PostalOne!* system and ensure correct profile set-up.

- Enters the customer information in the Implementation Performance spreadsheet on Blueshare (in alphabetical order).
 1. Customer Name
 2. City
 3. State
 4. Version
 5. Level of Service
 6. Finance Number (from PO of Mailing)
 7. Date Received
 8. Date Contacted (Acknowledgement email with Test Scenario worksheet)
- Determine the minimum number of required test scenarios by the designation of eDoc in the practice email notification.
- Send Acknowledgement email with Test Scenario worksheet to customer
- Forward Enrollment Acknowledgement of new eDoc customers with Test Scenario worksheet to the FEDAT Team to MBME to ensure training and equipment compliance.
- Post Implementation Performance data on the Blueshare Intelligent Mail site (USPS Intranet)

2.3.1 Creating Scripts for Test Criteria Scenarios

The required scenarios for eDoc include Scenario 1 and Scenario 2 (refer to the Test Criteria section at the end of this document). Validating scenarios require creating a sequence of scripts, where in some instances high level regression testing is performed by the TEM Team. Exhibit 7 below illustrates one possible sequence of scripts for Scenarios 1 & 2. For all optional scenarios e.g., Periodicals with Incidental Enclosures, Periodicals with Incidental Supplemental Mailings, similar sequence of scripts will need to be created to affect those scenarios.

Test Scenarios and Scripts

	Action 1	Action 2	Action 3	Action 4	Action 5	Reports to inspect: Mail Verification (TEM Team to simulate)
Scenario 1 Script 1	Publisher/Printer submits Mail.dat file	TEM Team verifies the Qualification Report and Container Information	End Script			<ul style="list-style-type: none"> o Qualification Report o Container Report o Bundle Report o Reconciliation o Version Summary
Scenario 2 Script 1 (<28 days)	Publisher/Printer submits Mail.dat file and makes no changes to Advertising % and Edition Weight worksheets	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	Publisher makes Payment Request.	End Script		<ul style="list-style-type: none"> o Reports in Scenario 1 o Postage Statement o Ad % o Edition Weight o Qualification Report o Version Summary o Reconciliation Report
Scenario 2 Script 2 (<28 days)	Publisher/Printer submits Mail.dat file and later updates the Advertising % worksheets	TEM Team finalizes postage statement in Finalized Pending Payment (FPP) Status	Publisher updates the advertising percentage worksheet while statement is in FPP status	Publisher makes Payment Request.	End Script	<ul style="list-style-type: none"> o Reports in Scenario 1 Script 1
Scenario 2 Script 3 (<28 days)	Publisher/Printer submits Mail.dat file and later updates the Advertising % worksheets	Publisher updates the advertising percentage worksheet while statement is in UPD status	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	Publisher makes Payment Request	End Script	<ul style="list-style-type: none"> o Reports in Scenario 1 Script 1
Scenario 2 Script 4 (<28 days)	Publisher/Printer submits Mail.dat file, TEM Team updates Edition Weight worksheet.	TEM Team updates edition weight worksheet and finalizes the postage statement (FPP) status	Publisher updates the Advertising % worksheet while postage statement is in FPP status	Publisher makes Payment Request	End Script	<ul style="list-style-type: none"> o Reports in Scenario 1 Script 1
Scenario 2 Script 5 (<28 days)	Publisher/Printer submits Mail.dat file, TEM Team updates Ed. Weight, Publisher updates Ad %	TEM Team verifies and enters corrected edition weight worksheet	Publisher updates the Advertising % worksheet while postage statement is in UPD status	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	Publisher makes Payment Request. End Script	<ul style="list-style-type: none"> o Reports in Scenario 1 Script 1
Scenario 2 Script 6 (<28 days)	Publisher/Printer submits Mail.dat file, TEM Team updates Ed. Weight, Publisher updates Ad % with Mail.dat file	TEM Team verifies and enters corrected edition weight worksheet	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	Publisher makes Payment Request	End Script	<ul style="list-style-type: none"> o Reports in Scenario 1 Script 1
Scenario 2 Script 7 (<28 days)	Publisher/Printer submits Mail.dat file in Ready-to-Pay status where CPT file (Ad%) is "F" for final	TEM Team verifies and enters corrected edition weight worksheet	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	Publisher makes Payment Request	End Script	<ul style="list-style-type: none"> o Reports in Scenario 1 Script 1

	Action 1	Action 2	Action 3	Action 4	Action 5	Reports to inspect: Mail Verification (TEM Team to simulate)
Scenario 2 Script 8 (<28 days)	Publisher/Printer submits Mail.dat file in Ready-to-Pay status where CPT file (Ad%) is "P" for Pending, and finalizes Ad% in Worksheet	TEM Team verifies and enters corrected edition weight worksheet	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	Publisher finalizes the Advertising % worksheet while postage statement is in UPD status.	End Script	o Reports in Scenario 1 Script 1
Scenario 2 Script 9 (<28 days)	Publisher/Printer submits Mail.dat file and modifies Mail.dat jobs into one payment for single acceptance office for single Pub title and issue	TEM Team verifies and enters corrected edition weight worksheet	TEM Team finalizes postage statement in UPD status, sending it to Finalized Pending Payment (FPP) Status	For statements available for the consolidated payment request, mailer selects the Mail.dat jobs for payment using the payment consolidation request	Publisher makes Payment Request. End Script	o Reports in Scenario 1 Script 1
Scenario 2 Script 10 (<28 days)	Preparer submits Mail.dat file preliminary job (Note populating mailing date is optional)	Publisher reviews postage statement in EST status on the Dashboard is	Preparer sends Mail.dat ready-to-pay job	TEM Team verifies and enters corrected edition weight worksheet	Go to Scenario 2, Script 6, Action 3	o Reports in Scenario 1 Script 1o Container Report o Bundle Report
Scenario 2 Script 11 (>28 days)	Publisher/Printer submits Mail.dat file. Allow the system to automatically perform the payment request after 28 days	Repeat of scripts 1 – 7. But Publisher performs corresponding actions for each script but does not make a Payment Request within 28 days	TEM Team performs corresponding actions for each script	TEM Team verifies Postage Statement and validates payment was made.	End Script	o Reports in Scenario 1 o Postage Statement o Ad% o Edition Weight o CPP Payment Request

Exhibit 7: Scenarios Matrix: Scenarios 1-3

HELP DESK / TEM Team

HELP DESK

- Resolves any file issues with customers
- Send Notification email of FAILED Scenarios to customer as communicated by the TEM Team
- Record scenario completion success in the Implementation Performance spreadsheet on Blueshare
 - Do not update the Implementation Performance Excel spreadsheet posted Blueshare Intelligent Mail site from 10:00am-12:00pm CT
- When a class of mail successfully completes file submission, the Date NCSC TEM Complete column is completed.
- Update a weekly VP TEM report on the Blueshare Intelligent Mail site. The report will include the following:
 - eDoc TEM progress (% complete, using minimum required test scenario as denominator).
 - Information for report will be updated as of COB (5:00PM CT) Fridays. Report will be available the following Monday no later than noon (CT).

-
- Email notification including Test Scenario worksheet is sent to HQ TEM (CAT) Team.
 - CC TEM Team, use PO_CAT@USPS.com email address.
 - Customer is officially passed to HQ TEM (CAT) team for final approval.

The TEM team/ HELP DESK

- Upon receiving Enrollment Acknowledgement email with Test Scenario from Help Desk begin tracking on Implementation Performance Excel spreadsheet posted Blueshare Intelligent Mail site.
 - The TEM Team will review the Implementation Performance spreadsheet posted on the Blueshare Intelligent Mail site daily and begin validating file submissions for Job ID/Test Scenario(s) that have been marked as complete by the Help Desk. There will be a daily call among the TEM Team.
 - Match the Test Scenario Criteria from to the job listed in the spreadsheet posted on the Blueshare Intelligent Mail site. TEM Team verifies the documentation includes the following:
 - Qualification Report (Can have multiples but must meet minimum volume and weight restrictions for the class of mail).
 - Check Processing Category in header for the scenario.
 - Verify Rate Level Detail Information at bottom shows:
 - Identifies pieces as eDoc per scenario.
 - Verify the piece count in the Qualification report(s) is not less than the total of postage statement(s).
 - Postage Statement
 - Postage Statement is in UPD status
 - Register for Periodical (applicable for plant-verified dropshipment mailings)
 - Verify the piece count of the postage statement equals or is less than the Qualification report (piece count does not have to match Qualification Report).
 - Version Summary Report
 - Verify the Version Summary Report piece count matches the Qualification report (s) associated.
 - Complete testing
 - Finalize postage statement
 - Verify that postage statement is in FIN status after finalization.
 - List transaction numbers of finalized postage statement to review later if needed.
- _____
- _____
- Reconciliation Report
 - Verify the Reconciliation Report Summary Pieces Accounted For match Postage Statements finalized.
 - Inspect CAPS Transactions Receipts upon Postage Statement FIN state
 - The TEM Team will log in as a BMEU clerk and access the Mailing Summary Report.

- Inspect CAPS Transaction Receipt. Note: The CAPS Transaction History report links to the receipt with the transaction number on it. The breadcrumb is: Reports > Transaction History Reports > CAPS Transaction History > Mailing Summary > Receipt. Refer to Exhibit 8: Mailing Summary Report. Refer to Exhibit 8.
 - The BMEU clerk (TEM Team simulates) validates the Postage Statement amount was correctly transacted by verifying the CAPS transaction (clerk selects the transaction number hyperlink, the system then returns the Receipt screen). Refer to Exhibit 9.
- The TEM Team lead or designee will update the implementation Performance spreadsheet posted on the Blueshare Intelligent Mail site only between **10:00am-12:00pm CT**
 - The TEM Team lead or designee will record in the "Job # COMP Scenario X " column the date scenario is validated.
 - For any issues, the TEM Team will create a PVCS Tracker issue and will designate Internal-CPP or Internal-TEM in PVCS Tracker.

You are in the Test Environment for Mailers (TEM)

Restricted Information

Reports > Transaction History Reports > CAPS Transaction History > Mailings Summary

Today's Date: 07/08/2009

[Download](#) [Printable View](#)

Mailings Summary Report

Transaction Number	Transaction Date	Activity Date	Permit NO	Permit Type	Amount	Description	Clerk
20091810000888M1	06/10/2009	06/30/2009	8200	PE	-10,758.76	3541 Periodical postage statement	REW
20091820000294M1	06/10/2009	07/01/2009	8200	PE	-10,934.90	3541 Periodical postage statement	REW
20091820000495M1	06/10/2009	07/01/2009	8200	PE	-10,938.04	3541 Periodical postage statement	REW
20091820000900M1	06/10/2009	07/01/2009	8200	PE	-10,755.20	3541 Periodical postage statement	REW
200918200001001M1	06/10/2009	07/01/2009	8200	PE	-10,756.71	3541 Periodical postage statement	REW
20091880000453M1	07/02/2009	07/07/2009	8200	PE	-11,043.59	3541 Periodical postage statement	TMP

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Exhibit 8: BMEU/DMU acceptance unit internal screen: BMEU menu Reports > Mailing Reports

USPS FORGIVENESS PROGRAM: FEDERAL MACHINES EQUIPMENT

File Edit View Favorites Tools Help

Address: https://hem.uspspostalone.com/postal/index.cfm?com=false

UNITED STATES POSTAL SERVICE® Feedback Personal Profile Logout

You are in the Text Environment for Mailers (TEM)
Redlined Information

Reports > Transaction History Reports > CAPS Transaction History > Mailings Summary > Receipt  Today's Date: 07/08/2009

3541		US Postal Service Periodicals Statement of Mailing - P.S. 3541- Regular		Final	
Postage Statement: 70079730		Mailer's Job#: CRAIG61a		TRANS # 200918100000688M1 CAPS TRANS NO: 20090630000000600M1	
ADVERTISING AGE 390 N. MICHIGAN AVENUE CHICAGO, IL 60601-3806					
USPS Per. #: 8200	Mailing Date: 06/10/2009	Location: 00007	Finance Number: 96-6490		
CAPS Acct NO: 10578		Caps Customer Ref. ID:			
Consider mail dates: 06/10/2009 to 06/10/2009 Consider mail statements: N/A to N/A Consider issue dates: 06/01/2009 to 06/01/2009					
Press cat: Flat (FL)	Comments:			VERIFICATION SUMMARY: Verification Not Required	
Issue: N/A Edition: 4					
Weight of Single Ride-Along Piece: N/A		Weight per Copy for Issue: N/A		Advertising Percentage in this Issue: N/A	
Caps Customer Ref. ID: N/A (CPP)			Mailing at: PEWaukee, WI 53072-9999		
In-County					
Pound Price: <i>(Per pound or fraction)</i>					

Exhibit 9: BMEU/DMU acceptance unit internal screen: CAPS Transaction Receipt accessed from Mailing Reports.

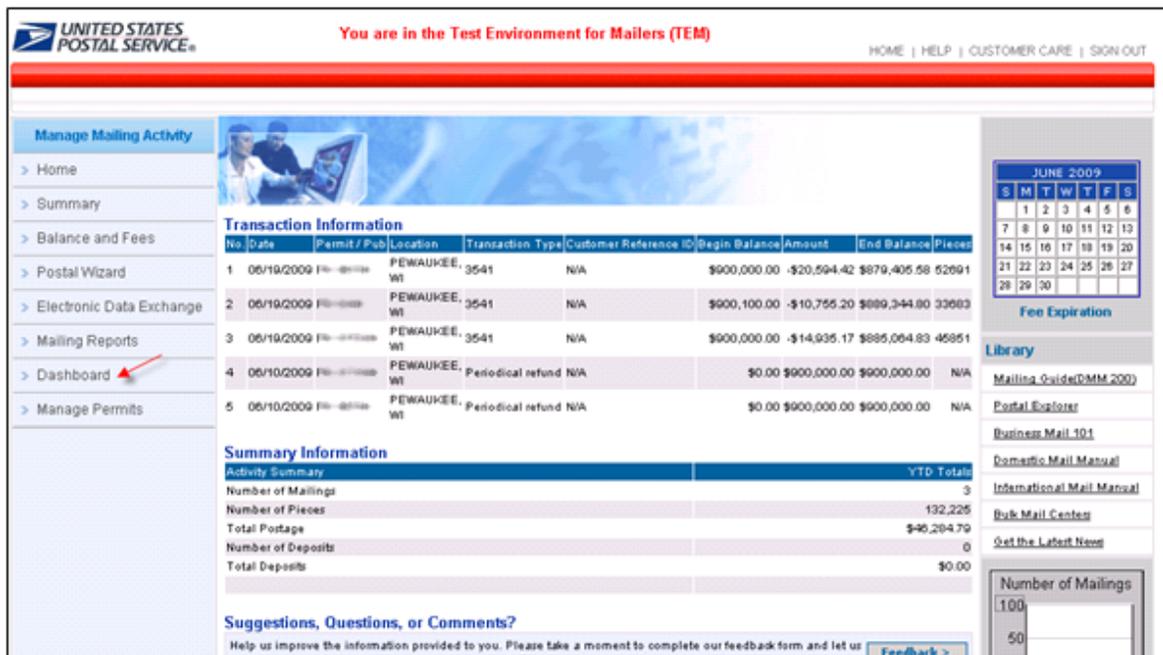
Section 3: Screen Flows

The screens provided below represent transaction flows, reports access and CPP processes that you will tend to need on a frequent basis. All screen flows described in this section assumes you are logged into the Business Customer Gateway and in the TEM. The following screen flows are presented in this section (Note that all screen flows apply to all Periodicals mailers –not just CPP).

-  Accessing the Dashboard - Screen Flow 1
-  Updating the Advertising Percentage Worksheet - Screen Flow 2
-  Accessing the Edition Weight Worksheet - Screen Flow 3
-  Creating a Consolidated Payment Request - Screen Flow 4
-  Accessing Postage Statement Register – Screen Flow 5
-  Accessing Issue Level Postage Statement - Screen Flow 6
-  Accessing Issue Level Postage Statement – Screen Flow 7
-  Reviewing Periodical Transactions – Screen Flow 8

3.1 Screen Flow 1: Accessing the Dashboard

Access the Dashboard to submit and review jobs. Select Dashboard from the Manage Mailing Activity menu (Figure D-1). You can also search by Submit Date range, Postage Statement ID, Mailing Group, Preparer Permit #, Permit Holder #, Mailer Location, Mailer Job#, Preparer Permit Type, and Permit Holder Type (Figure D-2). You can Multi-filter by holding down the Ctrl key while making additional selections.



The screenshot shows the United States Postal Service TEM interface. At the top, it says "You are in the Test Environment for Mailers (TEM)". The main navigation menu on the left includes "Manage Mailing Activity", "Home", "Summary", "Balance and Fees", "Postal Wizard", "Electronic Data Exchange", "Mailing Reports", "Dashboard" (highlighted with a red arrow), and "Manage Permits". The main content area displays "Transaction Information" with a table of 5 transactions. Below that is "Summary Information" with a table of activity summary metrics. On the right, there is a calendar for June 2009, a "Fee Expiration" section, and a "Library" section with links to various manuals.

No	Date	Permit / Pub	Location	Transaction Type	Customer Reference ID	Begin Balance	Amount	End Balance	Pieces
1	06/19/2009	FI-000000	PEWAUKEE, WI	3541	N/A	\$900,000.00	-\$20,594.42	\$879,405.58	52691
2	06/19/2009	FI-000000	PEWAUKEE, WI	3541	N/A	\$900,100.00	-\$10,755.20	\$889,344.80	33603
3	06/19/2009	FI-000000	PEWAUKEE, WI	3541	N/A	\$900,000.00	-\$14,935.17	\$885,064.83	45951
4	06/10/2009	FI-000000	PEWAUKEE, WI	Periodical refund	N/A	\$0.00	\$900,000.00	\$900,000.00	N/A
5	06/10/2009	FI-000000	PEWAUKEE, WI	Periodical refund	N/A	\$0.00	\$900,000.00	\$900,000.00	N/A

Activity Summary	YTD Total
Number of Mailings	3
Number of Pieces	132,225
Total Postage	\$46,204.79
Number of Deposits	0
Total Deposits	\$0.00

Figure D-1: TEM Landing Page

Upon selecting the Dashboard from the Manage Mailing Activity menu, the Dashboard Management System homepage displays (Figure D-2).

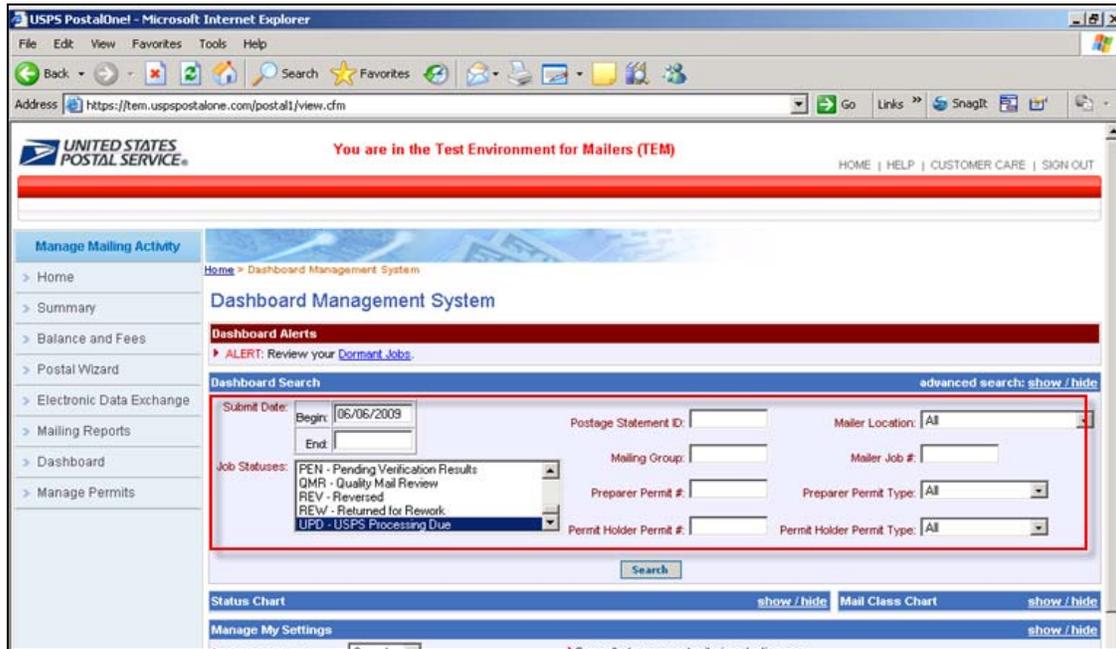


Figure D-2: Dashboard Management System

To access a job, you have options to search by Submit Date, Job Status (e.g., UPD, FPP, EST, FIN Postage Statement ID, FIN), Mailing Group, Preparer Permit #, Permit Holder Permit #, Mailer Location, Mailer Job #, Preparer Permit Type, and Permit Holder Permit Type. The most direct way is to search by Job Status. In the example screen, the user selected search criteria by *Include all Job Status – All* (Figure D-2).

2.1 Screen Flow 2: Updating Advertising Percentage

The following screen flow demonstrates how (Publisher or its agent) to update the Advertising Percentage using the worksheet. First access the Dashboard through the TEM and enter search criteria for the job (Figure D-2).

- Manage Mailing Activity
- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Home > Dashboard Management System

Search Results

My Search Criteria Selections [show / hide](#)

Legend: [!] for spoilage adjustment. [*] for USPS adjusted entry. [F] for Full-Service statements [M] for Mixed-Service statements

14 jobs found, displaying all jobs.

1

Job ID	Mailing Group ID	Postage Statement ID	Verification Due	Mailing Date	Submit Date	Job/Publication Name	Permit/USPS Number	Mail Class	Pieces	Postage (\$)	Job Status
+ [Job ID]	69264803	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
+ [Job ID]	69264802	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
+ [Job ID]	69264801	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$45,777.79	Multiple
- [Job ID]	69264800				06/19/2009	20090608		PE	132,225		
+ [Job ID]	69264799	Multiple	No	06/10/2009	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
+ [Job ID]	69264798	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
- [Job ID]	69264781				06/19/2009	20090608		PE	132,225		
+ [Job ID]	69264761	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,089.81	FIN
+ [Job ID]	69264760	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$47,588.87	FIN
+ [Job ID]	69264758	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$47,252.98	FIN
+ [Job ID]	69264671	Multiple	No	Multiple	06/18/2009	20090608	Multiple	PE	132,225	\$48,003.01	FIN
+ [Job ID]	69264407	Multiple	No	Multiple	06/16/2009	20090608	Multiple	PE	132,225	\$46,284.79	FIN
- [Job ID]	69264130				06/12/2009	20090608		PE	132,225		
+ [Job ID]	69264036	Multiple	No	Multiple	06/11/2009	20090608	Multiple	PE	132,225	\$46,284.79	Multiple

Export options: [CSV](#) | [Excel](#) | [PDF](#)

[Refresh My Results](#) [Modify My Search](#) [Start New Search](#)

Status Chart [show / hide](#) **Mail Class Chart** [show / hide](#)

Figure A-1: All Jobs ID display according to Dashboard search criteria entered by the user (from Fig D-2)

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Home > Dashboard Management System

Search Results

My Search Criteria Selections show / hide

Legend: [*] for spoilage adjustment. [**] for USPS adjusted entry. [F] for Full-Service statements [M] for Mixed-Service statements

14 jobs found, displaying all jobs.

1

+	Job ID	Mailing Group ID	Postage Statement ID	Verification Due	Mailing Date	Submit Date	Job/Publication Name	Permit/USPS Number	Mail Class	Pieces	Postage (\$)	Job Status
+	69264747	69264803	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
+	69264748	69264802	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
+	69264749	69264801	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$45,777.79	Multiple
-	69264750	69264800				06/19/2009	20090608		PE	132,225		
-	69264751	69264799	Multiple	No	06/10/2009	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
-	69264752	69264798	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,284.79	UPD
		PS# 70019841 [cid 570235]			06/10/2009	06/19/2009	<small>ACTIVATION PERMIT, CHASE COMMERCIAL SERVICES INC. (1st Issue No:23 Issue Date:2009-06-01)</small>	PE 8200	PE	33,683	\$10,755.20	UPD
		PS# 70019843 [cid 570235]			06/10/2009	06/19/2009	<small>ACTIVATION PERMIT, CHASE COMMERCIAL SERVICES INC. (1st Issue No:23 Issue Date:2009-06-01)</small>	PE 377030	PE	45,851	\$14,935.17	UPD
+		PS# 70063890 [cid 570235]				06/19/2009	20090608		PE	132,225	N/A	UPD
		PS# 70019842 [cid 570235]			06/10/2009	06/19/2009	<small>ACTIVATION PERMIT, CHASE COMMERCIAL SERVICES INC. (1st Issue No:83 Issue No:23 Issue Date:2009-06-01)</small>	PE 387030	PE	52,691	\$20,594.42	UPD
-	69264753	69264781				06/19/2009	20090608		PE	132,225		
+	69264754	69264761	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$46,889.81	FIN
+	69264755	69264760	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$47,588.87	FIN
+	69264756	69264758	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$47,252.98	FIN
+	69264757	69264671	Multiple	No	Multiple	06/18/2009	20090608	Multiple	PE	132,225	\$48,003.01	FIN
+	69264758	69264407	Multiple	No	Multiple	06/16/2009	20090608	Multiple	PE	132,225	\$46,284.79	FIN
-	69264759	69264130				06/12/2009	20090608		PE	132,225		
+	69264760	69264036	Multiple	No	Multiple	06/11/2009	20090608	Multiple	PE	132,225	\$46,284.79	Multiple

Export options: [CSV](#) | [Excel](#) | [PDF](#)

[Refresh My Results](#)

[Modify My Search](#)

[Start New Search](#)

Status Chart

[show / hide](#)

Mail Class Chart

[show / hide](#)

Figure A-2: Select Job ID by double clicking the Job ID or select "+" to explode Job ID, then select postage statement with customer ID number (cid).

- Manage Mailing Activity
- Home
- Summary
- Balance and Fees
- Postal Wizard
- Electronic Data Exchange
- Mailing Reports
- Dashboard
- Manage Permits

Home > Dashboard Management System

Job Detail

Job Information Summary							
Mailing Agent: 89264803			Mailing Date: 06/19/2009				
Job Name: 20090608			Submit Date: 06/19/2009				
Job ID: 0766888			Last Activity Date: 06/19/2009				
Mailing Group ID: 69264803			Mailing % Complete: 0.00				
Legend: [*] for spoilage adjustment. [**] for USPS adjusted entry. [F] for Full-Service statements [M] for Mixed-Service statements							
Postage Statement ID	Verifications	Available Report(s)	Permit/USPS Number	Status	# of Pieces	Postage \$	
PS# 70021311 [oid:570240]			PE 30700	UPD	52,691	\$20,594.42	
PS# 70021017			PE 30700	CON	6	\$2.19	
PS# 70021018			PE 30700	CON	5	\$1.81	
PS# 70021019			PE 30700	CON	263	\$83.42	
PS# 70021020			PE 30700	CON	115	\$41.59	
PS# 70021021			PE 30700	CON	56	\$20.18	
PS# 70021022			PE 30700	CON	124	\$40.89	
PS# 70021023			PE 30700	CON	930	\$342.27	
PS# 70021024			PE 30700	CON	185	\$58.45	
PS# 70021025			PE 30700	CON	78	\$26.95	
PS# 70021273			PE 30700	CON	3	\$1.38	
PS# 70021274			PE 30700	CON	3	\$1.17	
PS# 70021275			PE 30700	CON	4	\$1.29	
PS# 70021276			PE 30700	CON	857	\$307.82	
PS# 70021300			PE 30700	CON	348	\$91.07	
PS# 70021301			PE 30700	CON	1,158	\$335.28	
PS# 70021302			PE 30700	CON	201	\$71.29	
PS# 70021303			PE 30700	CON	45	\$15.14	
PS# 70021304			PE 30700	CON	48	\$18.92	
PS# 70021305			PE 30700	CON	120	\$46.67	
PS# 70021306			PE 30700	CON	12	\$4.49	
PS# 70021307			PE 30700	CON	152	\$48.68	
Note: EST, CAN, and CON statements are not included in the TOTALS.					TOTAL:	132,225	\$46,284.79

eDocumentation Summary			
Name of Report Available	# of Reports	# of Pieces	Postage(\$): (Estimated/Actual)
Outside County Container Report	1		
Qualification Report(s)	1	132,225	
Version Summary Report	1		
Reconciliation Report	1		

[Return To Search Results](#)

Figure A-3: The Job Detail page displays when a Job ID hyperlink is double clicked from the Search Results page. Note: This screen was cropped in several areas to allow a full page display.

Job Detail. Select any one Job ID to access the Job Detail page, which displays all files associated with the selected job, file upload date and time, and upload status. You can access the **Outside County Container Report, Qualification Report, Version Summary Report and Reconciliation Report** from the links at the bottom of the page.

UNITED STATES POSTAL SERVICE® You are in the Test Environment for Mailers (TEM) HOME | HELP | CUSTOMER CARE | SIGN OUT

You are in the Test Environment for Mailers (TEM)

Restricted Information Today's Date: 06/25/2009

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Dashboard > Display

Mailing Group Summary Information

Mailing Group ID: 60264798 Mailer's Job #: [REDACTED] Open Date: 06-19-09
 Preparer: [REDACTED] Finance No: 566490 Close Date: [REDACTED]
 Description: 20090608

Combined Mailing Summary Information

Mailing Group Summary Information

Mailing Group ID: [REDACTED] Mailer's Job No: [REDACTED] Container Ship Date: [REDACTED]
 Preparer: [REDACTED] Description: 20090608

Master Statement Information

Post Office of Mailing: PEWAUKEE, WI 53072-9998 Software: [REDACTED]
 Form Type: PE DMM: [REDACTED]

Permit No	Permit Holder's Name	Postage Due Permit No	Postage Due Permit Holder's Name	Postage Statement No	Total Pieces	Total Postage	Postage Afforded	Net Postage Due	VAR
PE 8298	[REDACTED]			PS 70019841 (CPP)	33,683	\$ 10,755.2000	\$ 0.000	\$ 10,755.20	
PE 36796	[REDACTED]			PS 70019842 (CPP)	52,691	\$ 20,594.4200	\$ 0.000	\$ 20,594.42	
PE 377938	[REDACTED]			PS 70019843 (CPP)	45,851	\$ 14,935.1700	\$ 0.000	\$ 14,935.17	
TOTALS					132,225	\$ 46,284.79	\$ 0.00	\$ 46,284.79	

USPS Use Only

Perform Verification:		Verification data not available at this time.	
One Pass/Two Pass Verification			
Received:	Error Percentage:	Additional Postage:	\$ 0.00
A/R/C:	Cost Avoidance:	Verifying Employee's Name:	
Total Additional Postage:	\$ 0.00	Number of Reworked Pieces:	

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Figure A-4: Combined mail Postage Statements display by permit number within the Job ID

To access the Advertising Percentage Worksheet, select one of the postage statements (highlighted in the red box). When a postage statement number is selected, the Verification Statement (PS Form 3541) displays (Figure A-5).

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You are in the Test Environment for Mailers (TEM)

Restricted Information

Today's Date: 06/25/2009

Dashboard > Verification Statement > Display

Mailing Group Summary Information

Mailing Group ID: 69264798	Preparer: [REDACTED]	Description: 20090609	Maile's Job #: [REDACTED]	Finance No: 566490	Open Date: [REDACTED]	Close Date: 06-19-09
----------------------------	----------------------	-----------------------	---------------------------	--------------------	-----------------------	----------------------

PS # 70019941, UPD Cancel | Register | Edition Weight Worksheet | **Advertising Percentage Worksheet**

Facsimile of Form 3541

PS Form 3541 - Periodicals - Combined Mailing

Planned

United States Postal Service Classroom
 Nonprofit
 Regular
 Science-of-Agriculture

Periodicals - Combined Mailing Post Office: Note Mail Arrival Time

Periodicals mailings of different copy weights must be reported on separate statements.
Noncommingled nonsubscriber copies over the 10% limit are notmailable at Periodicals prices.

Mailer Information

Publication Title and Owner or News Agent's Name [REDACTED] Customer Ref. ID: (CPP)	Maile's Name, Address, Telephone Number, and Email [REDACTED] jhorlino@psn.com	Entry Post Office Name, State, and ZIP+4 PEWAUKEE WI 53072
---	--	---

Mailing Information

Publication No. 8200	Edition/Code: 4	Process Category: Flats	Mailing Date: From 06/10/2009 to 06/10/2009	Statement Sequence No.: First: Last:
Issue Date: First: 06/01/2009 Last: 06/01/2009	Volume Number: 80	Issue Number: 23	Issue Frequency: 1/year	
Weight of Single Ride-Along Piece: N/A	Weight per Copy for Issue: N/A	Advertising Percentage in This Issue: N/A		
Total Addressed Pieces: 33583 pcs.		Total Postage: \$ 10,755.20		
No of Containers:	1' MM Trays:	2' MM Trays:	2' EMM Trays:	Flat Trays: Saks: 1070 Pallets: 131 Other:
For Automation Price Pieces, Enter Date for Address Matching and Coding 01/01/0001	For Carrier Route Price Pieces, Enter Date for Address Matching and Coding 01/01/0001	For Carrier Route Price Pieces, Enter Date of Carrier Route Sequencing 01/01/0001		

Combined Mailing Yes No

Outside-County
Part B - Advertising Pound Price

Entry Zone	Subscriber Copies	Nonsubscriber Copies	Total Copies	Total Pounds	Advertising Pounds	Price	Postage
B2 DSCF	7788	7258	15046	2615	1318	0.200	263.8000
B3 DAD C	1875	1941	3816	665	337	0.212	71.4440
B4 1 & 2	4397	4182	8579	1496	754	0.237	178.8980

Figure A-5: Verification Statement (PS For 3541 Periodicals Combined Mailing) displays. Note this screen was cropped to display fittingly in the document.

The Advertising Percentage Worksheet displays when the Advertising Percentage Worksheet link is selected (Figure A-6).

UNITED STATES POSTAL SERVICE® [Home](#) | [Help](#) | [Customer Care](#) | [Sign Out](#)

[Home](#) > [Dashboard](#) > [Postage Statement](#) > [Advertising Percentage Worksheet](#)

Mailing Group Summary Information

Title: [redacted] **USPS Publication No.:** 8000

Issue Date: 06/01/2009

Vol. No.: 80 **Issue No.:** 23

Job Name: 20090608 **Contact Name:** [redacted]

Job ID: [redacted] **Contact Phone No.:** [redacted]

Postage Statement Stage: UPD **Contact Email:** [redacted]

Acceptance Office: PEWAUKEE, WI 53072-9998

Accept all advertising percentages as final [Download](#) [MPU View](#)

Component Advertising Percentage Worksheet

Component ID	Component Description	Component Estimated Ad%	Component Final Ad%	Component Ad% Difference
00000004	AA0001	50.00	50.00	0.00

[Abandon](#) [Submit >](#) [< Back](#)

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Figure A-6: Advertising Percentage Worksheet (component view)

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Download Ad Percent Worksheet

- Excel (XLS)
- Comma Separated Values (CSV)
- Portable Document Format (PDF)

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[Download](#) [Component View](#)

Estimated Ad%	Final MPU Ad%	Ad% Difference	No. of Copies
50.00	50.00	0.00	35623
			35623
			35623

MPU ID	MPU Name	MPU Description
00004	A	AA0001

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Figure A-7: The Advertising Percentage Worksheet can be downloaded in xls, .csv or pdf.

Mailing Group Summary Information

Title: [REDACTED] USPS Publication No.: [REDACTED]

Issue Date: 06/01/2009 Issue No.: 23

Vol. No.: [REDACTED] Contact Name: [REDACTED]

Job Name: [REDACTED] Contact Phone No.: [REDACTED]

Job ID: [REDACTED] Contact Email: [REDACTED]

Postage Statement: UPD

Acceptance Office: PEVAUKEE, VI 53072-9999

Component Advertising Percentage Worksheet

Component ID	Component Description	Component Estimated	Component Final	Component Ad%
4	AA0001	50.00	50.00	0.00

Component Advertising Percentage Worksheet - MPU View

Mailing Date	Version ID	MPU Name	MPU Estimated Ad%	Final MPU Ad%	Ad%	No. of
20090610	4	4	50.00	50.00	0.00	35623
Subtotal No. of Copies						35623
Sum Total For Mailing						35623

MPU ID	MPU Name	MPU Description
00004	4	AA0001

Figure A-8: The Advertising Percentage Worksheet download sample in xls.

UNITED STATES POSTAL SERVICE

Home | Help | Customer Care | Sign Out

Home > Dashboard > Postage Statement > Advertising Percentage Worksheet > MPU View

[Download](#) [Component View](#)

Component Advertising Percentage Worksheet - MPU Summary

Mailing Date	Version ID	MPU Name	MPU Estimated Ad%	Final MPU Ad%	Ad% Difference	No. of Copies
20090610	00004	4	50.00	50.00	0.00	35623
Subtotal No. of Copies						35623
Sum Total For Mailing						35623

MPU ID	MPU Name	MPU Description
00004	4	AA0001

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Figure A-9: The Advertising Percentage MPU view, accessed from the Ad % Worksheet where the MPU link is provided.

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Restricted Information

Dashboard > Postage Statement > Edition Weight Worksheet

Today's Date: 08/23/2009

Mailing Group Summary Information

Title: [REDACTED] USPS Publication No.: 000000

Issue Date: 08/01/2009

Vol. No.: 83

Job Name: 20090608

Job ID: [REDACTED]

Postage Statement Stage: UPD

Acceptance Office: PEWAUKEE, WI 53072-9999

Issue No.: 23

Contact Name: [REDACTED]

Contact Phone No.: [REDACTED]

Contact Email: [REDACTED]

MPU View

Component ID	Component Description	Component Weight Source	Component Weight Status	Component Weight	USPS Verified Weight	Weight % Difference
00000001	AN0002	C	N	00.5684	00.5690	00.1054
00000002	AN0010	C	N	00.4249	00.4249	00.0000
00000003	AN0011	C	N	00.4943	00.4011	-23.2361

There is 1 out of 3 (33.33%) weights that are outside the tolerance when compared to estimated weights.

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Figure E-2: The Edition Weight Worksheet (Publisher view – no data entry privilege)

- The Mail.dat .cpt Component Description appears in the edition weight worksheet. The description is available for a mailer to use as desired. It should carry a unique name or code for each specific subcomponent or whole portion of the mailpiece. If the description is for an enclosure, it should be an accurate description. For example, if an incidental enclosure is described as a non-incidental, this leads to confusion as the Postal Clerk will expect to see another postage statement for the enclosure when in fact the weight of the enclosure and the postage is already included in the Periodicals postage statement.

2.3 Screen Flow 4: Creating a Consolidated Payment Request

Notes on Payment Requests

- The Publisher may make a payment request to consolidate the desired Mail.dat jobs together into one payment provided those jobs are in FPP status, at a single acceptance office and for a single publication title and issue. The payment request causes the statements to move to status FIN and one payment is deducted from the CAPs account at midnight central time.
- After 28 days from the first date of mailing, if no payment request has been requested, the system automatically files the payment request. The payment request causes the statements to move to status FIN and one payment is deducted from the CAPs account at midnight central time.

The following screen flow demonstrates how to perform a payment request through the Postal Wizard and Consolidated Payment Request route. The alternate route is through the Dashboard (refer to the section that follows).

To create a consolidated payment request, first access the Postal Wizard, then click the Consolidated Payment Request link on the Postal Wizard page in *PostalOne!* (Figure P-1).

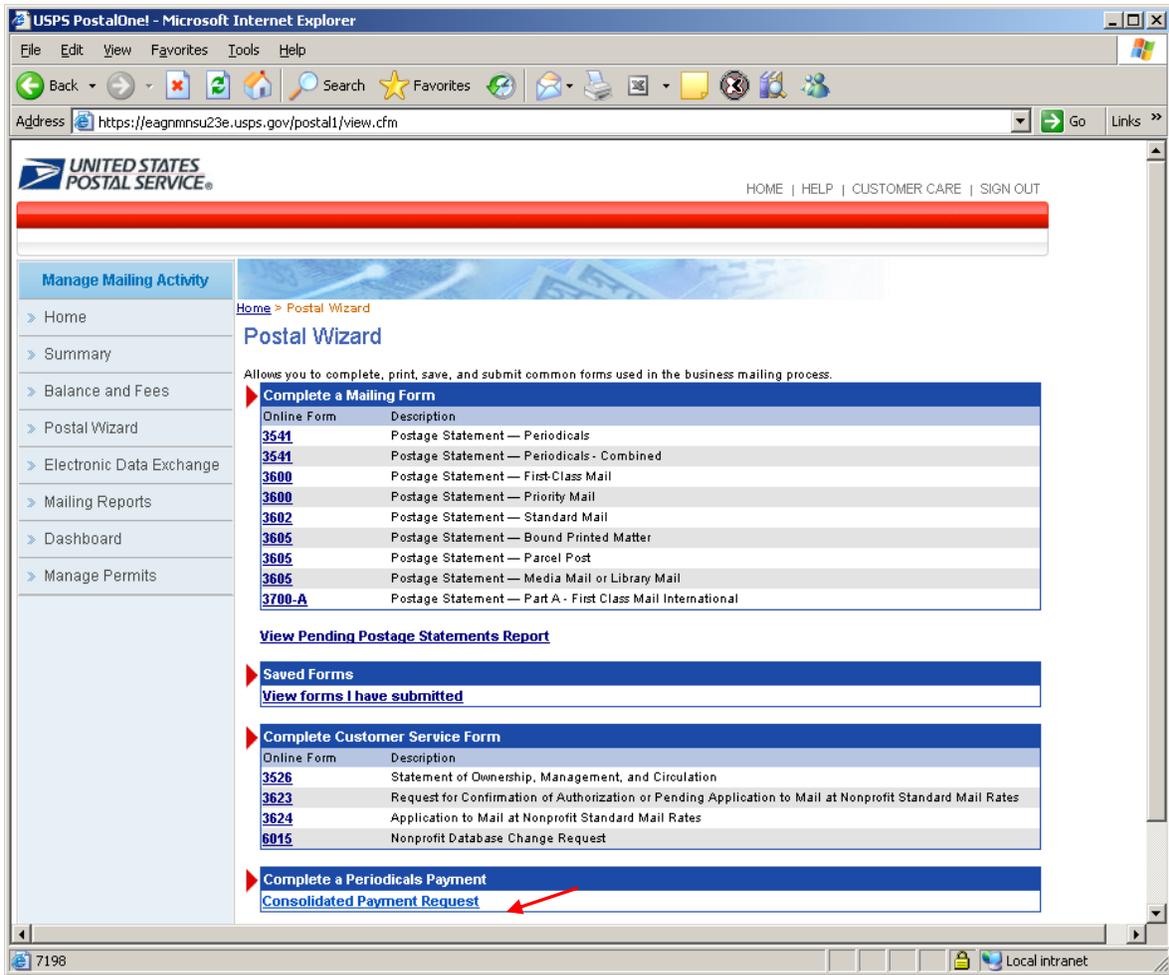


Figure P-1: Consolidated Payment Request using the Postal Wizard

Select the consolidated Payment Request link at the bottom of the page, indicated by the red arrow. Once the Consolidated Payment Request link is selected, a list of eligible PS Forms are displayed, which are available for creating a payment request (Figure P-2).

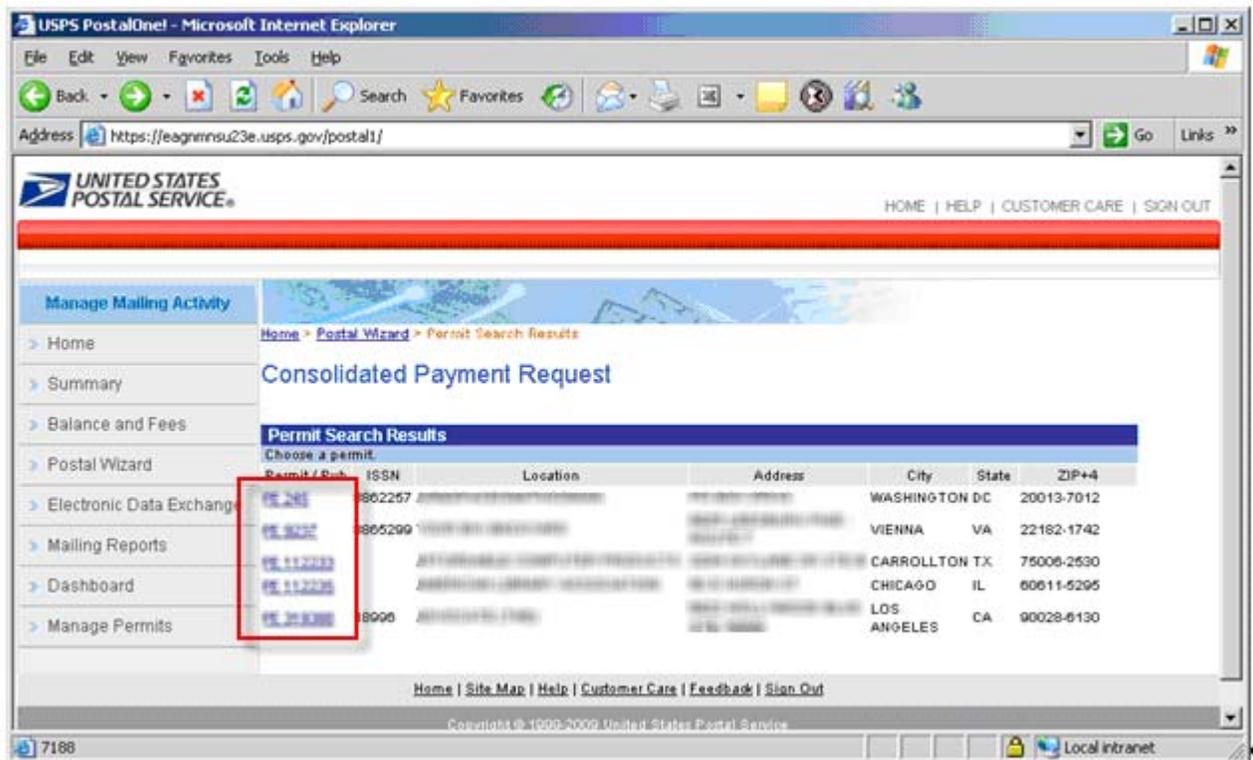


Figure P-2: List of eligible publications (assessed from Consolidated Payment Request link on Dashboard)

After selecting a specific (PE permit link) publication (refer to the red box), the Consolidated Payment Request – Home screen for the publication displays (Figure P-3). From this screen, you can view postage statements in FPP status, eligible to be added to a consolidated payment request, create new consolidated payment requests, modify existing consolidated payment requests, and view details of completed consolidated payment requests.

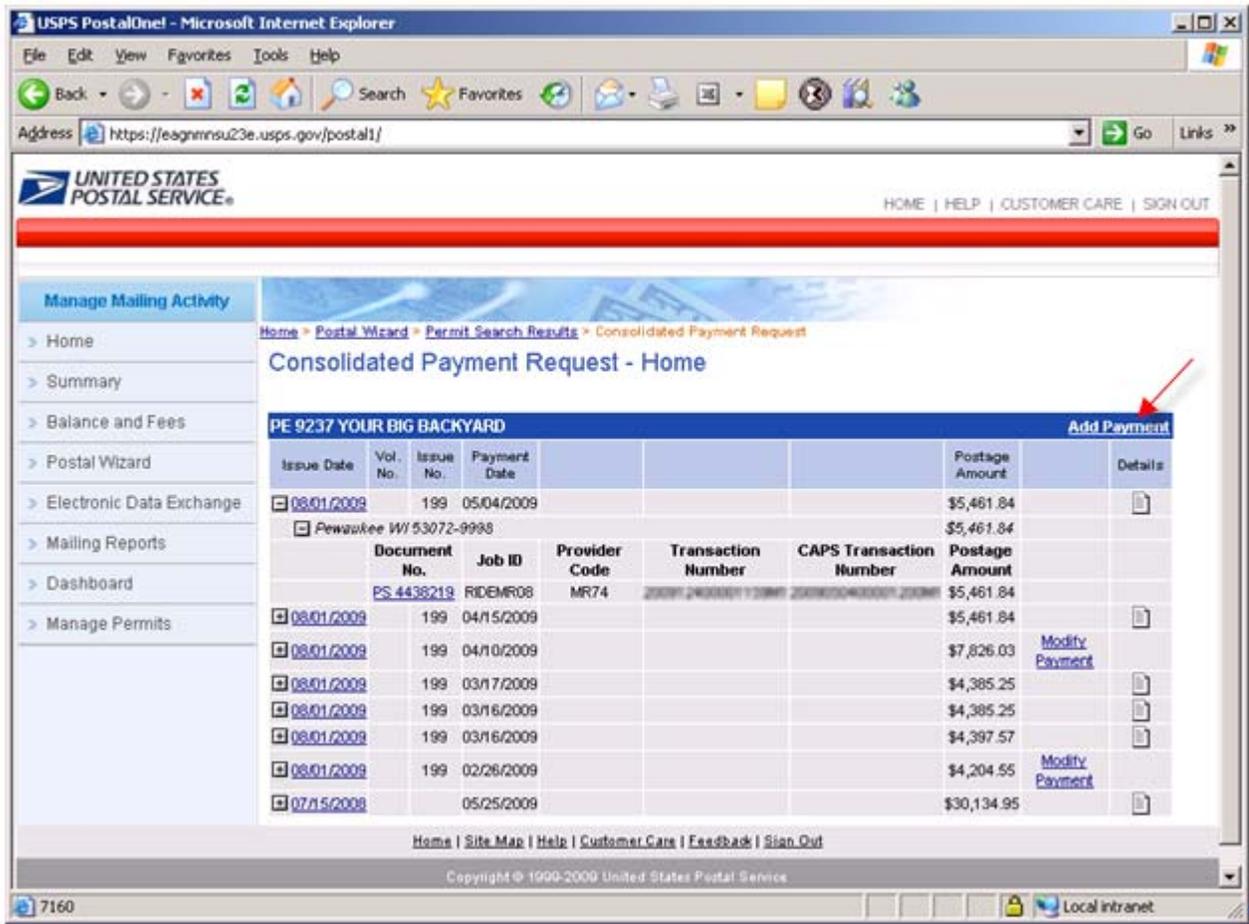


Figure P-3: Consolidated Payment Request home screen for the publication displays

To create a consolidated payment request, select the Add Payment link. (Figure P-3). The Consolidated Payment Request, Add Payment (Search) screen then displays (Figure P-4).

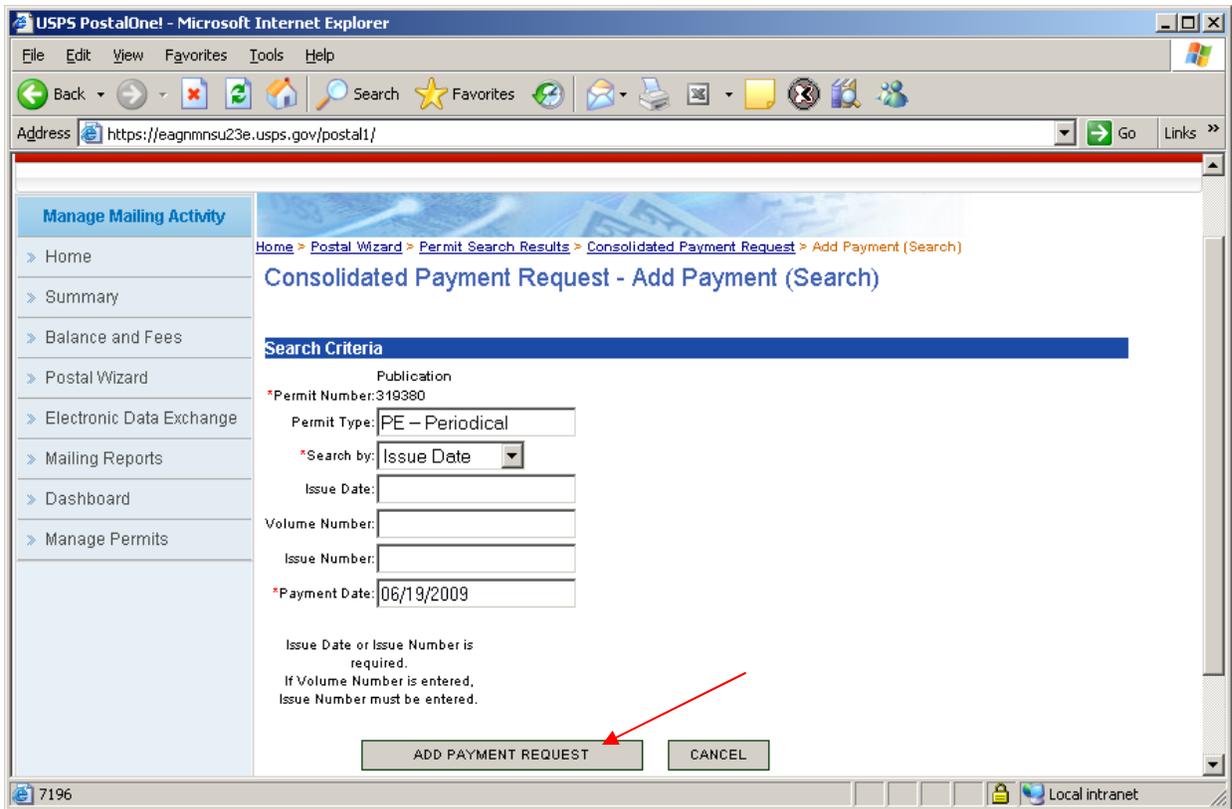


Figure P-4: Consolidated Payment Request – Add Payment screen

You will be required to enter either the issue date or issue number and volume number (optional) to display the postage statements available for payment, then click the ADD PAYMENT REQUEST link (Figure P-4). All matching postage statements in FPP status will be displayed (Figure P-5).

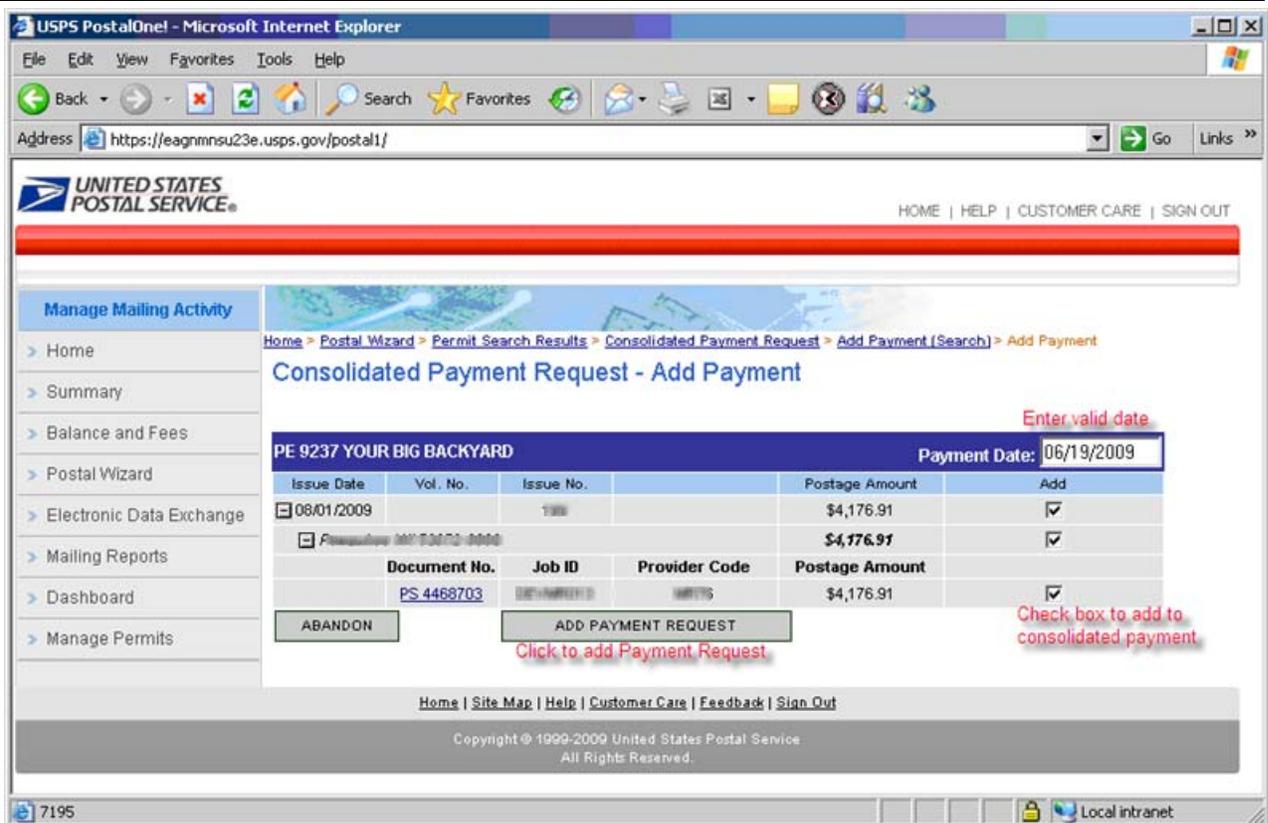


Figure P-5: Consolidated Payment Request – Add Payment screen

You can select the postage statements to include in the consolidated payment request. A payment date field will be available to enter any payment date for the request provided that the date is not later than 28 days past the earliest mailing date in the selected postage statements (Figure P-5). Click the ADD PAYMENT REQUEST button to create the payment request.

- The system presents the owner with a list of all active CAPS permits at the acceptance offices attached to their owner view with active CPP indicators at the original entry office
- Only postage statements where the advertising percentages have been finalized are eligible to be added to a payment.

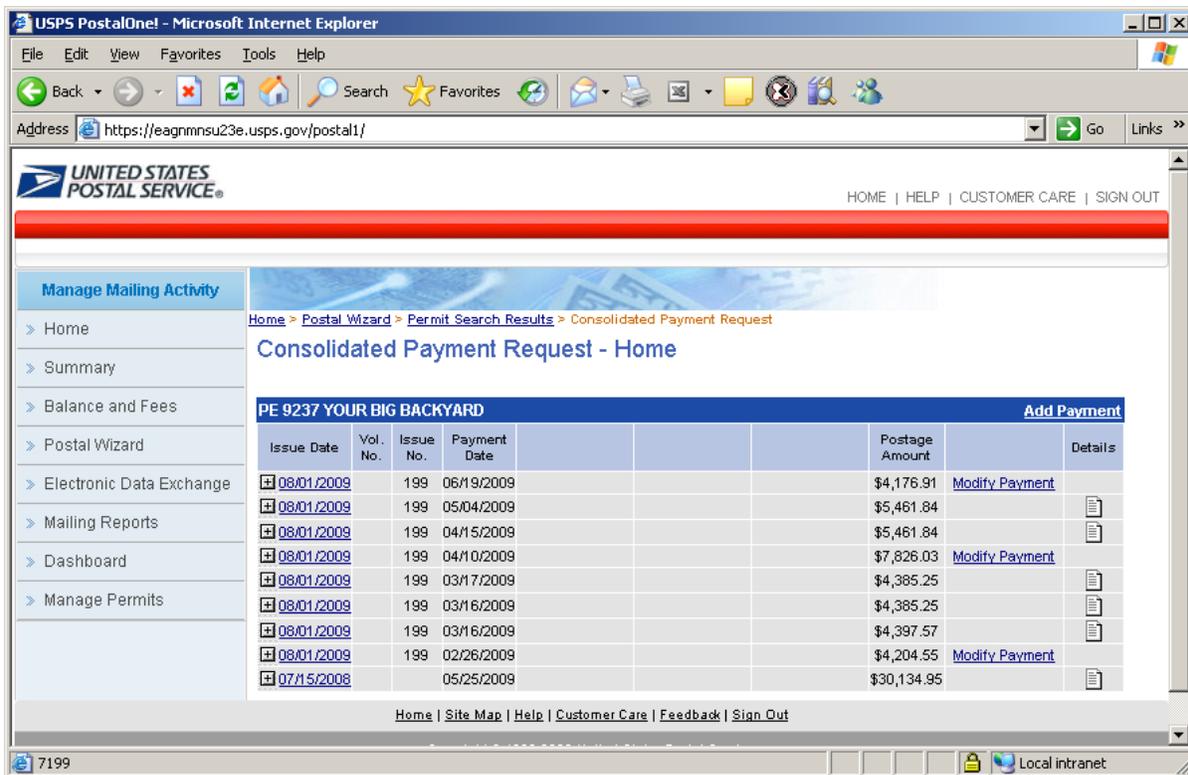


Figure P-6: After you click the Add Payment Request button (Figure P-5), you will be taken back to the Consolidated Payment Request – Home screen (Figure P-3).

2.4 Screen Flow 5: Creating a Consolidated Payment Request from the Dashboard

To Create a Consolidated Payment Request from the Dashboard, follow the same steps below which are essentially the same screen flow for accessing the Advertising Percentage Worksheet. Note the Advertising Percentage must be marked as final when using the Ad % worksheet (versus update Mail.dat file).

- ☛ This screen flow also demonstrates how the Publisher needs to make the Ad % values final before a Consolidated Payment request can be performed.
1. Select the Dashboard from the Manage Mailing Activity Menu (Figure D-1 above)
 2. Enter Job search criteria (Figure D-2 above)
 3. Select the Job ID (Figure A-1 above)
 4. Expand or double click the Job ID from the Search Results page (Figure A-2 above)
 5. Select the Postage Statement from the Search Results page (Figure A-2 above)
 6. Select the Postage Statement No. from the list of Postage Statement No listing (Figure R-7 below)
 7. Select the Advertising Percentage Worksheet to access the Ad % Worksheet and update the Ad % value final (Figure R-8 below).
 8. Update the Ad % Worksheet.
 9. Go back to the Dashboard and select (Figure P-1 through P-4 above).the postage statement to create a Consolidated Payment, then select the Add Payment link at the top corner of the page (Figure R010 below).

10. Enter Job ID criteria Consolidated Payment Request – Add Payment (Search) screen (Figure R-11 below).
 11. In the Consolidated Payment Request – Add Payment screen: enter date, check the issue Document number that applies and then select the “ADD PAYMENT REQUEST” (R-12 below).
 12. The system returns an error message that the Ad % Worksheet is not finalized (Figure R-13).
 13. Re-access the Ad % Worksheet and finalize the Ad % Worksheet by checking the “Accept all advertising percentage as final” box (Figure R-14).
 14. Return to the Consolidated Payment Request Home page, then select the ADD PAYMENT LINK at the top right corner (Figure R-14).
 15. Select the Issue date from the Consolidated Payment Request Home page (Figure R-15).
 16. At the Consolidated Payment Request – Add Payment screen: enter the Payment Date, check the Add box (Postage Statement Doc No., Issue and Acceptance Unit) to add, then click the ADD PAYMENT REQUEST button (Figure R-16).
- ☛ If the date entered does not fall within the 28 day range, an error warning message appears. You will be prompted to return to the Consolidated Payment Request – Add Payment screen to enter a valid date (Figure R-17).

Home > Dashboard Management System

Search Results

My Search Criteria Selections [show / hide](#)

Legend: [*] for spoilage adjustment. [**] for USPS adjusted entry. [F] for Full-Service statements [M] for Mixed-Service statements

One job found.

1

Job ID	Mailing Group ID	Postage Statement ID	Verification Due	Mailing Date	Submit Date	Job/Publication Name	Permit/USPS Number	Mail Class	Pieces	Postage(\$)	Job Status
CRAIG618	69264801	Multiple	No	Multiple	06/19/2009	20090608	Multiple	PE	132,225	\$45,747.92	Multiple
	PS# 70063976 [ch 570238] [**]			06/23/2009	06/19/2009	20090608		PE	132,225	N/A	FIN
	PS# 70020724			06/14/2009	06/19/2009	ADVERTISING INC. (FPP) COMMUNICATIONS INC. (FPP) (No. 27 Issue Date 2009-06-01)	PE 8200	PE	33,683	\$10,755.20	FPP
	PS# 70020723			06/14/2009	06/19/2009	ADVERTISING INC. (FPP) COMMUNICATIONS INC. (FPP) (No. 27 Issue Date 2009-06-01)	PE 30700	PE	52,691	\$20,057.55	FPP
	PS# 70020725			06/14/2009	06/19/2009	ADVERTISING INC. (FPP) COMMUNICATIONS INC. (FPP) (No. 27 Issue Date 2009-06-01)	PE 37700	PE	45,851	\$14,935.17	FPP

Export options: [CSV](#) | [Excel](#) | [PDF](#)

[Refresh My Results](#) [Modify My Search](#) [Start New Search](#)

Status Chart [show / hide](#) Mail Class Chart [show / hide](#)

Figure R-7: Postage Statement from the Search Results page

You are in the Test Environment for Mailers (TEM)
Restricted Information

Dashboard > Verification Statement > Display Today's Date: 06/23/2009

Mailing Group Summary Information

Mailing Group ID:	69284801	Mailer's Job #:	00000001	Open Date:	06-19-09
Preparer:	20000608	Finance No.:	566400	Close Date:	
Description:	20000608				

PS # 70020724, FPP (processed by RUTH STOCK on 06/23/2009 01:46:16 PM) Cancel | Register | Edition Weight Worksheet | Advertising Percentage Worksheet

Postage Summary Facsimile of Form 3541

Finalized Pending Payment

United States Postal Service Classroom
 Nonprofit
 Regular
 Science-of-Agriculture Post Office: Note Mail Arrival Time

Periodicals - Combined Mailing

Periodicals mailings of different copy weights must be reported on separate statements.
Noncommingled nonsubscriber copies over the 10% limit are not mailable at Periodicals prices.

Mailer Information

Publication Title and Owner or News Agent's Name JEANIEY'S COACHING AND CONSULTING INC JEANIEY'S COACHING AND CONSULTING INC 1000 W. WISCONSIN AVENUE PEWAWAUKEE, WI 53072-9998 jeantrey@com.com Customer Ref. ID: (CPP)	Mailer's Name, Address, Telephone Number, and Email JEANIEY'S COACHING AND CONSULTING INC 1000 W. WISCONSIN AVENUE PEWAWAUKEE, WI 53072-9998 jeantrey@com.com	Entry Post Office Name, State, and ZIP+4 PEWAWAUKEE WI 53072
--	---	---

Mailing Information

Publication No. 5555	Edition/Code: 4	Process Category: Flats	Mailing Date: From 06/14/2009 to 06/30/2009	Statement Sequence No.: First: Last:			
Issue Date: First: 06/01/2009 Last: 06/01/2009	Volume Number: 80		Issue Number: 23	Issue Frequency: 1/year			
Weight of Single Ride-Along Piece: N/A	Weight per Copy for Issue: N/A		Advertising Percentage in This Issue: N/A				
Total Addressed Pieces: 33683 pos.			Total Postage: \$ 10,755.20				
No. of Postings:	1' MM Trays:	2' MM Trays:	2' EMM Trays:	Flat Trays:	Sacks:	Pallets:	Other:

Figure R-8: Postage Statement in Status FPP displays from the Search Results page (Figure R-7)

UNITED STATES POSTAL SERVICE® Home | Help | Customer Care | Sign Out

Home > Dashboard > Postage Statement > Advertising Percentage Worksheet

Mailing Group Summary Information

Title:	USPS Publication No.:
Issue Date:	06/01/2009
Vol. No.:	
Job No.:	23
Job ID:	20000608
Postage Statement Stage:	FPP
Acceptance Office:	PEWAWAUKEE, WI 53072-9998
Contact Name:	
Contact Phone No.:	
Contact Email:	

[Download](#) [MPU View](#)

Component Advertising Percentage Worksheet

Component ID	Component Description	Component Estimated Ad%	Component Final Ad%	Component Ad% Difference
00000001	AN0002	55.00	55.50	0.50
00000002	AN0010	55.00	54.20	-1.48
00000003	AN0011	55.00	56.00	1.79

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Figure R-9: Updating the Ad% Worksheet from Postage Statement page. In this example the Publisher changed the postage statement in FPP, the third one from 55 to 56.



Figure R-10: Consolidated Payment Request – Add Payment Search screen, select the Add Payment link to create a Consolidated Payment Request.

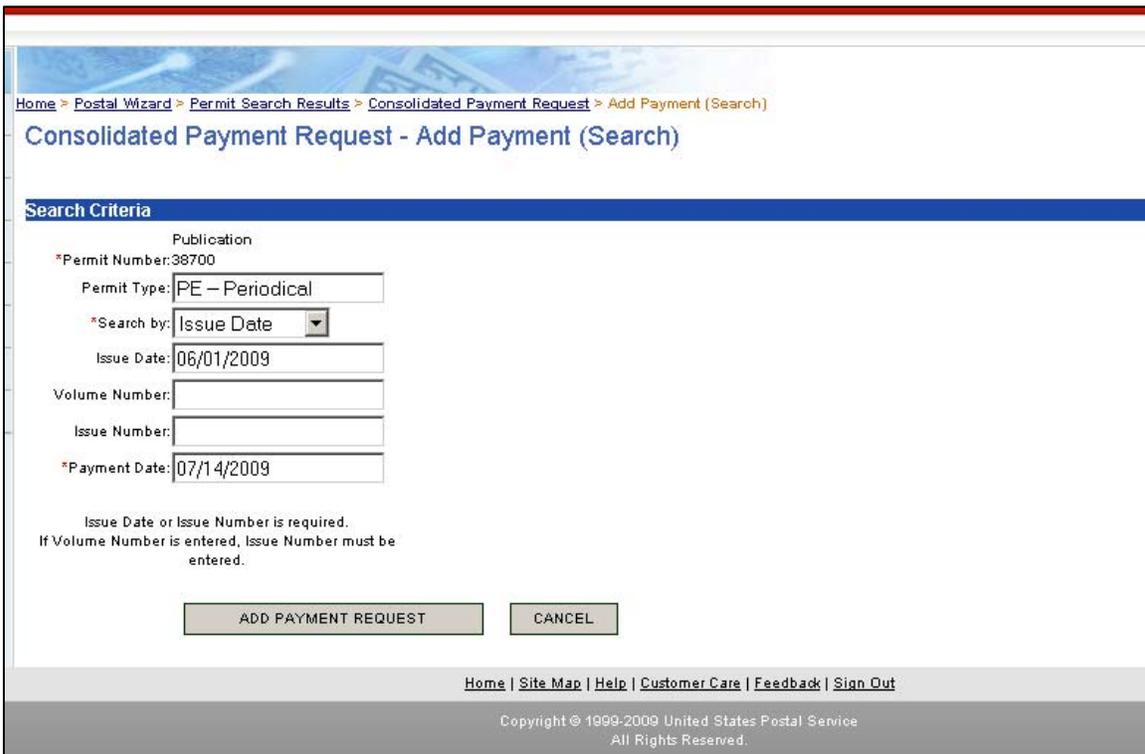


Figure R-11: Consolidated Payment Request – Add Payment Search screen

You will be required to enter either the issue date or issue number and volume number (optional) to display the postage statements available for payment. Then click the Add Payment link (Figure R-11). All matching postage statements in FPP status will be displayed (Figure R-12).

You are in the Test Environment for Mailers (TEM)

HOME | HELP | CUSTOMER CARE

Home > Postal Wizard > Permit Search Results > Consolidated Payment Request > Add Payment (Search) > Add Payment

Consolidated Payment Request - Add Payment

PE 38700 AUTOMOTIVE NEWS Payment Date: 07/14/2009

Issue Date	Vol. No.	Issue No.	Postage Amount	Add
<input type="checkbox"/> 06/01/2009	83	23	\$20,087.42	<input type="checkbox"/>
<input type="checkbox"/> PEWAUKEE, WI 53072-9998			\$20,087.42	<input checked="" type="checkbox"/>
Document No.	Job ID	Provider Code	Postage Amount	
PS 70020723	CRAIG618	CRAI	\$20,087.42	<input checked="" type="checkbox"/>

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Figure R-12: Consolidated Payment Request – Add Payment screen, enter Payment Date, check the add box to add then click the ADD PAYMENT REQUEST button.

Home > Postal Wizard > Permit Search Results > Consolidated Payment Request > Add Payment (Search) > Add Payment

Consolidated Payment Request - Add Payment

The following postage statements cannot be added to the payment request because the advertising percentage worksheet is not finalized:
**PS 70020723

PE 38700 AUTOMOTIVE NEWS Payment Date: 07/14/2009

Issue Date	Vol. No.	Issue No.	Postage Amount	Add
<input type="checkbox"/> 06/01/2009	83	23	\$20,087.42	
<input type="checkbox"/> PEWAUKEE, WI 53072-9998			\$20,087.42	
Document No.	Job ID	Provider Code	Postage Amount	
PS 70020723	CRAIG618	CRAI	\$20,087.42	**

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Figure R-13: Error message appears is the Ad % Worksheet is not finalized.



Figure R-14: Check the Accept box to finalize the Ad % Worksheet



Figure R-15: Return to the Consolidated Payment Request Homepage, then select the Add Payment link at the top right corner.



Figure R-16: Return to the Consolidated Payment Request – Add Payment screen, enter Payment Date, check the add box to add then click the ADD PAYMENT REQUEST button.

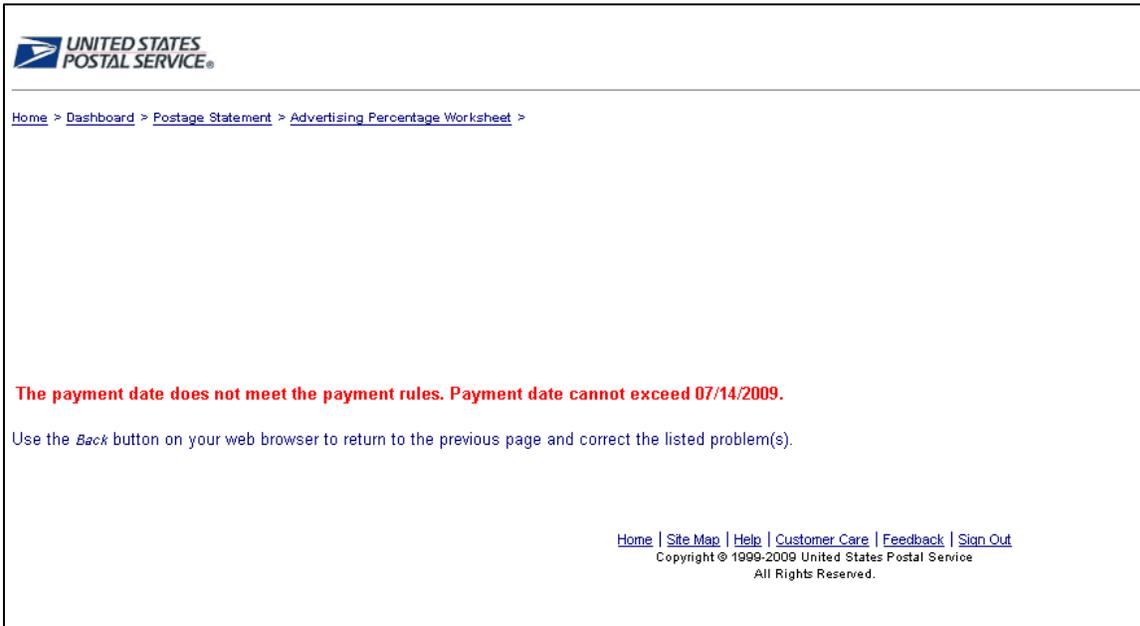


Figure R-17: Note: If the date entered (Figure R-16) does not fall within the 28-day rule, an error warning message appear. You are required to enter a valid date. Refer to the section on the 28-Day rule.

[Transactions](#) > [Permit Search Results](#) > [Consolidated Payment Request](#) > Summary Receipt

Consolidated Payment Request - Summary Receipt

PE <input type="text"/>						Payment Date: 11/16/2009		
Issue Date	Vol. No.	Issue No.				Payment Amount	Reversal Amount	Total
<input type="checkbox"/> 11/16/2009							(\$0.00)	
<input type="checkbox"/> MERCED CA 95340-9998								
	Document No.	Job ID	Provider Code	Transaction Number	CAPS Transaction Number	Postage Amount		
	PS 77176578	00009140	QW00	200932100523842M1	2009111700523900M1			
<input type="checkbox"/> TORRANCE CA 90503-7238								
	Document No.	Job ID	Provider Code	Transaction Number	CAPS Transaction Number	Postage Amount		
	PS 77146805	934462	RRDT	200932100524043M1	2009111700524100M1			

Figure R-18: Summary Receipt

After the payment request is paid in the CAPS system, each item in a payment request is assigned a unique *PostalOne!* System transaction number and a unique CAPS transaction number. The payment request feature moved the payments to the same payment date 11/17/09 shortly after midnight central time on the date of payment. For this case the payment date was 11/16/09, the Julian date 321 in the *PostalOne!* transaction number corresponds to the 11/17/09 date in the CAPS transaction number. (Note in this figure, the total payment amount and customer ID information were removed to protect customer information.)

Upon displaying the postage statement we find the time processed to FIN status: **PS # 77176578, FIN - Transaction # 200932100523842M1** (processed by {Clerk's Initials} on 11/17/2009 12:52:38 AM). There is no longer a record of when the postage statement entered the FPP status.

- The Postal Service cannot process a refund to a CAPS account. For refunds, customers must complete PS form 3533 process, *Application for Refund of Fees, Products and Withdrawal of Customer Account*. Submit this form to the Post Office serving the publication's known office of Publication. The business mail entry clerk will process the refund in PostalOne!; generate PS Form 3533X; and send the customer's 3533 and the system-generated 3533X to the Scanning and Imaging Center who will issue the refund. The refund process may take several weeks.

2.5 Screen Flow 6 Accessing Postage Statement Register

To access the Postage Statement Register, follow the same steps below which are essentially the same screen flow for accessing the Advertising Percentage & Edition Worksheets.

1. Select the Dashboard from the Manage Mailing Activity Menu (Figure D-1 above)
2. Enter Job search criteria (Figure D-2 above)
3. Select the Job ID (Figure A-1 above). Note enter search by selecting by All Job Status if unsure of specific of search criteria
4. Expand or double click the Job ID from the Search Results page (Figure A-2 above)
5. Select the Postage Statement (CPP) (Figure A-4 above)
6. From the Verification Statement (PS Form 3541), select the Register link located at the top of the page (Figure R-1 below). The Postage Statement Register then appears (Figure R-2 below).

UNITED STATES POSTAL SERVICE® HOME | HELP | CUSTOMER CARE | SIGN OUT

Redacted Information

Today's Date: 06/28/2009

Manage Mailing Activity

Dashboard - **Display**

Mailing Group Summary Information

Mailing Group ID: 70419904 Mailing Job #: 10012396 Open Date: 06-28-09

Preparer: [Redacted] Finance No: 250180 Close Date:

Registration: 05070000028 - 10012396

PS Form 3541- Consolidated Periodicals

Final

United States Postal Service

Consolidated Periodicals

Periodicals mailings of different copyweights must be reported on separate statements. Noncommingled nonsubscriber copies over the 10% limit are not eligible at Periodicals price.

Mailing Information

Publication Title and Owner or Newer Agent's Name: [Redacted]

Mailer's Name, Address, Telephone Number, and Email: DIRECTOR WORLD MIDLAND 1700 JAMES SAWYER RD MIDLAND, MI 49002-6987 800698-1345

Entry Post Office Name, State, and ZIP+4: MIDLAND MI 48840

Capa Customer Ref. ID: [Redacted]

Capa Transaction Number: 2009062712331000M1

Mailing Information

Publication No. 743370 Edition/Code: [Redacted] Process Category: [Redacted] Flat: [Redacted] Mailing Date: [Redacted] Statement Sequence No.: [Redacted]

Issue Date: [Redacted] Volume Number: 25 Issue Number: 26 Issue Frequency: 52/year

Weight of Single Rate-Along Piece: N/A Weight per Copy for Issue: N/A Advertising Percentage in This Issue: N/A

Total Addressed Pieces: 30294 pcs Total Adjusted Postage: \$ 7,019.90

No of Containers: 1 MM Tray: 2 MM Tray: 2 EMR Tray: Flat Tray: Sack: 98 Pallets: 7 Other: [Redacted]

For Automation Price Press, Enter Date for Address: [Redacted] For Carrier Route Price Press, Enter Date for Address: [Redacted]

Comments: CAPS Transaction number: 2009062712331000M1

Outside County

Part B: Advertising Round Price

Entry Zone	Subscriber Copies	Nonsubscriber Copies	Total Copies	Total Pounds	Advertising Pounds	Price	Postage
B2 5-DIGIT	25198	4174	29372	4860	2020	0.200	404.0000
B3 5-DIGIT	928	252	1179	81	81	0.212	17.7720
B4 1-6,2	475	223	698	119	55	0.237	13.0590
B5 1	274	187	461	74	33	0.259	8.6570
B6 4	188	147	335	54	25	0.317	7.9250
B7 5	81	53	134	20	11	0.404	4.4940
B8 6	74	31	105	17	9	0.496	4.4040
B9 7	25	19	44	9	5	0.807	3.0250
B10 8	28	32	60	14	8	0.701	5.0050
B11			Subtotal (All Lines B1 through B10)				\$ 469.2300

Part B: Nonadvertising Round Price

Entry Zone	Total Pounds	Advertising Pounds	Nonadvertising Pounds	Price	Postage
B13 5-DIGIT	4905	2020	2879	0.166	471.6180
B14 5-DIGIT	181	81	100	0.176	17.6000
B15 All Other	304	56	158	0.197	31.1200
B16			Subtotal (All Lines B12 through B15)		\$ 469.7420
B17			Found Price Postage Total (B1 plus B16)		\$ 927.9720

Part C: Piece Price

Level	Description	Copies	Addressed Pcs.	Price	Postage
C1 Mixed ABC	Revised	397	397	0.403	159.9910
C2 Mixed ABC	Nonrevised	17	17	0.256	7.2550
C3 ABC	Revised	323	323	0.277	121.7710
C4 ABC	Nonrevised	22	22	0.400	8.8000
C5 3-Digit	Revised	1378	1378	0.262	360.8960
C6 3-Digit	Nonrevised	105	105	0.263	40.2150
C7 5-Digit	Revised	12402	12402	0.276	3411.2200
C8 5-Digit	Nonrevised	28	28	0.298	7.4560
C25 Rate	Carrier Route & Firm Bundles	15395	15395	0.179	2.738.5300
C26 Firm Bundles		2297	209	0.178	37.2020
C29	Subtotal (All Lines C1 through C26)	32922	30084		\$ 7,051.4900
C30 Nonadv. %				0.00098	\$ 1,935.9558
C31	Total Part C: Total Piece Price Postage				\$ 8,987.4458

Part D: Bundle Price

Container Level	Bundle Level	Bundles	Price	Postage
D1 Mixed ABC	Mixed ABC	22	0.077	1.5940
D2 Mixed ABC	ABC	38	0.201	7.6380
D3 Mixed ABC	3-DigitSCF	24	0.287	6.9000
D4 Mixed ABC	5-Digit	2	0.276	0.5520
D5 Mixed ABC	Firm	3	0.179	0.5370
D6 ABC	ABC	3	0.111	0.3339
D7 ABC	3-DigitSCF	15	0.103	2.2485
D11 SCF/5-Digit	3-DigitSCF	50	0.125	6.2500
D12 SCF/5-Digit	5-Digit	417	0.145	60.4650
D13 SCF/5-Digit	Carrier Route	1255	0.278	348.8900
D14 SCF/5-Digit	Firm	204	0.137	27.9480
D15 5-Digit	5-Digit	28	0.140	3.9200
D16 5-Digit	Carrier Route	12	0.147	1.7640
D17 5-Digit	Firm	2	0.150	0.3000
D18	Total Bundles (All Lines D1 through D17)	2075	0.077	\$ 470.5530

Part E: Sack/Tray Price

Container Level	Entry	Sacks/Trays	Price	Postage
E1 Mixed ABC Sack/Tray	Origin ABC	13	0.420	5.4600
E2 Mixed ABC Sack/Tray	Origin SCF	5	0.430	2.1500
E5 ABC Sack/Tray	Origin ABC	6	2.010	12.0600
E6 ABC Sack/Tray	Destination ABC	1	0.800	0.8000
E11 3-DigitSCF Sack/Tray	Origin ABC	15	2.100	31.5000
E15 3-DigitSCF Sack/Tray	Destination ABC	13	1.200	15.6000
E18 5-DigitSCF Sack/Tray	Destination SCF	12	0.800	9.6000
E19 5-DigitCarrier Route Sack/Tray	Origin ABC	3	2.700	8.1000
E22 5-DigitCarrier Route Sack/Tray	Destination ABC	8	1.300	10.4000
E23 5-DigitCarrier Route Sack/Tray	Destination SCF	21	1.300	27.3000
E25	Total Sacks/Trays (All Lines E1 through E24)	98		\$ 128.2200

Part E: Pallet Price

Container Level	Entry	Pallets	Price	Postage
E38 3-DigitSCF Pallet	Destination SCF	7	11.100	77.7000
E47	Total Pallets (All Lines E38 through E46)	7		\$ 177.3000
	Total Part E: Sack, Tray and Pallet Price Postage			\$ 205.9200
	Total Outside County Postage			\$ 7,019.90
	Total Postage			\$ 7,919.90

For the containers, round off difference between the appointment calculation and the total calculation to 0.0000%.

For the bundles, round off difference between the appointment calculation and the total calculation to 0.0000%.

USPS Use Only

Verification	Request Source	Performance Status	Disposition	Performance Type	Performance Percentage	Additional Postage	Cost Avoidance
eMR Currency review	Not Performed	N/A			N/A		
Bundle Preparation	Verification not requested by system	Not Performed	N/A			N/A	
MERLIN	Verification not requested by system	Not Performed	N/A			N/A	
						Total: \$0.00	\$0.00

This mailing has been inspected concerning:

- (1) eligibility for postage price claims,
- (2) proper preparation (and presort where required),
- (3) proper completion of postage statement, and
- (4) payment of annual fee (if required).

This postage statement was verified and accepted under the PostalOne! program. No postal signature or round stamp is required.

Total Postage: \$ 7,019.90
Additional Postage: \$0.00
Total Adjusted Postage: \$7,019.90

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Figure R-1: Verification Statement (PS For 3541) accessed from the Dashboard. See also Figure A-5.



Restricted Information

[Dashboard](#) > [Postage Statement](#) > [Periodicals Postage Statement Register - Summary](#)

Today's Date: 06/28/2009

Periodicals Postage Statement Register - Summary

[Download](#)

Mailing Group Summary Information

Title:	CRIMINAL NEWS WEEKLY BULLETIN	USPS Publication Number:	0000
Issue Date:	06/29/2009	Issue Number:	25
Vol. Number:	24	Contact Name:	ANTHONY J. PERICOLI
Job Name:	CRIMINAL NEWS WEEKLY BULLETIN	Contact Phone No.:	(212) 264-1870
Job ID:	3574220	Contact Email:	
Postage Statement Stage:	FIN		
Acceptance Office:	EAST GREENVILLE PA 18041-9998		

[View Version Summary](#)

[View Listing By Mailing Date](#)

Entry Facility	Container Count	Container Type				Mailing Date	Total Copies	Total Pieces	Total Pounds	Total Postage
		Pallets	Trays	Sacks	Other					
ADC 07099	3	2	0	1	0	06/27/2009	5190	5155	1396	1,449.47
ADC 100	20	13	0	7	0	06/27/2009	20000	18735	8502	6,120.08
ADC 100	85	6	0	79	0	06/27/2009	13437	13069	3615	3,291.03
ADC 100	101	7	0	94	0	06/27/2009	15074	15012	4056	4,039.87
Grand Total:	212	30	0	182	0		53701	51971	17569	\$14900.45

[Entry Facility Detail](#)

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Figure R-2: Postage Statement Register – Summary, accessed from the Verification Statement



Restricted Information

[Dashboard](#) > [Postage Statement](#) > [Periodicals Postage Statement Register - Summary](#) > [Entry Facility Detail](#)

Today's Date: 06/29/2009

Entry Facility Detail

[Download](#)

Mailing Group Summary Information

Title:	XXXXXXXXXXXXXXXXXXXX	USPS Publication Number:	200
Issue Date:	06/29/2009	Issue Number:	25
Volume Number:	24		
Job Name:	XXXXXXXXXXXXXXXXXXXX	Contact Name:	XXXXXXXXXXXXXXXXXXXX
Job ID:	3574220	Contact Phone Number:	(XXXXXXXX) XXXXXXX
Postage Statement Stage:	FIN	Contact Email:	
Finance Number:	412248	Acceptance Office:	EAST GREENVILLE PA 18041-9998

ADC 07099

Document Number	Mailing Date	Sequence Number	MPU ID	MPU Name	Weight Version ID	Version Weight	Ad %	Total Copies	Total Pieces	Total Weight	Total Postage
71415741	06/27/2009	0000000001.00001	00001		1	0.26910	47.7%	2191	2156	589	609.14
71415743	06/27/2009	0000000002.00002	00002		2	0.26910	47.7%	2999	2999	807	840.33
Grand Total:								5190	5155	1396	\$1449.47

ADC 100

Document Number	Mailing Date	Sequence Number	MPU ID	MPU Name	Weight Version ID	Version Weight	Ad %	Total Copies	Total Pieces	Total Weight	Total Postage
71415744	06/27/2009	0000000002.00003	00002		2	0.26910	47.7%	15074	15012	4056	4039.87
71415742	06/27/2009	0000000001.00004	00001		1	0.26910	47.7%	13437	13069	3615	3291.03
71415745	06/27/2009	0000000003.00005	00003		3	0.29240	65.2%	20000	18735	8502	6120.08
Grand Total:								48511	46816	16173	\$13450.98

MPU ID	MPU Name	MPU Description
00001	1	Version 0001
00002	2	Version 0002
00003	3	Version 0003

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Figure R-3 Postage Statement-Entry Facility Detail, accessed from Postage Statement Register - Summary

2.6 Screen Flow 7: Issue Level Postage Statement

- ☛ The Issue level postage statement totals the issue level postage for all Periodicals postage statements submitted via the acceptance office entry, Postal Wizard entry or Mail.dat entry.
- ☛ The Publisher has access to the issue level postage statement. The Preparer has access to the issue level postage statement only for their authorized acceptance offices.

To access the Issue Level Postage Statement, first elect Mailing Reports, Issue Level Postage Statement, select Mailing Reports from the Manage Mailing Activity (Figure I-1).

- ✓ Select the Issue Level Postage Statement from the Mailing Reports menu.
- ✓ The Permit Search Results screen appears, showing a list of Permit/Pub No.
- ✓ Select the Permit/Pub No. link, the Postage Statement - Permit Search page appears (Figure I-2).
- ✓ Enter the issue date, issue number and optional volume number to display the Issue Level Postage Statement (Figure I-3).
- ✓ From the Issue Level Postage Statement page, select the Register link located at the top right of the page (Figure I-4).
- ✓ The Periodicals Issue Level Register appears, select the View Version Summary link located at the top left of the Periodicals Issue Level Register page (Figure I-5). Only Mail.dat submissions display on the Register.
- ✓ The Version Summary page appears (Figure I-6). Only Mail.dat submissions display on the Version Summary.

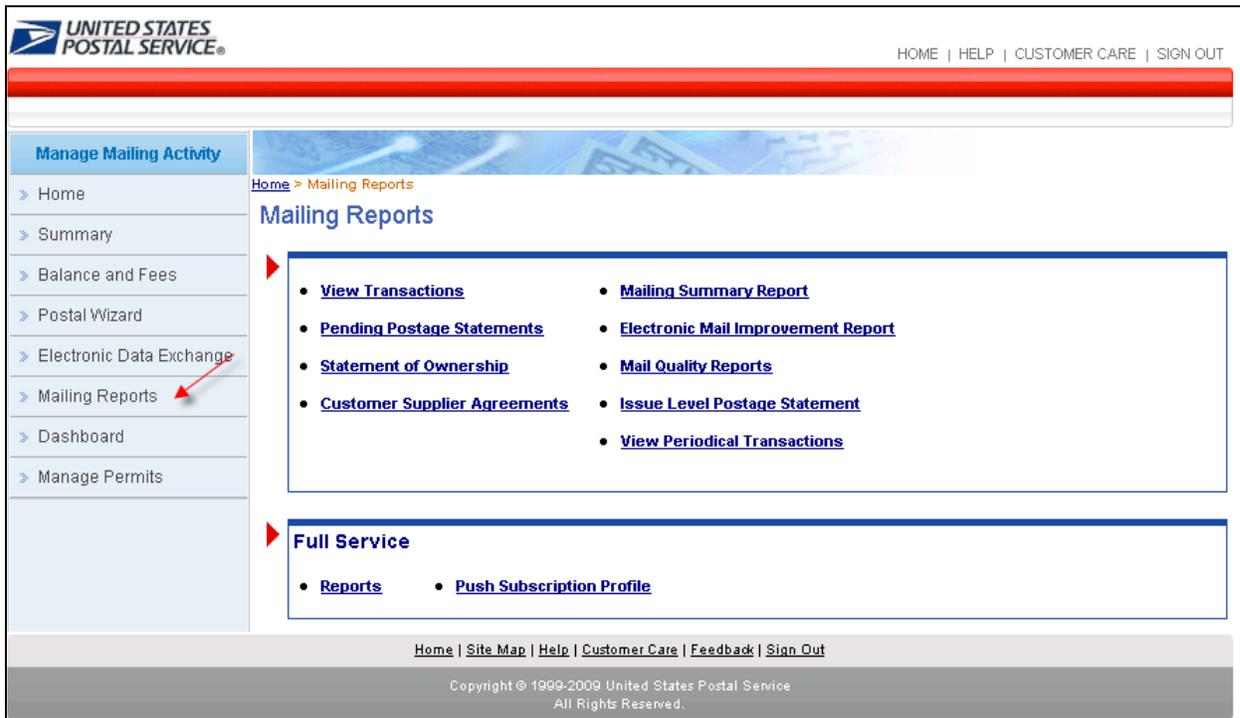


Figure I-1: Issue Level Postage Statement, accessed from the Manage Mailing Activity menu

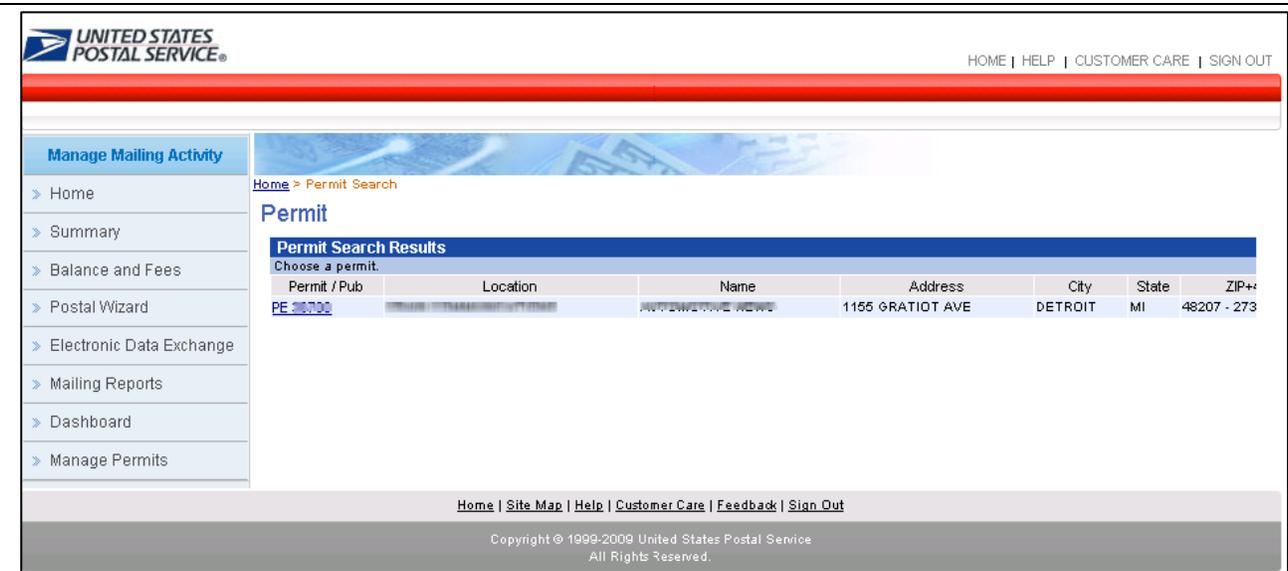


Figure I-2: Issue Level Postage Statement, accessed from the Manage Mailing Activity menu. Upon selecting the Permit number, the postage statement search criteria page displays.

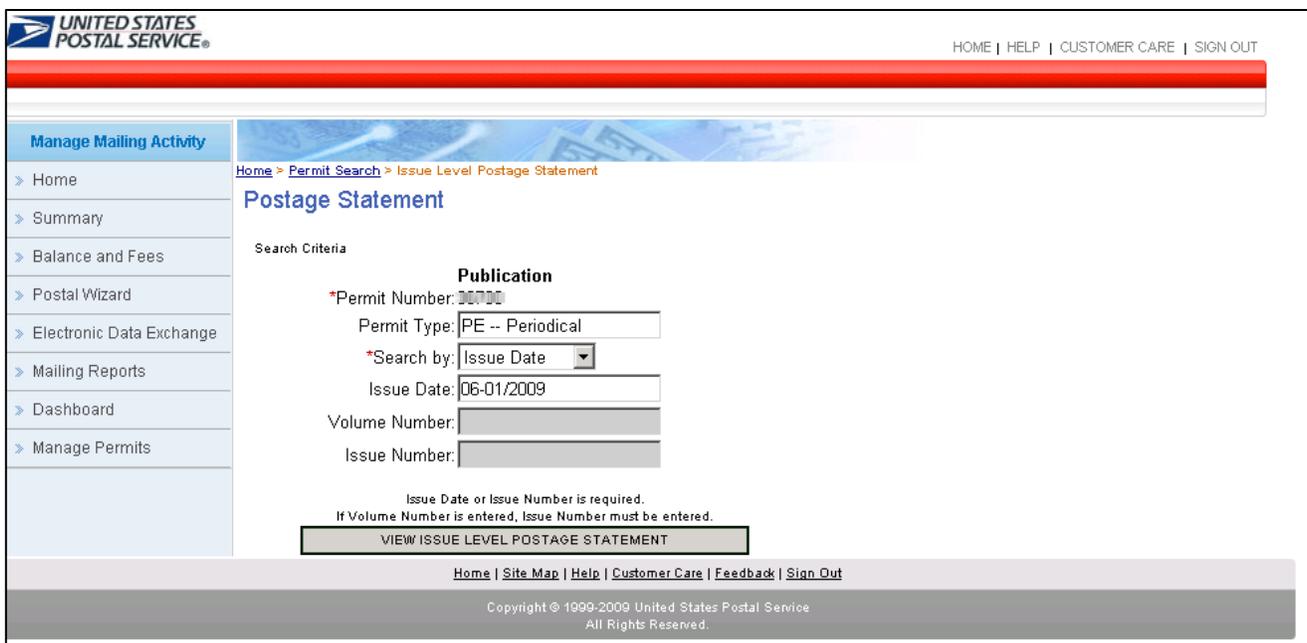


Figure I-3: Postage Statement Search for accessing the Issue Level view

You will be required to enter either the issue date or issue number and volume number (optional) to display the postage statements issue level, then click the View Issue Level Postage Statement link (Figure I-3) The matching issue level postage statements displays (Figure I-4)

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Redacted Information

Dashboard > Issue Level Postage Statement (search) > Issue Level Postage Statement Today's Date: 05/28/2009

PS Form 3541 - Periodicals - Issue Level Register | Download

United States Postal Service Post Office: Note Mail Arrival Time

Periodicals - Issue Level Classroom
 Nonprofit
 Regular
 Science-of-Agriculture

Periodicals mailings of different copy weights must be reported on separate statements. Noncommingled nonsubscriber copies over the 10% limit are not available at Periodicals prices.

Mailer Information

Publication Title and Owner or News Agent's Name	Mailer's Name, Address, Telephone Number, and Email	Entry Post Office Name, State, and ZIP+4
		NEW YORK NY 10199

Caps Customer Ref. ID: AUTOMOTIVE NEWS 6/1/09 MAIN

Mailing Information

Publication No.:	Edition/Code:	Process Category: Flats	Mailing Date: 05/01/2009	Statement Sequence No.: 1
Issue Date: 05/01/2009	Volume Number:	Issue Number:	Issue Frequency:	
Advertising Percentage in This Issue: 0.00 %		Weight per Copy for Issue: 0.0000 lbs.		
Total Addressed Pieces: 52218 pos.		Total Postage: \$ 17,197.32		
No of Containers:	1" MM Trays:	2" MM Trays:	2" EMM Trays:	Flat Trays:
				Sacks: 742.0000 Pallets: 108.0000 Other:

For Automation Price Pieces, Enter Date for Address Matching and Coding

For Carrier Route Price Pieces, Enter Date for Address Matching and Coding

For Carrier Route Price Pieces, Enter Date of Carrier Route Sequencing

Outside-County

Part B - Advertising Pound Prices

Entry Zone	Subscriber Copies	Nonsubscriber Copies	Total Copies	Total Pounds	Advertising Pounds	Prices	Postage	
B2 DSCF	15278	102	15380	3328	1618	0.208	323.6000	
B3 DADC	9201	39	9240	1999	972	0.212	206.0640	
B4 1 & 2	14204	46	14250	3009	1509	0.237	357.6300	
B5 3	7468	28	7494	1620	789	0.259	204.0200	
B6 4	4618	9	4627	1003	489	0.317	155.0130	
B7 5	1333	3	1336	289	141	0.804	56.9640	
B8 6	805	2	807	174	85	0.286	42.1800	
B9 7	159	0	159	34	17	0.687	10.3190	
B10 8	128	0	128	28	14	0.701	9.8140	
B11	Subtotal (Add lines B1 through B10)							\$ 1,365.6590

Part B - Nonadvertising Pound Prices

Entry Zone	Total Pounds	Advertising Pounds	Nonadvertising Pounds	Prices	Postage	
B13 DSCF	3328	1618	1710	0.166	293.8600	
B14 DADC	1999	972	1027	0.176	180.7520	
B15 All Others	6237	3043	3194	0.197	620.2180	
B16	Subtotal (Add lines B12 through B15)					\$ 1,093.8300
B17	Pound Rate Postage Total (B11 plus B16)					\$ 2,459.4890

Part C - Piece Prices

Level	Description	Copies	Addressed Pcs.	Prices	Postage	
Machinable Flats						
C1 Mixed ADC	Barcoded	141	141	0.403	56.9220	
C2 Mixed ADC	Nonbarcoded	80	80	0.435	34.8000	
C3 ADC	Barcoded	342	342	0.377	128.9340	
C4 ADC	Nonbarcoded	12	12	0.409	4.8900	
C5 3-Digit	Barcoded	17050	17050	0.362	6,172.1000	
C6 3-Digit	Nonbarcoded	156	156	0.383	59.7480	
C7 5-Digit	Barcoded	29362	29362	0.276	8,103.9120	
C8 5-Digit	Nonbarcoded	219	219	0.286	62.6340	
Carrier Route & Firm Bundles						
C25 Basic		4729	4729	0.178	841.7620	
C28 Firm Bundle		1330	127	0.178	22.6060	
C29	Subtotal (Add lines C1 through C28)		53421	52218	0.00938	\$ 15,480.1190
C30 Nonadv. %						\$ 2,039.2200
C31	Total Part C - Total Piece Rate Postage					\$ 12,857.7940

Part D - Bundle Prices

Container Level	Bundle Level	Bundles	Prices	Postage	
D1 Mixed ADC	Mixed ADC	49,000	0.877	3,5420	
D2 Mixed ADC	ADC	1,000	0.201	0.2010	
D3 Mixed ADC	3-Digit/SCF	10,000	0.267	2.6700	
D4 Mixed ADC	5-Digit	10,000	0.276	2.7600	
D6 ADC	ADC	28,000	0.111	3.1080	
D7 ADC	3-Digit/SCF	449,000	0.183	82.1670	
D8 ADC	5-Digit	960,000	0.199	190.0200	
D9 ADC	Carrier Route	128,000	0.214	40.1920	
D10 ADC	Firm	39,000	0.148	5.8110	
D11 SCF/3-Digit	3-Digit/SCF	315,000	0.125	39.3750	
D12 SCF/5-Digit	5-Digit	1538,000	0.146	223.0180	
D13 SCF/5-Digit	Carrier Route	420,000	0.279	117.1800	
D14 SCF/5-Digit	Firm	88,000	0.137	12.0560	
D15 5-Digit	5-Digit	20,000	0.140	2.8000	
D16	Total Bundles (Add lines D1 through D17)		4072,000		\$ 728.8928

Part E - Sack/Tray Prices

Container Level	Entry	Sacks/Trays	Prices	Postage	
E1 Mixed ADC Sack/Tray	Origin ADC	27,000	0.428	11,3400	
E2 Mixed ADC Sack/Tray	Origin SCF	5,000	0.428	2.1400	
E3 Mixed ADC Sack/Tray	Origin Post Office/DMU	2,000	0.428	0.8400	
E4 ADC Sack/Tray	Origin BMC	5,000	0.819	10,0500	
E5 ADC Sack/Tray	Origin ADC	10,000	2.818	20,1000	
E9 ADC Sack/Tray	Destination ADC	4,000	0.889	3,2000	
E10 3-Digit/SCF Sack/Tray	Origin BMC	19,000	2.188	39,9000	
E11 3-Digit/SCF Sack/Tray	Origin ADC	51,000	2.188	107,1000	
E12 3-Digit/SCF Sack/Tray	Origin SCF	6,000	2.188	13,0500	
E13 3-Digit/SCF Sack/Tray	Destination ADC	24,000	1.208	28,8000	
E16 3-Digit/SCF Sack/Tray	Destination SCF	35,000	0.889	28,0000	
E17 5-Digit/Carrier Route Sack/Tray	Origin BMC	1,000	2.708	2,7000	
E18 5-Digit/Carrier Route Sack/Tray	Origin ADC	4,000	2.708	10,8000	
E22 5-Digit/Carrier Route Sack/Tray	Destination ADC	4,000	1.708	6,8000	
E23 5-Digit/Carrier Route Sack/Tray	Destination SCF	10,000	1.308	13,0000	
E25	Total Sacks/Trays (Add lines E1 through E24)		207,000		\$ 297.3398

Part E - Pallet Prices

Container Level	Entry	Pallets	Prices	Postage	
E26 ADC Pallet	Origin BMC	7,1584	28.808	200,4362	
E27 ADC Pallet	Origin ADC	6,0140	28.808	224,3620	
E28 ADC Pallet	Origin SCF	0,9946	28.808	27,8460	
E30 ADC Pallet	Destination BMC	0,8409	22.408	14,3562	
E31 ADC Pallet	Destination ADC	3,3728	12.408	41,8227	
E32 3-Digit/SCF Pallet	Origin BMC	1,3470	33.368	44,9399	
E33 3-Digit/SCF Pallet	Origin ADC	4,7477	33.368	158,3833	
E34 3-Digit/SCF Pallet	Origin SCF	0,2469	33.368	8,1999	
E37 3-Digit/SCF Pallet	Destination ADC	1,5188	28.708	31,4392	
E38 3-Digit/SCF Pallet	Destination SCF	6,0968	11.108	101,0078	
E47	Total Pallets (Add lines E26 through E46)		37,1307		\$ 852.8181
Total Part E - Sack, Tray and Pallet Rate Postage					\$ 1,158,1481
Total Outside-County Postage					\$ 17,197.32
Total Postage					\$ 17,197.32

This Issue Level Postage Statement includes Postage Statements from a Combined Mailing, the container count may not include all containers.

This document is not a financial document.

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Figure I-4: Issue Level Postage Statement

You are in the Test Environment for Mailers (TEM)

Restricted Information

[Reports](#) > [Issue Level Postage Statement Report\(search\)](#) > [Issue Level Postage Statement](#) > [Periodicals Issue Level Postage Statement](#)

Today's Date: 11/16/2009

Register

Information removed to protect customer privacy

Periodicals Issue Level Register

Mailing Group Summary Information

Title: [Redacted] Publication Number: [Redacted]
 Issue Date: [Redacted] Volume Number: [Redacted] Issue Number:

[View Version Summary](#)

Stage	Acceptance Office	Container Count	Container Type				Total Copies	Total Pieces	Total Pounds	Total Postage
			Pallets	Trays	Sacks	Other				
R	THOMASTON GA 30286-9998	1576	1061	0	515	0	376634	374329	137696	\$ 79,706.12
R	SARATOGA NEW YORK 12866-9998	662	617	0	45	0	305536	302460	111719	\$ 62,652.46
R	OKLAHOMA CITY OK 73125-9653	1686	1428	0	258	0	311474	309227	110472	\$ 67,031.78
Grand Total:		3924					993644	986016	359887	\$ 209,390.36

F=Finalized, R=Released

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Figure I-5: Issue Level Postage Statement, accessed from the Issue Level Postage Statement (link is located at the top right of the page). Only Mail.dat submissions generate Issue Level register data.

You are in the Test Environment for Mailers (TEM)

Restricted Information

[Reports](#) > [Issue Level Postage Statement Report\(search\)](#) > [Issue Level Postage Statement](#) > [Periodicals Issue Level Postage Statement](#)

Today's Date: 11/16/2009

Register > [Periodicals Issue Level Version Summary](#)

Information removed to protect customer privacy

Version Summary

Mailing Group Summary Information

Title: [Redacted] Publication Number: [Redacted]
 Issue Date: [Redacted] Volume Number: [Redacted] Issue Number:

Mail ID	Mail Name	Mailing Date	Piece Weight	Ad %	Copies	Pieces	Weight	Postage
00000	9030066	20091105	0.34230	45.61	5	5	2	1.02
00001	9030067	20091105	0.34230	45.61	17	17	5	3.2
00001	9033470	20091104	0.36550	45.71	15609	15482	5705	3373.01
00001	9033596	20091106	0.35450	45.71	7516	7495	2665	1786.82
00002	9030068	20091105	0.34230	45.61	30	30	12	6.2
00002	9033470	20091104	0.36550	45.71	56	55	24	18.86
00002	9033596	20091106	0.35450	45.71	19822	19648	7027	4046.41
00003	9030069	20091105	0.34230	45.61	2	2	1	.45
00003	9033470	20091104	0.36550	45.71	12634	12504	4618	2647.52
00003	9033596	20091106	0.35450	45.71	494	491	176	110.16
00004	9030070	20091105	0.34230	45.61	5	5	2	1.13
00004	9033470	20091104	0.36550	45.71	18999	18627	6908	3879.6
00004	9033596	20091106	0.35450	45.71	505	504	179	104.89
00005	9030071	20091105	0.34230	45.61	7	7	3	1.54
00005	9033470	20091104	0.36550	45.71	10143	10069	3707	2100.11
00005	9033596	20091106	0.35450	45.71	10037	11979	4267	2619.13
00006	9030072	20091105	0.34230	45.61	39	39	14	6.26
00006	9033470	20091104	0.36550	45.71	8429	8379	3061	1821.03
00006	9033596	20091106	0.35450	45.71	13993	13924	4952	3257.36

Figure I-6: Periodicals Issue Level Version Summary, accessed from the Issue Level Postage Statement (link is on the Register screen left justified under the Mailing Group Summary Information.) Only Mail.dat submissions generate Issue Level version summary data.

2.7 Screen Flow 8: Reviewing Periodical Transactions

- Note Once customers are ready to migrate to the production environment, they are advised to complete the required application CAPS forms downloadable from the CAPS Service Center Web site. When applications are approved and completed, customers get access to detailed account information from the CAPS Service Center Web site on the Account Inquiry page (refer to section 5 of this document). Customers are assigned a CAPS account number and password, and will have the ability to get account balances, transaction history, fee information, and other information. The information can be formatted as a report or downloaded to your system. This CAPS Account Inquiry functionality is not supported in the TEM environment. The following Periodical Transaction screens allow the (customer) verification and record keeping of CAPS transaction in the TEM environment.

Access to Periodical Transactions is through the Mailing Reports from the Mailing Reports from the Manage Mailing Activity menu. Through this feature, the system can perform a maximum search within a 125 day period unless a permit number is supplied. If a permit number is supplied, the maximum search is a 365 day stretch. Additionally, to view Periodical Transactions and CAPS transaction numbers follow the steps below.

- From the Manage Mailing Activity screen, select Mailing Reports then View Periodical Transactions (Figure PT-1). The system displays a list of the ten most recent transactions from the past 6 months on the Periodicals Transactions screen. They do not reflect the default "Start Date" and "End Date" range (Figure PT-2).
- Select any of the displayed (3541) Transaction Types (Figure PT-2). Or use the search options to narrow the results: Location, Issue Date, Customer Reference Number, Transaction Type, Issue Number, Account Type, Volume Number Permit/ Pub Number and by date range.
- Upon selecting a PS 3541 Transaction Type link. A Facsimile of Form 3541 displays.

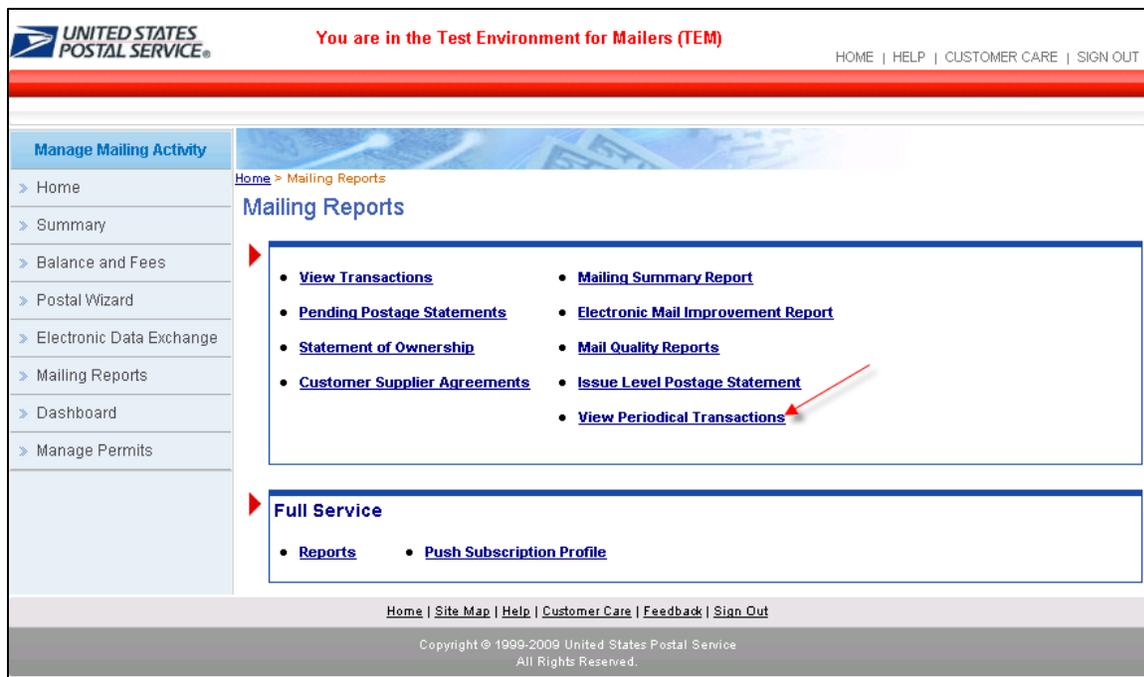


Figure PT-1: To view Periodical Transaction and CAPS transaction numbers, from the Manage Mailing Activity screen, select Mailing Reports then View Periodical Transactions. The system displays a list of the ten most recent transactions from the past 6 months on the Periodicals Transactions screen. They do not reflect the default "Start Date" and "End Date" range (Figure PT-2).

UNITED STATES POSTAL SERVICE® You are in the Test Environment for Mailers (TEM) HOME | HELP | CUSTOMER CARE | 3

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits

Home > Reports > View Periodical Transactions

Periodical Transactions

Maximum search is within a 125 day period unless a permit number is supplied. If a permit number is supplied, the maximum search is a 365 day period.

Search for Periodical Transactions

Location	Transaction Type	Account Type	Permit / Pub Num
<input type="text"/>	All	All	<input type="text"/>
Issue Date	Issue Number	Volume Number	
<input type="text"/> to <input type="text"/> MM/DD/YYYY	<input type="text"/>	<input type="text"/>	
Customer Reference Number	Start Date	End Date	
<input type="text"/>	06/05/2009	07/09/2009	

NOTE: These are the 10 most recent transactions from the past 6 months. They do not reflect the "Start Date" and "End Date" range.

Permit / Pub	Location	Date	Transaction Type	Postage Statement #	Customer Reference ID	Begin Balance	Amount	End Balance	Pieces	Verifications	Used
FE 30736 WI	PEWAUKEE	07/07/2009	3541	70085131	N/A	\$2,981,851.91	20,916.46	\$2,960,735.45	52691		TMF
FE 30736 WI	PEWAUKEE	07/07/2009	3541	70085130	N/A	\$2,960,735.45	14,401.47	\$2,946,333.98	45705		TMF
FE 3080 WI	PEWAUKEE	07/07/2009	3541	70085132	N/A	\$2,992,593.05	10,941.14	\$2,981,651.91	33683		TMF
FE 3080 WI	PEWAUKEE	07/07/2009	3541	70084919	N/A	\$3,003,636.64	11,043.59	\$2,992,593.05	33683		TMF
FE 30736 WI	PEWAUKEE	07/03/2009	3541	70084021	N/A	\$3,018,818.45	15,181.81	\$3,003,636.64	45851		TMF
FE 3080 WI	PEWAUKEE	07/03/2009	3541	70084020	N/A	\$3,050,676.58	10,936.47	\$3,039,740.11	33683		TMF
FE 30736 WI	PEWAUKEE	07/03/2009	3541	70084019	N/A	\$3,039,740.11	20,921.66	\$3,018,818.45	52691		TMF
FE 30736 WI	PEWAUKEE	07/03/2009	3541	70084018	N/A	\$3,065,609.36	14,932.78	\$3,050,676.58	45851		TMF
FE 30736 WI	PEWAUKEE	07/03/2009	3541	70084016	N/A	\$3,086,204.53	20,595.17	\$3,065,609.36	52691		TMF
FE 3080 WI	PEWAUKEE	07/03/2009	3541	70084017	N/A	\$3,096,961.24	10,756.71	\$3,086,204.53	33683		TMF

Home | Site Map | Help | Customer Care | Feedback | Sign Out

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Figure PT-2: To view a Postage Statement and the associated CAPS transaction number, select any (3541) Transaction Type. The user also has the option to use any of the search criteria to narrow the results: Location, Issue Date, Customer Reference Number, Transaction Type, Issue Number, Account Type, Volume Number Permit/ Pub Number and by date range.

Facsimile of Form 3541

PS Form 3541 - Periodicals - Combined Mailing **Final**

United States Postal Service Classroom **Post Office: Note Mail Arrival Time**
Periodicals - Combined Mailing Nonprofit
 Regular
 Science-of-Agriculture

Periodicals mailings of different copy weights must be reported on separate statements.
 Noncommingled nonsubscriber copies over the 10% limit are not mailable at Periodicals prices.

Mailer Information

Publication Title and Owner or News Agent's Name [Faded text]	Mailer's Name, Address, Telephone Number, and Email [Faded text]	Entry Post Office Name, State, and ZIP+4 PEWAUKEE WI 53072
Caps Customer Ref. ID: (CPP)		
Caps Transaction Number: 2009070700000800M1		

Mailing Information

Publication No. [Faded]	Edition/Code: 5	Process Category: Flats	Mailing Date: From 11/01/2009 to 11/01/2009	Statement Sequence No.: First: Last:
Issue Date: First: 06/01/2009 Last: 06/01/2009	Volume Number: 94	Issue Number: 06	Issue Frequency: 1/year	
Weight of Single Ride-Along Piece: N/A	Weight per Copy for Issue: N/A	Advertising Percentage in This Issue: N/A		
Total Addressed Pieces: 46705 pcs.		Total Adjusted Postage: \$ 14,401.47		
No of Containers:	1' MM Trays: 2' MM Trays: 2' EMM Trays: Flat Trays:	Sacks: 1006	Pallets: 56	Other:
For Automation Price Pieces, Enter Date for Address Matching and Coding 01/01/0001	For Carrier Route Price Pieces, Enter Date for Address Matching and Coding 01/01/0001	For Carrier Route Price Pieces, Enter Date of Carrier Route Sequencing 01/01/0001		
Combined Mailing <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				
Comments:		CAPS Transaction number: 2009070700000800M1		

Outside-County

Part B - Advertising Pound Price

Entry Zone	Subscriber Copies	Nonsubscriber Copies	Total Copies	Total Pounds	Advertising Pounds	Price	Postage
B2 DSCF	17515	3331	20846	3584	1972	0.200	394.4000
B3 DADC	4385	529	4914	848	468	0.212	99.2160
B4 1 & 2	9905	1243	11148	1919	1056	0.237	250.2720

Figure PT-3: Upon selecting a PS 3541 Transaction Type link. A Facsimile of the Form 3541 displays, the CAPS transaction number are highlighted in red. See also figure PT-4.

Consolidated Payment Request - Summary Receipt

PE						Payment Date: 11/16/2009		
Issue Date	Vol. No.	Issue No.				Payment Amount	Reversal Amount	Total
<input checked="" type="checkbox"/> 11/16/2009							(\$0.00)	
<input checked="" type="checkbox"/> MERCED CA 95340-9998								
	Document No.	Job ID	Provider Code	Transaction Number	CAPS Transaction Number	Postage Amount		
	PS 77176578	00009140	QW00	200932100523842M1	2009111700523900M1			
<input checked="" type="checkbox"/> TORRANCE CA 90503-7238								
	Document No.	Job ID	Provider Code	Transaction Number	CAPS Transaction Number	Postage Amount		
	PS 77146805	934462	RRDT	200932100524043M1	2009111700524100M1			

PT-4: Consolidated Payment Summary Receipt

After the payment request is paid in the CAPS system, each item in a payment request is assigned a unique *PostalOne!* System transaction number and a unique CAPS transaction number. The payment request feature moved the payments to the same payment date 11/17/09 shortly after midnight central time on the date of payment. For this case the payment date was 11/16/09, the Julian date 321 in the *PostalOne!* transaction number corresponds to the 11/17/09 date in the CAPS transaction number. (Note in this figure, the total payment amount and customer ID information were removed to protect customer information.)

Upon displaying the postage statement we find the time processed to FIN status: **PS # 77176578, FIN - Transaction # 200932100523842M1** (processed by {Clerk's Initials} on 11/17/2009 12:52:38 AM). There is no longer a record of when the postage statement entered the FPP status.

Section 4: Reports

Reports and the Data Elements

This section describes the reports generated by *PostalOne!* system for Periodicals mailings.

4.1 Qualification Report

The USPS Qualification Report enables acceptance employees to verify the accuracy of the presort makeup of the mailing during the In-Depth Verification process. The report provides information on preparation method, price levels, and content of the mailing; and Volume and postage data. You can also access the Container search function and Version Summary Report from this page (Figure Q-1).

Restricted Information

Dashboard > Qualification Report

Today's Date: 06/20/2009

USPS Qualification Report

Mailing Group Summary Information			
Mailer's Job #:	06204803	Open Date:	06-19-2009
Mail Group ID:		Finance Number:	566400
Preparer:		Description:	20090808
Qualification Report Summary Information			
Post Office of Mailing:	PEWAUKEE, WI 53072-9998	Software:	Prepare Date: 06-09-2009
Mail Class:	Periodicals	Processing Category:	Flats
ZAP Option:	1	Zone Matrix Date:	
Full Service:	Mixed	Submit Date:	06-19-2009

Container Search | Version Summary Information

Search by: Starts with:

#	Size	Type	Over/flow	Level	Chargeable	ZIP	Group Dest	Full Service	Rate/Pieces											Totals					
									CR	5B	3B	AB	M8	5D	3D	A0	MD	FB	Unknown	Total Copies	Zone	Running Total			
000439	S			CRD	1	95054	C015		24														24	SCF	24
000325	S			CR5S	1	01701	B099		8														8	SCF	30
							C023		8														8	SCF	38
							C052		19														19	SCF	57
							C098		6														6	SCF	63
000320	S			CR5	1	01752	C027		11														11	SCF	74
							C028		13														13	SCF	87
000333	S			CR5	1	01803	C002		8														8	SCF	95
							C013		7														7	SCF	102
							C015		7														7	SCF	109
							C022		9														9	SCF	465
000505	S			CR5	1	94085	C016		12														12	SCF	477
							C040		11														11	SCF	488
							C060		11														11	SCF	499
							C072		11														11	SCF	510

Pages: First Page 1 2 3 4 5 6 7 8 9 10 Next set of Pages Last Page (19)

- * - Piece Count to AADC/ADC for MAAD Tray exceeds 149.
- † Piece Count to AADC/ADC for MADC Tray exceeds 89.
- ‡ Piece Count to ADC/5DG/5DGS/3DG/3DGS for Tray ZIP Destination is less than 90.
- § - Piece Count to AADC/5DG/5DGS/3DG/3DGS for Tray ZIP Destination is less than 150.
- @ - Piece Count to 3DG for AADC Letter Tray exceeds 149 or ADC Flat Tray exceeds 89.

Rate Level Summary Information*	
Carrier Route Basic	13,280
Auto 5-Digit	71,639
Auto 3-Digit	43,342
Auto ADC/AADC	2,034
Auto Mixed ADC/AADC	569
Presort 5-Digit	520
Presort 3-Digit	395
ADC Presort	28
Mixed ADC Presort	4
Firm Bundle	4,582
Total	136,373

* - Rate Level Summary is for the entire Qualification Report.

Rate Level Detail Information*	
Basic/Postnet Carrier Route Basic	13,280
Auto Basic/Postnet 5-Digit	71,639
Auto Basic/Postnet 3-Digit	43,342
Auto Basic/Postnet ADC/AADC	2,034
Auto Basic/Postnet Mixed ADC/AADC	569
Basic/Postnet Presort 5-Digit	520
Basic/Postnet Presort 3-Digit	395
Basic/Postnet ADC Presort	28
Basic/Postnet Mixed ADC Presort	4
Basic/Postnet Firm Bundle	4,582
Full Service Carrier Route Basic	0
Auto Full Service 5-Digit	0
Auto Full Service 3-Digit	0
Auto Full Service ADC/AADC	0
Auto Full Service Mixed ADC/AADC	0
Full Service Presort 5-Digit	0
Full Service Presort 3-Digit	0
Full Service ADC Presort	0
Full Service Mixed ADC Presort	0
Full Service Firm Bundle	0
Total	136,373

* - Rate Level Detail is for the entire Qualification Report.

Domestic Zone Summary Information*	
Outside-County, DSCF	61,272
Outside-County, DADC	18,020
Zones 1 and 2	24,203
Zone 3	16,025
Zone 4	11,788
Zone 5	2,443
Zone 6	1,875
Zone 7	381
Zone 8	366
Total	136,373

* - Domestic Zone Summary is for the entire Qualification Report.

Figure Q-1: Qualification Report, accessed from the Job Detail page

4.2 Postage Statement Register

There is a Periodicals register for each postage statement submitted at the business mail acceptance office. This register organizes postage information about the versions or editions and what entry facilities they were dropped at; options include an ADC, an SCF, a BMC or the delivery unit. The register shows for each entry facility and edition code, the number and type of containers, the mailing date, the copies, pieces, pounds and postage (Figure P-1).

To access the register, you must first select the postage statement then click the link "Register". The postage statement register can be downloaded in PDF (.pdf), Excel (.xls) or CSV (.csv) formats.


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Dashboard > Postage Statement > Periodicals Postage Statement Register - Summary
Today's Date: 06/28/2009

Periodicals Postage Statement Register - Summary

Download

Mailing Group Summary Information

Title: <small>USPS NEWS FROM BUSINESS</small>	USPS Publication Number: 000
Issue Date: 06/29/2009	Issue Number: 25
Vol. Number: 24	
Job Name: <small>USPS NEWS FROM BUSINESS</small>	Contact Name: <small>USPS NEWS FROM BUSINESS</small>
Job ID: 3574220	Contact Phone No.: <small>(215)986-6876</small>
Postage Statement Stage: FIN	Contact Email:
Acceptance Office: EAST GREENVILLE PA 18041-9998	

[View Version Summary](#)
[View Listing By Mailing Date](#)

Entry Facility	Container Count	Container Type				Mailing Date	Total Copies	Total Pieces	Total Pounds	Total Postage
		Pallets	Trays	Sacks	Other					
ADC 07099	3	2	0	1	0	06/27/2009	5190	5155	1396	1,449.47
ADC 100	20	13	0	7	0	06/27/2009	20000	18735	8502	6,120.08
ADC 100	85	6	0	79	0	06/27/2009	13437	13069	3615	3,291.03
ADC 100	101	7	0	94	0	06/27/2009	15074	15012	4056	4,039.87
Grand Total:	212	30	0	182	0		53701	51971	17569	\$14900.45

Entry Facility Detail

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Figure P-1: Postage Statement Register

4.2.1 Postage Statement Register – Entry Facility Detail

The header is the same as the Postage Statement Register but includes sub-headers for each entry facility. The Entry Facility Details page links to child postage statements within the consolidated statement instead of linking to qualification reports.

Each child postage statement is a statement of the postage at the entry facility and the edition or version. The postage on these statements is added up to provide the postage on the consolidated postage statement at the acceptance office (select a Document Number link on left Figure P-2). The parent postage statement at the acceptance office is called the billable postage statement and causes the debit on the account.

The user has the option to select from three alternate views: by Entry Facility, Edition or version, and Mailing Date.

To access the Postage Statement Register – Entry Facility Detail, refer to the Screen Flow 4. The child postage statements are accessible from the new Document Number links. This page is accessible from the Register or from the Listing by Mailing Date. The Postage Statement Register Entry Facility Detail can be downloaded in PDF (.pdf), Excel (.xls) or CSV (.csv) formats.


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Restricted Information

Dashboard > Postage Statement > Periodicals Postage Statement Register - Summary > Entry Facility Detail
Today's Date: 06/28/2009

Entry Facility Detail

Download

Mailing Group Summary Information

Title: <small>PERIODICALS REGISTRATION</small>	USPS Publication Number: 256
Issue Date: 06/29/2009	Issue Number: 25
Volume Number: 24	
Job Name: <small>PERIODICALS REGISTRATION</small>	Contact Name: <small>PERIODICALS REGISTRATION</small>
Job ID: 3574220	Contact Phone Number: <small>215398-4075</small>
Postage Statement Stage: FIN	Contact Email:
Finance Number: 412248	Acceptance Office: EAST GREENVILLE PA 18041-9998

ADC 07099

Document Number	Mailing Date	Sequence Number	MPU ID	MPU Name	Weight Version ID	Version Weight	Ad %	Total Copies	Total Pieces	Total Weight	Total Postage
71415741	06/27/2009	0000000001.00001	00001		1	0.26910	47.7%	2191	2156	589	609.14
71415743	06/27/2009	0000000002.00002	00002		2	0.26910	47.7%	2999	2999	807	840.33
Grand Total:								5190	5155	1396	\$1449.47

ADC 100

Document Number	Mailing Date	Sequence Number	MPU ID	MPU Name	Weight Version ID	Version Weight	Ad %	Total Copies	Total Pieces	Total Weight	Total Postage
71415744	06/27/2009	0000000002.00003	00002		2	0.26910	47.7%	15074	15012	4056	4039.87
71415742	06/27/2009	0000000001.00004	00001		1	0.26910	47.7%	13437	13069	3615	3291.03
71415746	06/27/2009	0000000003.00005	00003		3	0.29240	65.2%	20000	18735	8502	6120.08
Grand Total:								48511	46816	16173	\$13450.98

MPU ID	MPU Name	MPU Description
00001	1	Version 0001
00002	2	Version 0002
00003	3	Version 0003

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Figure P-2: Entry Facility Detail, accessed from the Postage Statement Register

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Restricted Information

[Dashboard](#) > [Postage Statement](#) > [Periodicals Postage Statement Register - Summary](#) > [Entry Facility Detail](#) > [Version Summary](#) >

Today's Date: 06/28/2009

[Listing By Mailing Date](#)

Listing by Mailing Date

[Download](#)

Mailing Group Summary Information

Title:	CRAINS NEW YORK BUSINESS	USPS Publication Number:	209
Issue Date:	06/29/2009	Issue Number:	25
Volume Number:	24	Contact Name:	MICHELE HECHLER
Job Name:	Crains NYB 06/29/09	Contact Phone Number:	(313)446-1674
Job ID:	3574220	Contact Email:	
Postage Statement Stage:	FIN	Acceptance Office:	EAST GREENVILLE PA 18041-9998
Finance Number:	412248		

Mailing Date 06/27/2009

Entry Facility	Entry Level	Container Count	Pallets	Trays	Sacks	Other	Copies	Pieces	Weight	Postage
ADC 07099	ADC	3	2	0	1	0	5190	5155	1396	1449.47
ADC 100	ADC	20	13	0	7	0	20000	18735	8502	6120.08
ADC 100	ADC	85	6	0	79	0	13437	13069	3615	3291.03
ADC 100	ADC	101	7	0	94	0	15074	15012	4056	4039.87
Totals:		209					53701	51971	17569	\$14900.45

Total for Entire Mailing

Container Count	Copies	Pieces	Weight	Postage
212	53701	51971	17569	\$14900.45

Entry Facility By Mailing Date

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Figure P-4 Version Summary Listing by Mailing date view, accessible from Postage Statement Register (Figure P-1)

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Today's Date: 06/28/2009

[Dashboard](#) > [Postage Statement](#) > [Display Piece-Weight Information](#)

Version Summary Report

Mailing Group Summary Information

Mailer's Job #:	3574220	Open Date:	06-24-2009	Finance Number:	412248
Mail Group ID:	70324940	Description:	Crains NYB 06/29/09		
Preparer:	80000-GH-BROWN PRINTING				

Postage Statement Information

Postage Statement ID:	71415741	Permit Holder:	000000
Mail Class:	Periodical	Stage:	CON
Total Pieces:	2156	Total Weight:	589
		Processing Category:	Flats
		Total Postage:	609.14

Version ID	Version Name	Description	Copies	Pieces	Advertising Percentage	Weight
00001	1	Version 0001	2,191	2,156		47.70 .2691

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P-5: Version Summary Piece-Weight Information page, accessible from Postage Statement Register > P-3 Version Summary Edition view (Figure P-3)

4.3 Version Summary Report

The Version Summary Report displays a postage statement at a single acceptance office. The columns are the MPU ID, the MPU Name, the Mailing Date, the Weight Version ID, the piece weight, the Advertising Percentage, the copies, the pieces the total weight and the postage (Figure V-1).

The Version Summary enables acceptance employees to view the price qualifications for a mail piece version. This report displays the piece weight and advertising percentage for each version of the mailpiece submitted. The weight and advertising percentage must be confirmed on the postage statement prior to finalization.

The Version Summary Report contains the following information:

- *Version ID* — The number assigned to a particular version.
- *Version Name* — The name (alpha or numeric) assigned to a particular version by the mail.
- *Description* — The description of a particular version.
- *Weight* — The declared weight of a particular mail piece as stated by the mail owner/mail preparer.
- *Advertising Percentage* — The declared percentage of advertising included in a particular version as stated by the mailer. The “Advertising Percentage” field displays
- *Price Level* — Postage price applicable to a particular version.
- *Number of Copies* — The number of mail pieces in a particular version, as reported by the mailer.

The Version Summary is accessible from the new Postage Statement Register, under the header information, there are links to the Version summary and the Listing by Mailing Date (refer to Figure P-1). First display the postage statement, and then click the link “Version Summary.” The header is the same as the Postage Statement Register header. The Version Summary Report can be downloaded in PDF (.pdf), Excel (.xls) or CSV (.csv) formats. The link at the top right of screen provides a download of the information in pdf, excel or csv.



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Version Summary

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Mailing Group Summary Information

Title:	CRAINS NEW YORK BUSINESS	USPS Publication Number:	209
Issue Date:	06/29/2009	Issue Number:	25
Volume Number:	24	Contact Name:	MICHELE HECHLER
Job Name:	Crains NYB 06/29/09	Contact Phone Number:	(313)448-1674
Job ID:	3574220	Contact Email:	
Postage Statement Stage:	FIN	Acceptance Office:	EAST GREENVILLE PA 18041-9998
Finance Number:	412248		

MPU ID	MPU Name	Mailing Date	Weight Version ID	Piece Weight	Ad %	Copies	Pieces	Weight	Postage
00001	1	06/27/2009		0.26910	47.7%	2191	2156	589	\$ 609.14
00001	1	06/27/2009		0.26910	47.7%	13437	13069	3615	\$ 3,291.03
Total for MPU ID 00001:						15628	15225	4204	\$ 3,900.17
00002	2	06/27/2009		0.26910	47.7%	15074	15012	4056	\$ 4,039.87
00002	2	06/27/2009		0.26910	47.7%	2999	2999	807	\$ 840.33
Total for MPU ID 00002:						18073	18011	4863	\$ 4,880.20
00003	3	06/27/2009		0.29240	65.2%	20000	18735	8502	\$ 6,120.08
Total for MPU ID 00003:						20000	18735	8502	\$ 6,120.08

MPU ID	MPU Name	MPU Description
00001	1	Version 0001
00002	2	Version 0002
00003	3	Version 0003

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Figure V-1: Version Summary Report

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Dashboard > Postage Statement > Advertising Percentage Worksheet Today's Date: 06/17/2009

Mailing Group Summary Information			
Title:	AUTOMOTIVE NEWS	USPS Publication No.:	38700
Issue Date:	06/01/2009		
Vol. No.:	83	Issue No.:	23
Job Name:	20090608	Contact Name:	JIM CANTLEY
Job ID:	CRAID009	Contact Phone No.:	(313)446-1615
Postage Statement Stage:	UPD	Contact Email:	joantley@erain.com
Acceptance Office:	PEWAUKEE, WI 53072-9998		

Accept all advertising percentages as final [MPU View](#)

Component Advertising Percentage Worksheet				
Component ID	Component Description	Component Estimated Ad%	Component Final Ad%	Component Ad% Difference
00000001	AN0002	55.00	55.00	0.00
00000002	AN0010	55.00	55.00	0.00
00000003	AN0011	55.00	55.00	0.00

Abandon
Submit >
< Back

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Figure A-1: Advertising Percentage Worksheet used by Mail Owner or DMU/BMEU Clerk

4.4 Advertising % (Ad%) Worksheet

The advertising percentage worksheet is available for the PS Form 3541 Postage Statement – Periodicals after the Mail.dat file is sent with Container Summary field Container Status with value ready-to-pay. This worksheet is available on a hyperlink within the postage statement displayed on the dashboard. For Mail.dat,, the worksheet may be updated with the advertising percentage per CPT by the postal clerk at the acceptance unit, or by the publisher or by the mailer, and is available for display by the publisher or mailer. The edition advertising percentage used to calculate postage is also displayed on the advertising percentage worksheet.

Note that a Mail.dat .csm Container Status ready-to-pay file cannot contain any information that will be reported on postage statements entered manually by the CPP unit at the PCSC in New York. If the USPS authorizes a Mailer for eDoc in the production environment (i.e., Mailer has passed the test criteria in the TEM) and paying the postage at the acceptance unit via the ready-to-pay file they can be included.

There are three options to update Advertising % values: 1) via Mail.dat (submit **Ready-to-Pay status where CPT file (Ad% code) is "F" for final**), 2) through manually entering in the Ad% value in the worksheet (submit **Ready-to-Pay status where CPT file (Ad% code) is "P" for Pending**) and 3) doing both ways. If you plan to update the Ad% value using Mail.dat only, you do not need to test Scenario 2, Script 8. Conversely, if you plan to update the Ad% value using the Ad% worksheet, you do not need to test Scenario 2, Script 7. If you will update the Ad% value both ways, you should perform all scripts.

The Publisher or Preparer may change the Ad % on the advertising percentage worksheet while the postage statement is in status UPD. There are messages showing traceability of who changed what on the bottom of the Ad % worksheet.

-
- ☛ If the Mail.dat file is required to match the entry in *PostalOne!* the Mailer may require no changes on the Ad % worksheet but resubmits the Mail.dat file with the corrected advertising percents. (Exhibit A-6)
 - ☛ The Publisher or Preparer may change the Ad % on the advertising percentage worksheet while the postage statement is in status FPP. Note, after the statement is in status FPP, only changes to the ad percent are possible, change to the edition weight is not.
 - ☛ If an Ad% value was entered on a worksheet it remains as entered in the worksheet and is not overwritten by the Mail.dat file. If the worksheet was not used, the Mail.dat job overwrites the Ad% value from the preliminary status. Postage is recalculated according to the data in the ready-to-pay container status job Figure A-1).
 - ☛ The Publisher or mailer is advised to coordinate with the acceptance office for appropriate communication that correct advertising percentages are updated via Mail.dat and the postage statements are ready for finalization and payment.
 - ☛ The estimated Ad% column data element cannot be updated and is read-only. For Mail.dat, the Ad% value is recorded for each component (not for the MPU). In the CPT file, data can be updated whereby the MPU data is calculated.
 - ☛ The mailer and BMEU will not be able to modify these components if the Ad % Treatment is N. In order to modify the Ad % on the Advertising Percentage Worksheet, the Ad % Treatment must be S.
 - ☛ For Mail.dat files, the advertising percentage comes from the Component file and the advertising percentage basis is used to compute the advertising percentage of the edition if the advertising percentage is populated on more than one component. The Appendix E Periodicals Procedures in the Postal Service Mail.dat Technical Specification contains full details on how to use the advertising percentage basis.

4.5 Edition Weight Worksheet

Upon notification from the Publisher or mail Preparer, the TEM team will verify (simulate the acceptance unit clerk weighing editions and using the Edition Weight worksheet to change the weights). The edition is identified by the Mail Piece Unit (MPU) ID, the MPR Name and the MPU Description.

The acceptance unit clerk weighs the editions and may update the USPS Verified weight on this worksheet. The postage charged reflects the USPS Verified weight. The column that shows the Weight % Difference is between the estimated weight and the USPS Verified weight. When the difference exceeds 5% a message displays to show what percentage of editions on the worksheet exceeded the tolerance.

This worksheet is available on a screen or to download in pdf, excel or csv format. The edition weight worksheet shows the Container Ship Date, the identification of the MPU, the Estimated Weight, the MPU Ad%, and the number of copies.

- ☛ A Mail.dat file update is required to change the weight of a ride-along or a repositionable note.
- ☛ The edition weights may not be changed after finalization except by reversing the postage statements and resubmitting the Mail.dat job
- ☛ The Mailer (Publisher or Preparer) may display the Edition Weight worksheet on the status UPD postage statement.
- ☛ If the Mail.dat file is required to match the entry in *PostalOne!* the Mailer may require no changes on the edition weight worksheet and resubmit the Mail.dat file with the corrected weights. (Exhibit E-1)

The Publisher or Preparer may change the Ad % on the advertising percentage worksheet while the postage statement is in status FPP. Note, after the statement is in status FPP, only changes to the ad percent are possible, change to the edition weight is not.

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Restrioted Information

Dashboard > Postage Statement > Edition Weight Worksheet Today's Date: 06/17/2009

Mailing Group Summary Information

Title: AUTOMOTIVE NEWS USPS Publication No.: 38700

Issue Date: 06/11/2009

Vol. No.: 83 Issue No.: 23

Job Name: 20000608 Contact Name: JIM CANTLEY

Job ID: CRAI0609 Contact Phone No.: (313)446-1615

Postage Statement Stage: UPD Contact Email: jcantley@stain.com

Acceptance Office: PEWAUKEE, WI 53072-9999

Component Edition Weight Worksheet [MPU View](#)

Component ID	Component Description	Component Weight Source	Component Weight Status	Component Weight	USPS Verified Weight	Weight % Difference	
00000001		AN0002	C	N	00.5684	00.5684	00.0000
00000002		AN0010	C	N	00.4249	00.4249	00.0000
00000003		AN0011	C	N	00.4943	00.4943	00.0000

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Figure E-1: Edition Weight Worksheet

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Redacted Information

Dashboard > Postage Statement > Edition Weight Worksheet Today's Date: 06/23/2009

Mailing Group Summary Information

Title:	AUTOMOTIVE NEWS	USPS Publication No.:	38700
Issue Date:	06/01/2009	Issue No.:	23
Vol. No.:	83	Contact Name:	JIM CANTLEY
Job Name:	20090508	Contact Phone No.:	(313)446-1615
Job ID:	CRAIG0810	Contact Email:	jcantley@rain.com
Postage Statement Stage:	UPD		
Acceptance Office:	PEWAUKEE, WI 53072-9998		

[MPU View](#)

Component ID	Component Description	Component Weight Source	Component Weight Status	Component Weight	USPS Verified Weight	Weight % Difference
00000001	AN0002	C	N	00.5684	00.5690	00.1054
00000002	AN0010	C	N	00.4249	00.4249	00.0000
00000003	AN0011	C	N	00.4943	00.4011	00.0000

Microsoft Internet Explorer

The weight entered is -23.2361% outside tolerance compared to estimated weight. OK to accept, Cancel to change.

Abandon Submit > < Back

OK Cancel

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Figure E-2: BMEU/DMU acceptance clerk will a pop up box when a value entered is outside the acceptable tolerance.

4.5.1 Outside County Container Report

The report header information comprises the Mailing Group ID, Preparer, Description, Mailer's Job #, Origin, Open Date, Close Date and USPS Publication Number and the Publication Title. If the job is co-mail, the Publication Title field displays the text, "Multiple.". The columns shown on this report are, Container ID, Entry Point ZIP Code, Destination ZIP Code, Container Type, Container Level, Entry, Total Pieces, and Total Weight (Figure O-2). The Container ID information is linked to more detailed information at the mail piece unit (MPU) bundle level and is listed directly below the report see Figure O-2a). The MPU bundle information is available as a download in pdf. Access Container ID information and to cross reference Bundle ID information (Figure O-1).

Note: The Qualification Report, accessed from the Dashboard, requires entering leading zeros in the Container ID field in order to get the results when performing a Container ID search.

UNITED STATES POSTAL SERVICE® You are in the Test Environment for Mailers (TEM) HOME | HELP | CUSTOMER CARE | SIGN OUT

Manage Mailing Activity

- Home
- Summary
- Balance and Fees
- Postal Wizard
- Electronic Data Exchange
- Mailing Reports
- Dashboard
- Manage Permits

Home > Dashboard Management System

Job Detail

Job Information Summary

Mailing Agent: ADVERTISING AGE	Mailing Date: 06/10/2009
Job Name: 20090608	Submit Date: 06/19/2009
Job ID: CRAIG619	Last Activity Date: 06/19/2009
Mailing Group ID: 69264803	Mailing % Complete: 0.00

Legend: [A] for spoilage adjustment. [B] for USPS adjusted entry. [F] for Full-Service statements [M] for Mixed-Service statements

Postage Statement ID	Verifications	Available Report(s)	Permit/USPS Number	Status	# of Pieces	Postage \$	
PS# 70021311 [cid:570240]			PE 38700	UPD	52,891	\$20,594.42	
PS# 70021017			PE 38700	CON	6	\$2.19	
PS# 70021018			PE 38700	CON	5	\$1.81	
PS# 70021019			PE 38700	CON	263	\$83.42	
PS# 70021020			PE 38700	CON	115	\$41.59	
PS# 70021021			PE 38700	CON	56	\$20.18	
PS# 70021022			PE 38700	CON	124	\$40.89	
PS# 70021023			PE 38700	CON	930	\$342.27	
PS# 70021024			PE 38700	CON	185	\$58.45	
PS# 70021025			PE 38700	CON	78	\$26.95	
PS# 70021273			PE 38700	CON	3	\$1.38	
PS# 70021274			PE 38700	CON	3	\$1.17	
PS# 70021275			PE 38700	CON	4	\$1.29	
PS# 70021276			PE 38700	CON	857	\$307.82	
PS# 70021301			PE 377030	CON	1,158	\$335.28	
PS# 70021302			PE 377030	CON	201	\$71.29	
PS# 70021303			PE 377030	CON	45	\$15.14	
PS# 70021304			PE 377030	CON	48	\$18.92	
PS# 70021305			PE 377030	CON	120	\$46.67	
PS# 70021306			PE 377030	CON	12	\$4.49	
PS# 70021307			PE 377030	CON	152	\$40.68	
Note: EST, CAN, and CON statements are not included in the TOTALS.					TOTAL:	132,225	\$46,284.79

eDocumentation Summary

Name of Report Available	# of Reports	# of Pieces	Postage (\$) (Estimated/Actual)
Outside County Container Report	1		
Qualification Report(s)	1	132,225	
Version Summary Report	1		
Reconciliation Report	1		

[Return To Search Results](#)

Figure O-1: The Job Detail page displays when a Job ID hyperlink is double clicked from the Search Results page. Note: This screen was cropped in several areas to allow a full page display.

Job Detail. Select any one Job ID to access the Job Detail page, which displays all files associated with the selected job, file upload date and time, and upload status. You can access the **Outside County Container Report, Qualification Report, Version Summary Report and the Reconciliation Report** from the links at the bottom of the page.

Restricted Information

Dashboard > [Outside County Container Report](#) > [Outside County Container Report](#)

Today's Date: 06/20/2009

Outside County Container Report

Mailing Group Summary Information

Mailing Group ID:	60264903	Mailer's Job #:	CRAID019	Open Date:	06-19-2009
Preparer:	8200-PE-ADVERTISING AGE	Origin:	MDAT	Close Date:	
Description:	20090608	USPS Publication Number:	Multiple	Publication Title:	Multiple

Select "Container ID" to view bundles related to this container.

Show Records: at a time

Container ID	Entry Point ZIP Code	Destination ZIP code	Container Type	Container Level	Entry Level	Total Pieces	Total Weight
000295	010	004	Pallets	ADC/AADC	Origin ADC	1392	414
000295	010	010	Sacks and Trays	SCF3-Digit	Destination ADC	99	44
000295	010	010	Sacks and Trays	SCF3-Digit	Destination SCF	99	44
000295	010	010	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	99	44
000296	010	012	Sacks and Trays	SCF3-Digit	Destination ADC	29	13
000296	010	012	Sacks and Trays	SCF3-Digit	Destination SCF	29	13
000296	010	012	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	29	13
000297	010	054	Sacks and Trays	SCF3-Digit	Origin ADC	50	22
000298	010	050	Sacks and Trays	SCF3-Digit	Origin ADC	70	31
000299	010	010	Sacks and Trays	SCF3-Digit	Destination ADC	6	3
000299	010	010	Sacks and Trays	SCF3-Digit	Destination SCF	6	3
000299	010	010	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	6	3
000300	010	010	Sacks and Trays	Mixed ADC/Mixed AADC	Origin ADC	7	3
000301	010	010	Sacks and Trays	SCF3-Digit	Destination ADC	50	9
000301	010	010	Sacks and Trays	SCF3-Digit	Destination SCF	50	9
000301	010	010	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	50	9
000302	010	054	Sacks and Trays	SCF3-Digit	Origin ADC	44	8
000303	010	010	Sacks and Trays	SCF3-Digit	Destination ADC	15	3
000303	010	010	Sacks and Trays	SCF3-Digit	Destination SCF	15	3
000310	010	010	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	10	7
000311	010	010	Sacks and Trays	Mixed ADC/Mixed AADC	Origin ADC	12	4
000312	014	015	Sacks and Trays	SCF3-Digit	Destination ADC	75	34
000312	014	015	Sacks and Trays	SCF3-Digit	Destination SCF	75	34
000312	014	015	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	75	34
000313	014	015	Sacks and Trays	SCF3-Digit	Destination ADC	74	34
000313	014	015	Sacks and Trays	SCF3-Digit	Destination SCF	74	34
000313	014	015	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	74	34
000314	014	016	Sacks and Trays	SCF3-Digit	Destination ADC	24	11
000314	014	016	Sacks and Trays	SCF3-Digit	Destination SCF	24	11
000314	014	016	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	24	11
000315	014	017	Sacks and Trays	SCF3-Digit	Destination ADC	103	47
000315	014	017	Sacks and Trays	SCF3-Digit	Destination SCF	103	47
000315	014	017	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	103	47
000316	014	015	Sacks and Trays	SCF3-Digit	Destination ADC	6	3
000316	014	015	Sacks and Trays	SCF3-Digit	Destination SCF	6	3
000316	014	015	Sacks and Trays	SCF3-Digit	Origin Post Office/DMU	6	3
000317	014	015	Sacks and Trays	SCF3-Digit	Destination ADC	83	14

Viewing 1 - 50 of 2143 records

[Next 50](#)

Exhibit O-2: Outside County Container Report, accessed from the Job Detail (Figure O-1) page which displays when a Job ID hyperlink is double clicked from the Search Results page. Note: This screen was cropped in several areas to allow a full page display

4.6 Container Summary Report

The Container Summary summarizes the Outside County Containers by type. For each type (pallet, sack, or tray) the report provides the postage statement lines that apply and the numbers of containers on each line. The container summary includes the rates and calculated postage for the containers and the bundles.

[All MPU Bundle and Container Apportionments \(PDF\)](#)

Pallet Summary Information				
Totals				
Container Level	Entry Level	Pallets	Rate	Postage
ADC/AADC	Origin ADC	9.0000	28.000	252.0000
ADC/AADC	Origin BMC	7.0000	28.000	196.0000
ADC/AADC	Destination ADC	5.0000	12.400	62.0000
SCF/3-Digit	Origin BMC	4.0000	33.360	133.4400
SCF/3-Digit	Destination ADC	2.0000	20.700	41.4000
SCF/3-Digit	Origin ADC	9.0000	33.360	300.2400
ADC/AADC	Origin SCF	1.0000	28.000	28.0000
SCF/3-Digit	Destination SCF	20.0000	11.100	222.0000
Total of Pallets		57.0000		1235.8800
First Ten MPUs Pallet Apportionment Information				
MPU No. 00001 Publication No.38700 AUTOMOTIVE NEWS				
Container Level	Entry Level	Pallets	Rate	Postage
SCF/3-Digit	Destination ADC	0.0083	20.700	0.1721
Sub Total		0.0083		0.1721
Total of Publication No. 38700				
		0.0083		0.1721
MPU No. 00007 Publication No.377030 B TO B				
Container Level	Entry Level	Pallets	Rate	Postage
SCF/3-Digit	Destination ADC	0.0643	20.700	1.3305
Sub Total		0.0643		1.3305
Total of Publication No. 377030				
		0.0643		1.3305
MPU No. 00003 Publication No.38700 AUTOMOTIVE NEWS				
Container Level	Entry Level	Pallets	Rate	Postage
SCF/3-Digit	Destination ADC	0.8375	20.700	17.3367
Sub Total		0.8375		17.3367
MPU No. 00002 Publication No.38700 AUTOMOTIVE NEWS				
Container Level	Entry Level	Pallets	Rate	Postage
ADC/AADC	Destination ADC	1.2243	12.400	15.1809
Sub Total		1.2243		15.1809
Total of Publication No. 38700				
		2.0618		32.5176
MPU No. 00006 Publication No.377030 B TO B				
Container Level	Entry Level	Pallets	Rate	Postage
SCF/3-Digit	Destination SCF	0.4748	11.100	5.2702
Sub Total		0.4748		5.2702
Total of Publication No. 377030				
		0.4748		5.2702
MPU No. 00001 Publication No.38700 AUTOMOTIVE NEWS				
Container Level	Entry Level	Pallets	Rate	Postage
SCF/3-Digit	Destination SCF	0.0299	11.100	0.3315
Sub Total		0.0299		0.3315
Total of Publication No. 38700				
		0.0299		0.3315
MPU No. 00007 Publication No.377030 B TO B				
Container Level	Entry Level	Pallets	Rate	Postage
ADC/AADC	Origin SCF	0.0125	28.000	0.3507
Sub Total		0.0125		0.3507
Total of Publication No. 377030				
		0.0125		0.3507
MPU No. 00004 Publication No.8200 ADVERTISING AGE				
Container Level	Entry Level	Pallets	Rate	Postage
SCF/3-Digit	Origin BMC	1.2283	33.360	40.7882
Sub Total		1.2283		40.7882
Total of Publication No. 8200				
		1.2283		40.7882
MPU No. 00007 Publication No.377030 B TO B				
Container Level	Entry Level	Pallets	Rate	Postage
ADC/AADC	Origin BMC	0.2046	28.000	5.7291
Sub Total		0.2046		5.7291
Total of Publication No. 377030				
		0.2046		5.7291
MPU No. 00002 Publication No.38700 AUTOMOTIVE NEWS				
Container Level	Entry Level	Pallets	Rate	Postage
ADC/AADC	Origin BMC	1.8158	28.000	50.8410
SCF/3-Digit	Origin BMC	0.6724	33.360	22.4297
Sub Total		2.4882		73.2707
MPU No. 00001 Publication No.38700 AUTOMOTIVE NEWS				
Container Level	Entry Level	Pallets	Rate	Postage
ADC/AADC	Origin SCF	0.0010	28.000	0.0292
Sub Total		0.0010		0.0292
Total of Publication No. 38700				
		2.4892		73.2999
Total of First Ten Individual Publications				
		6.5657		159.7098

*Pallet Summary is for the entire Outside County Container Report.

Figure O-2a: Bundles related to Outside County Container Report

4.7 Reconciliation Report

The Reconciliation Report displays the total number of mail pieces listed in the Mail.dat[®] postage statements, and the total number of pieces that have actually been received by the BMEU. This information is used to compare the number of mail pieces and associated prices in the Qualification Report with the corresponding information in the postage statement. The comparison enables acceptance employees to determine whether postage statements have been submitted for the entire mailing and to account for mail pieces that have not yet been submitted.

The Reconciliation Report provides information on the following:

- *Qualification Report* — The mail pieces submitted on the Qualification Report.
- *Postage Statement* — The mail pieces submitted on the postage statement.
- *USPS Processing Due* — The mail pieces submitted on the postage statement that have not been finalized.
- *Finalized* — The mail pieces submitted on the postage statement that have been finalized

Postage statements submitted prior to the receipt of the entire mailing can still be finalized, and the Reconciliation Report continues tracking incoming mail pieces as they are submitted. Reconciliation Report information is also updated as postage statements are submitted for each mailing.


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Dashboard > Reconciliation Report Today's Date: 06/18/2009

Mailing Group Summary Information

Mailing Group ID: 60264457	Mailing's Job #: 60264457	Finance Number: 566490
Prepare: 06-18-2009 08:11:00 AM	Open Date: 06-18-2009	Close Date:
Description:		

Reconciliation Report					
Qualification Report		Closed/Withdrawn		Postage Statements*	
Price Category	Pieces	Price Category	Pieces	Price Category	Pieces
Auto 5-Digit	71,639	Auto 5-Digit	0	Auto 5-Digit	0
Presort 5-Digit	520	Presort 5-Digit	0	Presort 5-Digit	0
Auto 3-Digit	43,342	Auto 3-Digit	0	Auto 3-Digit	0
Presort 3-Digit	395	Presort 3-Digit	0	Presort 3-Digit	0
Auto ADC/AADC	2,034	Auto ADC/AADC	0	Auto ADC/AADC	0
ADC Presort	28	ADC Presort	0	ADC Presort	0
Mixed ADC Presort	4	Mixed ADC Presort	0	Mixed ADC Presort	0
Auto Mixed ADC/AADC	599	Auto Mixed ADC/AADC	0	Auto Mixed ADC/AADC	0
Carrier Route Basic	13,260	Carrier Route Basic	0	Carrier Route Basic	0
Firm Bundle	434	Firm Bundle	0	Firm Bundle	0
				Sub-Total	0
				Spoiled/Damaged	0
Total	132,225	Total	0	Total	0

* Reflects current number of pieces mailed; subtracting reversed pieces and adding in finalized pieces.

Reconciliation Report Summary	
Planned	Actual
	Closed/Withdrawn 0
	Spoiled/Damaged 0
	Finalized* 0
Qualification Report:	132,225
Pieces Accounted For:	0

* Reflects current number of pieces mailed; subtracting reversed pieces and adding in finalized pieces.

Current Status: Not Reconciled

Other Information	
Number of Occurrences	
Reversals	0
Revoked	0
Cancel	0

The postage amount does not include all discounts, surcharges and additional postage that may be charged upon verification.

Exhibit RR-1: Reconciliation Report: **Before Finalization**

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Restricted Information

Dashboard > Reconciliation Report Today's Date: 06/19/2009

Mailing Group Summary Information

Mailing Group ID:	7	Mailer's Job #:	2,39	Finance Number:	
Preparer:		Open Date:	06-16-2009	Close Date:	
Description:	20090608				

Postage Statement pieces and postage is populated

Reconciliation Report					
Qualification Report		Closed/Withdrawn		Postage Statements*	
Price Category	Pieces	Price Category	Pieces	Price Category	Postage
Auto 5-Digit	71,639	Auto 5-Digit	0	Auto 5-Digit	\$19,772.364
Presort 5-Digit	520	Presort 5-Digit	0	Presort 5-Digit	\$148.72
Auto 3-Digit	43,342	Auto 3-Digit	0	Auto 3-Digit	\$15,689.804
Presort 3-Digit	395	Presort 3-Digit	0	Presort 3-Digit	\$151.285
Auto ADC/AADC	2,034	Auto ADC/AADC	0	Auto ADC/AADC	\$766.818
ADC Presort	28	ADC Presort	0	ADC Presort	\$11.20
Mixed ADC Presort	4	Mixed ADC Presort	0	Mixed ADC Presort	\$11.74
Auto Mixed ADC/AADC	569	Auto Mixed ADC/AADC	0	Auto Mixed ADC/AADC	\$229.307
Carrier Route Basic	13,260	Carrier Route Basic	0	Carrier Route Basic	\$2,360.28
Firm Bundle	434	Firm Bundle	0	Firm Bundle	\$77.252
				Sub-Total	\$46,284.79
				Spoiled/Damaged	\$0.00
Total	132,225	Total	0	Total	\$46,284.79

* Reflects current number of pieces mailed; subtracting reversed pieces and adding in finalized pieces.

Reconciliation Report Summary	
Planned	Actual
	Closed/Withdrawn 0
	Spoiled/Damaged 0
	Finalized* 132,225
Qualification Report: 132,225	Pieces Accounted For: 132,225

* Reflects current number of pieces mailed; subtracting reversed pieces and adding in finalized pieces.

Current Status: Not Reconciled

Other Information	
Number of Occurrences	
Reversals	0
Reworked	0
Cancel	0

The postage amount does not include all discounts, surcharges and additional postage that may be charged upon verification.

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Exhibit RR-2: Reconciliation Report: After Finalization

4.8 Issue Level Summary

This summary shows the postage statement register for the publication issue. The columns are the Stage, the Acceptance Office, the Container Count, the Container Type, the Total Copies, the Total Pieces, the Total Pounds, and the Total Postage. The postage statement status is F for final or R for ready-to-pay. F means the acceptance personnel have finalized the postage statement and debited the account. R means that the ready-to-pay mail.dat file is sent and available to be finalized. The columns link to the Acceptance Office where there is a detailed register. When there no link, a postage statement was filed but it was not a mail.dat statement having the details required for the register. To access the Issue Level summary, select the link to the version summary for the issue is available at the top left of the postage statement. The link at the top right of provides a download of the information in pdf, excel or csv formats. Alternatively, the summary can be accessed from the Mailing Reports link under the Manage Mailing Activity menu.

Section 5: Production Environment

5.1 Step 4: Migrate to Production

Actions Required				
PCSC	Publisher	Help Desk	TEM Team (CAT)	Acceptance Office (DMU)
✓	✓	✓		✓

PUBLISHER

- Publisher request the CAPS Service Center to link all CAPS accounts to the publications in the production environment: Fills out the form available at <http://caps.usps.gov/capshome.asp>. Click on Forms and complete PS Form 6002, Accounts and Services to be Paid Through CAPS.

Telephone 650-377-1334
 FAX 650-377-5336
 E-mail ssmctas@email.usps.gov
 Address CAPS Service Center
 US Postal Service
 2700 Campus Drive
 San Mateo CA 94497-9442

- ✓ Original Form must be signed by the CAPS account owner. CAPS Service Center will set up the CAPS account and link the permits to the CAPS account.
- ✓ Other Periodicals permits must also be linked to the local CAPS accounts using PS Form 6002 (e.g., Standard Mail Enclosures and First-Class Mail Enclosures)

- Apply for an Original entry and/or make changes to additional entry offices if necessary.

Note: Publishers must apply for an Original entry and make changes to additional entry offices using Form 3510 (separate forms and fees may be required). Because the Publisher is required to submit requests for establishing, modifying, or canceling an additional entry at least 30days before the requested effective date, it is recommended to apply in advance of completing testing in the TEM or anytime before. Refer to the DMM, sections 30.2.6 and 30.2.8. Additionally, the PCSC manager may deny requesting additional entry. If the application is denied, the denial takes effect 15 days from the Publisher's receipt of the notice of denial (refer to DMM section 30.2.10).

- Notify the PCSC at least two weeks before the earliest mailing date for which acceptance offices which will begin using eDoc (must also include the mailing date)

Note: 2 weeks is the lead time such that would allow the CAPS Service Center and the acceptance office to update the USPS Publication Number account for the eDoc submissions. The PCSC must also change their procedures, no longer expecting the publisher to deliver postage data to enter the postage statements. For those publishers who choose to pay for each Mail.dat job, the PCSC also requires this advance notice to release the funds in the escrow account.

- For any postage payment at the PCSC CPP unit, provide the postage statement for entry at the PCSC. This postage statement shall not include any copies paid for with electronic mailing files (either Mail.dat or Postal Wizard).

-
- Publisher communicates any updates (changes since TEM) to any Periodical records to the PCSC. Note the List of Publications worksheet can be used for this purpose if necessary for changes to the PCSC email **pcsc@usps.gov**. Attn: Chuck Tricamo (Exhibit 2).
 - Conduct final verification CPP payments eligibility check.
 - o One Original Entry office designated on the permit record.
 - o Mail.dat file coded with the postage payment method in the MPA file is set to C.
 - o Maintain Escrow balance. Note. If CPP mailers elect to pay when the postage is finalized, there is no need to maintain an escrow balance.

TEM TEAM / HELP DESK / BSM Full-Service Electronic Documentation Acquisition Team (FEDAT)

- When all required Scenarios have been validated with PASS criteria, TEM Team replies to All, email HELP DESK with Subject: PASSED - Official *PostalOne!*® CPP Enrollment of COMPANY X.

HELP DESK

- Upon receipt of email from TEM Team with Subject: PASSED - Official *PostalOne!*® CPP Enrollment of COMPANY X, HELP DSK sends email of Notification of File Validation Testing Completion to:
 - o COMPANY X
 - o CC Pritha Mehra
 - o pcsc@usps.gov. Attn: Chuck Tricamo
 - o BMS FEDAT Team

BSM FEDAT

- Upon receipt of email from Help Desk with Subject: PASSED - Official *PostalOne!*® Enrollment of COMPANY X, BSM FEDAT sends email of Notification of File Validation Testing Completion to Software Vendor X (only if their end users are required to complete the Test Criteria for their own files).
- FEDAT ensures notification is sent to the appropriate BMSA. Refer to Full-Service Electronic Documentation Acquisition Team (FEDAT) Process document.
 - o BSM FEDAT notifies Special Postage Payment System mailers of BMS Authorization.
 - o Follow up with MBME (possible on-site review).
 - o Ensure BMEU/DMU complies with Acceptance Responsibilities.

BMEU/DMU

- Verify CPP payments eligibility (work with Publisher if there is an anomaly):
 - o One Original Entry office designated on the permit record.
 - o Permits used in the Mail.dat file are linked to a CAPS account.
 - o BMEU/DMU at the original entry office changes the publication record to indicate CPP (CPP Mailer flag set to Yes) on the permit record. Enable this feature at all acceptance offices for that publication.
- DMU/BMEU (acceptance unit) migrates any remaining customer data in *PostalOne!* either using the worksheet/documentation from the PCSC, TEM Team or Help Desk or documentation provided by Publisher

-
- ✓ Enter data into *PostalOne!* for each additional entry office and verify the link to the Original entry office. All fields of each section that are of particular importance are same as numbers 1-17 in Exhibit 3.
 - ✓ Link Original entry office to all additional entry offices.
 - ✓ Link all CAPS accounts to Local Office Finance numbers.
 - ✓ Work with Publisher for any affected acceptance units since TEM.
 - Acceptance personnel will email Publisher to communicate successful permit update at the acceptance offices.
 - Contact Customer using Standard email templates in (FEDAT) Process document for production authorization.

PCSC

- PCSC corrects at PCSC Finance number requested by the Publisher per changes since completing TEM.
- If a mailer is using consolidated payment, the PCSC must assign a USPS acceptance unit to determine how much escrow balance must be maintained for the late payment of postage. If CPP mailers elect to pay when the postage is finalized, there is no need to maintain an escrow balance.

Appendix A: Test Scenario Criteria for Periodicals

To ensure proper and thorough testing, submit files that reflect volumes typical of what would be mailed in *PostalOne!* production and by selecting scenarios applicable to your mailing operation.

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

Scenario	eDocumentation / Basic		Full-Service	
	Required	Optional	Required	Optional
P1	X		X	
P2	X		X	
P3		X		X
P4			X	
P5		X		
P6		X		X
P7		X		X
P8		X		X
P9		X		X
P10		X		X
P11		X		X
P12		X		X
P13		X		X

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 or PBC (Piece Barcode Record).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

Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file or PBC (Piece Barcode Record).

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 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)

Payment Request (CPP Only)

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)

Payment Request (CPP Only)

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)

Payment Request (CPP Only)

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)

Payment Request (CPP Only)

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)

Payment Request (CPP Only)

Scenario P11 Periodicals with supplemental mailings: 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 supplemental mailings.

Ad Percentage Worksheet(s)

Edition Weight Worksheet(s)

Payment Request (CPP Only)

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)

Payment Request (CPP Only)

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-incidentals and incidentals 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

Payment Requests (for publication issues that are CPP)

Appendix B: Formatting Mail.dat and other CPP Tips

Component Based

In Mail.dat the Ad % and the weight are tracked at the component level. There may be one or more components in a mail piece unit. Components consist of subscriber cards, incidental enclosures, ride along, the main book, and the wrap. The cumulative weight of these components is the single weight of a mail piece. Each component may be defined as relevant for the Ad % calculation by using the components with CPT field 'Ad Percent Treatment' value 'S' Carries Own Ad Percentage. If more than one component is relevant to the Ad % calculation, the Mail.dat file provides a new field Ad % basis used to calculate the total Ad % used in the postage statement for that mail piece unit. In this case the total Ad % is the average of the components weighted by the Ad % basis. If there is more than one component in the mailpiece unit relevant to the ad percent calculation (marked with Ad % Treatment = S), *PostalOne!* requires the Ad % basis for the components marked with Ad % Treatment S. If the Ad % is calculated at the MPU level then place the Ad % on one Ad % relevant component.

Ad % Basis

To find the total Ad %, multiply the first component Ad % with its Ad % basis. Multiply the second component Ad % with its Ad % basis. Add these two values and divide by the total of the two Ad % basis. This value is the total Ad % used to calculate postage for the mail piece unit (MPU.)

There are two components. One has 10% advertising with ad percent basis 4,000 and another has 20% advertising with ad percent basis 6,000. What is the total Ad percent.

$$\begin{aligned} &(10\% \times 4,000 + 20\% \times 6,000) / 10,000 \\ &= (40,000 + 120,000) / 10,000 \\ &= 160,000 / 10,000 = 16\% \end{aligned}$$

Ad % Basis

CPT file field Periodical Ad%

When the .cpt file field Periodical Ad% Treatment is not S, the advertising percent worksheet shows the initial Ad % as the .cpt file field Component - Periodical Ad % value submitted in the Mail.dat file. Conversely, the .cpt file field Periodical Ad% Treatment must be S in order to change the advertising percentage in the advertising percentage worksheet.

Container Status

File transfers that include one or more containers with status "D" result in the cancellation of the entire postage statement and impact the reconciliation report accordingly. The IM Barcode(s) for the containers, trays, and pieces of a deleted container cannot be used for the 45 days from the time the "D" status is sent for the container.

Original file transfers can have a container status "P" value. A preliminary or estimated postage statement will be generated with the Qualification Report. This postage statement will have the stage "EST" displayed on the Dashboard.

File transfers with the container status "R" generate postage statements with a stage "UPD" (USPS Processing Due) displayed on the Dashboard. Postal clerks can only finalize (bill) UPD postage statements.

The "R" value can only be resent if a container is cancelled (set to "C") prior to the second "R" being sent. The file fails if a second "R" is sent without canceling the container first.

To update transportation information, use the "T" value to update the FAST recurring appointment and CSA information and container barcode information in a file set of "R" or "X". The only way to update a file marked "X" is with a "T." A "T" value is accepted only after an "R" or "X" has been sent because no transportation update is necessary until the indication of payment. You can update transportation information only after it has been marked Ready to pay ("R") or Paid and Closed ("X"). Original file transfers fail if a "T" is sent.

Updates to weight are reflected only in a postage statement with a "P" or an "R" value. If an update to weight is received within any other update, it is logged, but no recalculation of the postage statement occurs until a "P" or an "R" value is received.

Only one estimate of postage is generated for an entire mailing job, unless more than one actual postage statement is required for the mailing or the same containers are sent multiple times with status "P". Original job files generate preliminary statements, and group containers by date; to perform these functions, the container status associated with the original submission must be "P". A separate update is not required.

To send an update to an existing Job in the system, make sure that all File Status flags in each file being transmitted reflect a "U" for update. All subsequent files included in the transfer of an update should include a "U" in the File Status flag field. For example:

- The Segment File SEG Record Status Flag should contain a "U" for an update.
- The Mail Piece Unit File MPU Record Status Flag should contain a "U" for an update.

Alternately, to resend an original file, first delete the job, and then resend the job. The same Job ID can be used if the first attempt to submit if the file is deleted prior to the second attempt.

Preliminary Container Status. When the Preparer sends a Mail.dat in preliminary container status job (postage statement is in EST Status), to *PostalOne!* the Mailer may use the Advertising % worksheet to correct advertising %.

Container Summary Record field Postage Statement Mailing Date:

1. System does not require the CSM Postage container Mailing Date if the CSM Container Status is Original. There is no need for Postage container Mailing Date because there is no postage container created for this case.
2. The system does not require the CSM Postage container Mailing Date if the CSM Container Status is Preliminary. The Postal Service does not use the estimated postage containers generated for this case.
3. When no CSM Postage container Mailing Date is provided, the system will use the current system date for the mailing date on the estimated postage containers

Postage is re-calculated when any of the following occurs:

1. Owner updates Advertising Percentage Worksheet.
2. Preparer sends Mail.dat ready-to-pay job.
3. BMEU updates Edition Weight Worksheet
4. Owner updates Advertising Percentage Worksheet (after BMEU previously updated)

Miscellaneous Known Issues:

Comail or co-palletization will normally be assigned a combined mailing ID that links a verification statement together with all of the postage statements for the unique publication issues in the mailing (Publication issues are represented by Publication Number considered together with Issue Date or Volume Number and Issue Number in the Mailer Postage Account file).

Issue Level Statement. All publication titles at all finance numbers for the same permit must match exactly in order to create an Issue Level Postage Statement.

Appendix C: Data Set Up Worksheets

Mailer ID	Location CRID	Address	City	State	ZIP
9XX XXX XX1	XXX XXX XXX XX1	123 Main Street NW	Washington	DC	20010
9XX XXX XX2	XXX XXX XXX XX2	234 7th Street	Washington	DC	20026
9XX XXX XX3	XXX XXX XXX XX3	345 Georgia Street	Washington	DC	20012
9XX XXX XX4	XXX XXX XXX XX4	456 M Street NW	Washington	DC	20013
9XX XXX XX5	XXX XXX XXX XX5	678 U Street	Washington	DC	20011

📁 List of Mailer IDs Tab

Printer Location	Finance #	Post Office where Publication is paid	Publication Name (Title)	USPS Pub No.	CAPS Account No.	CAPS debit/credit	Co-Mail?	Co-Pal?	Consolidated Payment?	TEM Test ?	Gateway Username
Mattoon, IL	164950	New York, NY	The Bangkok Magazine	XXX-XXX	YYYYY	Debit	No	No	Yes	No	

📁 List of Publications Tab

Printer Name	Location Name	Environment Type	City	State
TRT	Pontiac	DMU	PONTIAC	IL

📁 List of Printer Locations Tab

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