



Guide to the Business Customer Gateway On-line Services, and Full-Service Tools

Version 9.0

November 9, 2012

Change History

These are the changes from Version 8.0 (07/06/2012) to Version 9.0 (11/09/2012).

Section #	Title	Description
8.7.3.1	Data Recipient Options	Replaced screenshots with current versions. Updated text to match screen shots. Deleted paragraphs referring to Cast of Characters. Deleted paragraph referring to dynamic profile
Entire	Name Change	From: User Access to Electronic Mailing Information & Reports Guide, Volume I: Business Customer Gateway Information, On-Line Services and Full-Service Tools. To: Guide to the Business Customer Gateway On-Line Services and Full-Service Tools. All references to Volume I or Volume II corrected to document title.

These are the changes from Version 7.0 (01/06/2012) to Version 8.0 (07/06/2012).

Section #	Title	Description
2	Navigating the Business Customer Gateway	Replaced screenshots with current versions. Clarified navigational links. Corrected pending time for BSA request to 25 days.
3.1, 3.1.5, and 3.2.2	Mail.dat, Mail.XML	Updated and replaced with current versions of Mail.XML technical specifications; Added a note regarding changes to Maildat supported versions for each releases.
3.2.3	Mail.XML Full-Service Checklist	Removed outdated Mail.XML versions and replaced with current versions supported for full- service.
3.2.4	Table 4 - Mail.XML Software testing in TEM	Updated Table 4 and replaced with current versions of Mail.XML for FAST, eDoc, and data distribution supported in TEM.
3.2.4	Table 4 - Mail.XML Software testing in TEM	Added a new column in Table 4 for Profile Management (MID-CRID) Mail.XML messages supported in TEM.
8	Mailer ID System	Replaced screenshots with current versions. Updated terminology to be current.

These are the changes from Version 6.7 (11/16/2011) to Version 7.0 1/6/2012).

Section #	Title	Description
1, 7, and 8	Various	Updated screenshots
4, 5	Postal Wizard Reports (PostalOne!)	Clarified that prices shown are for illustration purposes only.
Various	Various	Fixed formatting

These are the changes from Version 6.6.3 (9/20/2011) to Version 6.7 (11/16/2011).

Section #	Title	Description
1.3 3.1.4	Finding Information	Updated references to Test Environment for Mailer guides. Removed references to specific version of Mail.dat
2	Navigating the Business Customer Gateway	Replaced the following figures with new screenshots for Business Customer Gateway (BCG): 2-1, 2-3, 2-4, 2-5, 2-6, 2-12, 2-13, 2-14, 2-15, 2-17, 2-18, 2-26, 2-33, 2-34, 2-39 & 2-44. Removed what was Figure 2-18, now a redundant screenshot Added captions for Figures 2-35 through 2-48 for consistency with other figures
3	Electronic	Renumbered references to figures as needed. Replaced Figure 3-1 with new screenshot for BCG.

Section #	Title	Description
	Documentation Initial Set-up and Access	
4	Postal Wizard	Replaced Figures 4-1, 4-9, and 4-26 with new screenshots for BCG.
5	Reports (PostalOne!)	Replaced Figure 5-8 with new screenshot for BCG
8	Mailer ID System	Replaced Figure 8-1 with new screenshot for BCG

These are the changes from Version 6.5.10 (8/2/2011) to Version 6.6.3 (9/20/2011).

Section #	Title	Description
8.3.2	Exceptions for Mailer ID Application	Updated to include current information on Mailer ID Application and Exceptions
8.6.3	Assigning MIDs	
8.6.5	Mailer ID Use	

These are the changes from Version 6.5 (6/8/2011) to Version 6.5.10 (8/2/2011).

Section #	Title	Description
7	TEM	Removed Mail.dat/Mail.XML outdated file version references Added information for exporting Mailer ID Data (Section 8.8), searching by Customer Reference (Section 8.7.1), changing Mailer ID Delete process (Section 8.7.1), and new Full-Service ACS Unassociated Billing Profile (Section 8.9).
8	Mailer ID System	Added or changed screenshots relating to MIDs: Figure 8-2, Figure 8-7, Figure 8-14
Throughout		Clarified wording in references to RIBBS and OneCode ACS as needed

These are the changes from Version 6.5 (3/31/2011) to Version 6.5.6 (6/8/2011).

Section #	Title	Description
2.6	Requesting a Business Service	Added reference to Contingent Services
2.9	Contingent / Dependent Services	Added section for new functionality
Appendix A	Test Criteria for the TEM Sample	Updated sample of First-Class scenarios

These are the changes from Version 6.3 (6/21/2010) to Version 6.5 (3/31/2011).

Section #	Title	Description
2	Navigating the Business Customer Gateway	Added information on VAE role, Section 2.8.3 "BSA Role of VAE". Corrected grammatical errors and numbered references to figures. Replaced Figure 2-19 "Selecting a Business Service" with update.
3.2.3	Mail.XML Full-Service Checklist	Revised for current date
3.2.4	Mail.XML	Showed correct versions for Mail.XML
4	Postal Wizard	Updated Section 4.3.5 "Postal Wizard Full-Service Requirements" to show that a range is required to receive full-service feedback.
5	Reports (PostalOne!)	Added Section 5.5 "Full-Service eDoc Error Report" for new report, including cross-reference to MicroStrategy verification

Section #	Title	Description
		error reports in Volume 1. Updated to show that full-service discount removal is not currently scheduled.
Change History		Moved to front of document for consistency with other documents.

These are the changes from Version 6 (3/31/2010) to Version 6.3 (6/21/2010).

Section #	Title	Description
1	Introduction	Updated references to documentation. Updated names of Gateway links. Added overview of Postal Wizard and Mail.dat. Reordered paragraphs for clarity.
2	Navigating the Business Customer Gateway	Updated cross references. Updated names of Gateway and application links. Updated descriptions of flow through application. Clarified language. Updated report name. Added clarification on Audit Mailing Activity.
3	Electronic Documentation Initial Set-up and Access	Updated names of links, versions of Mail.XML, versions of documentation, figures.
4	Postal Wizard	Updated cross-references, Gateway and Postal Wizard layout, screenshots, Clarified language. Updated information on permits.
5	Reports (PostalOne!)	Removed duplicate information.
7	Test Environment for Mailers (TEM)	Updated screenshots, Mail.dat versions, cross-references. Clarified language and document format.
8	Mailer ID System	Updated By/For Identification, Navigating the MID System, Applying for a Mailer ID, Mailer ID Use, and Data Recipient Options. Updated cross-references, screenshots. Clarified language
Appendix B	Access to Online Postage Statements	Updated cross-references. Clarified language.

These are the changes from Version 5.10.1 (3/25/2010) to Version 6 (3/31/2010).

Section #	Title	Description
Document	Throughout	Added Trademark to RIBBS®
Chapter 6	Facility Access & Shipment Tracking (FAST)	Updated references to <i>PostalOne!</i> hierarchy page for FAST hierarchy page.
Chapter 6	Figures for FAST hierarchy	Updated to include figures 6-1, 6-2, 6-3 to demonstrate <i>PostalOne!</i> hierarchy page change to FAST hierarchy page.

These are the changes from Version 5.10 (3/9/2010) to Version 5.10.1 (3/25/2010).

Section #	Title	Description
4.0	Figures for PS FORM 3541 and PS Form 3600	Updated to include figures 4-14, 4-19, 4-35, 4-36, and 4-37 to demonstrate nomenclature change to NDC from BMC.

These are the changes from Version 5.4 (1/15/2010) to Version 5.10 (3/9/2010).

Section #	Title	Description
4.0	Postal Wizard, Dashboard	Updated to include new figures
Appendix B	Throughout	Updated to include new sections

These are the changes from Version 5.4 (1/15/2010) to Version 5.9 (3/9/2010).

Section #	Title	Description
Document	Throughout	Removed references to November 15.
Document	Throughout	Changed Full-Service to full-service and basic to basic automation
2.2	The USPS.com Web site	Inserted the updated the Business Customer Gateway Landing screen: Figure 2-2
2.2	The USPS.com Web site	Inserted the updated the Gateway user homepage – the user is signed in screen: Figure 2-3
These are the changes from Version 5.7 (1/15/2010) to Version 5.10 (3/9/2010).		
Section #	Title	Description
Page 1	Trademark info block	Updated trademark block to remove IM™ and include IM®
2	Figure 2-5	Access to a user's profile information
2	Figure 2-7	Users can access Manage Permits from their Gateway homepage.
2	Figure 2-13	The Gateway sign up for new users
2	Figure 2-30	User Management functionality for BSAs only
3	Figure 3-1	Electronic Data Exchange Link
4	Figure 4-9	To Access the Postal Wizard the user selects the link from her homepage
4	Figure 4-26	Accessing the Dashboard from the Mailing Reports link
8	Figure 8-1	User accesses the Mailer ID System from Gateway homepage
7.4	<i>PostalOne!</i> Mail.dat Client	Removed section, information is documented in the Postal Service Mail.dat Technical Specification , Chpt 3
Document	Throughout	Formatting Changes

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1. Introduction

1.1 The Business Customer Gateway

The Business Customer Gateway is the Web interface to United States Postal Service (USPS) online offerings from the small business owner to service providers within the postal supply chain. The Gateway unifies applications used by *PostalOne!* customers and is regularly enhanced with new functionality to support new mail entry and payment technologies including Intelligent Mail Services. The Gateway is accessible directly from <https://gateway.usps.com/bcg/login.htm> or by clicking the link on the lower right corner of [USPS.com](https://usps.com) (Figure 2-1).

1.2 About this Guide

The Guide to the Business Customer Gateway On-line Services, and Full-Service Tools contains chapters one through eight and comprises an overview of the Business Customer Gateway, Electronic Documentation, Mail.dat, Mail.XML, Postal Wizard, *PostalOne!* Dashboard, FAST, Test Environment for Mailers (TEM), and the Mailer ID system.

Electronic Mailing Information and Reports Guide is a separate companion document with the focus on reports and how to access them through the Business Customer Gateway. Topics of interest in these documents include:

Guide to the Business Customer Gateway On-line Services, and Full-Service Tools

- Business Customer Gateway
- Mailer ID (MID) System
- Business Services Administrator
- Postal Wizard
- Access to Postage Statements
- Postage Statement Reports
- Test Environment for Mailers (TEM)
- Mail.XML
- Facility Access and Shipment Tracking (FAST)

Electronic Mailing Information and Reports Guide

- Full-Service Reports Access
- Push Data Subscription
- Pull Data Mail.XML
- Move Update Report
- Full-Service Mail Quality Report
- Full-Service Data Quality Reporting
- Reports access for Periodical mailers and the Consolidated ePayment feature

1.3 Finding Information

Detailed documentation and guides related to Intelligent Mail solutions are available on the RIBBS Web site at <http://ribbs.usps.gov/index.cfm?page=intellmailguides>.

- [Test Environment for Mailers \(TEM\) Guides](#):
 - eDoc and Full-Service Authorization Guide for Mail.dat
 - eDoc and Full-Service Authorization Guide for Mail.XML
 - FAST Authorization Guide for Mail.XML
 - Full-Service Data Feedback Authorization Guide for Mail.XML
- A [Guide to Intelligent Mail for Letters and Flats](#): comprehensive information on full-service and basic automation
- A [Resource Map to Intelligent Mail Documents](#): quick reference to Intelligent Mail documentation
- [Postal Service Mail.dat Technical Specification](#): electronic documentation (eDoc) and Mail.dat development
Postal Service Mail.XML Technical Specification: Separated based on subject matter into the following volumes:
 - [Postal Service Mail.XML Technical Specification for Postage Payment & Reporting](#)
 - [Postal Service Mail.XML Technical Specification for Appointment Scheduling \(FAST\)](#)
 - [Postal Service Mail.XML Technical Specification for Profiles & Full-Service Feedback](#)
- A Guide to Customer/Supplier Agreements: purpose and scope
- USPS IMb Getting Started Guide: To understand the high-level steps for creating the IMb
 - https://ribbs.usps.gov/onecode_solution/documents/getstrtd/USPSIMB_Getting_Started.pdf

1.4 Electronic Documentation Overview

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

Full-service requirements include the use of an approved electronic method to transmit mailing documentation to the USPS. Approved electronic methods include Mail.dat, Mail.XML and Postal Wizard. Electronic methods produce electronic documentation for generation of qualification reports, container and bundle reports, spoilage, eDropShip, containerization nesting, postage statements, postage adjustments, postage status query information, piece detail and piece ranging and many other business process related communications. Refer to A [Guide to Intelligent Mail for Letters and Flats](#) for more information on full-service. Mail.dat: Mail.dat is an industry-defined database structure consisting of files linked by key fields. The Mail.XML specification enables secure electronic submission of mailing information to the Postal Service using eXtensible Markup Language (XML) messaging technology. Refer to the IDEAlliance Mail.dat specifications at <http://www.idealliance.org/> for the industry standard technical specifications for Mail.dat and Mail.XML.

The Postal Wizard is the third method for submitting electronic documentation, besides Mail.dat and Mail.XML. The Postal Wizard (PW) uses a secure protocol for online submission of postage statements for mailings (refer to *A Guide to Intelligent Mail for Letters and Flats*, section 3.16 Postal Wizard). The *PostalOne!* system generates postage statements from data sent electronically through the Postal Wizard but is restricted to mailings of fewer than 10,000 pieces. See Section 4 for more information on the Postal Wizard.

eDoc when used with the Intelligent Mail barcode, makes it possible to use the mail in a smarter way. The IMb used on mailpieces, handling units (trays and sacks) and containers—facilitates feedback about mailpieces and allows for mail-delivery service measurement.

1.5 Intelligent Mail Services

Intelligent Mail services currently include the full-service and basic automation options. Under the basic automation option, the Intelligent Mail barcode contains routing information for the delivery address but does not need to uniquely identify the mailpiece. Mailers interested in the basic automation option are not currently required to submit mailing documentation such as postage statements and qualification reports electronically, but may choose to under the basic automation option.

Under full-service, mailers are required to submit their postage statements and mailing documentation electronically to the USPS *PostalOne!* system using one of the following three methods: Postal Wizard, Mail.dat, or Mail.XML.

All customers interested in testing any of the electronic documentation (eDoc) methods, FAST or Data Distribution in TEM must be registered Business Customer Gateway users. Refer to new full-service TEM requirements in the document on RIBBS: [eDoc and Full-Service Authorization Guide for Mail.dat and Mail.XML](#).

Mailers who qualify for the full-service option can receive certain benefits, including start-the-clock information and address-correction information for qualified letters and flats that are endorsed as specified for OneCode ACS. Default ACS profiles for new MIDs must be changed if a mailer wants other than default services. Refer to *A Guide to Intelligent Mail for Letters and Flats*: comprehensive information on basic automation and full service on RIBBS and for OneCode ACS specific instructions. In addition to these benefits, the Postal Service provides lower rates to mailers that implement the full-service option.

As Intelligent Mail program matures, the Gateway will evolve to support an expanded suite of services, tools and resources. Intelligent Mail components are shown in Table 1 below.

Intelligent Mail Components	Gateway Access
Full-Service Information	Intelligent Mail Services
Mailer ID: apply & manage	Mailer ID
Full-Service Data Distribution	Mailer ID
Barcode Tray Labels Ordering	Customer Label Distribution List (CLDS)
Customer Supplier Agreements	Customer/Supplier Agreements (CSAs)
Mail.dat and Mail.XML	Electronic Data Exchange (<i>PostalOne!</i>)
Test Environment for Mailers	Electronic Data Exchange (<i>PostalOne!</i>)
FAST Appointments	Schedule a Mailing Appointment (FAST)
eInduction	Mailing Reports (<i>PostalOne!</i>)
Full-Service Reports	Mailing Reports (<i>PostalOne!</i>)
Push / Pull Full-Service Feedback	Mailing Reports (<i>PostalOne!</i>)

Table 1 Gateway links

2. Navigating the Business Customer Gateway

2.1 Getting Started

The Business Customer Gateway is available to all business customers. The Business Customer Gateway landing page (Figure 2-2) offers information on the services available as well as general information and customer support links that are useful to mailers and mail service providers. The Gateway homepage also presents task-oriented links which are now referred to as services. Once you are granted access to these services, you can access the services through your Business Customer Gateway homepage.

2.2 The USPS.com Web site

The United State Postal Service (USPS) official Web site, <http://www.usps.com> provides a direct link to the Business Customer Gateway. The Business Customer Gateway link is located at the bottom right corner of USPS.com (Figure 2-1). Selecting this link takes you to the Business Customer Gateway login page (Figure 2-2). (If you are already logged into the Gateway, clicking the link takes you to a home page, Figure 2-3)



Figure 2-1: USPS.com – Business Customer Gateway link

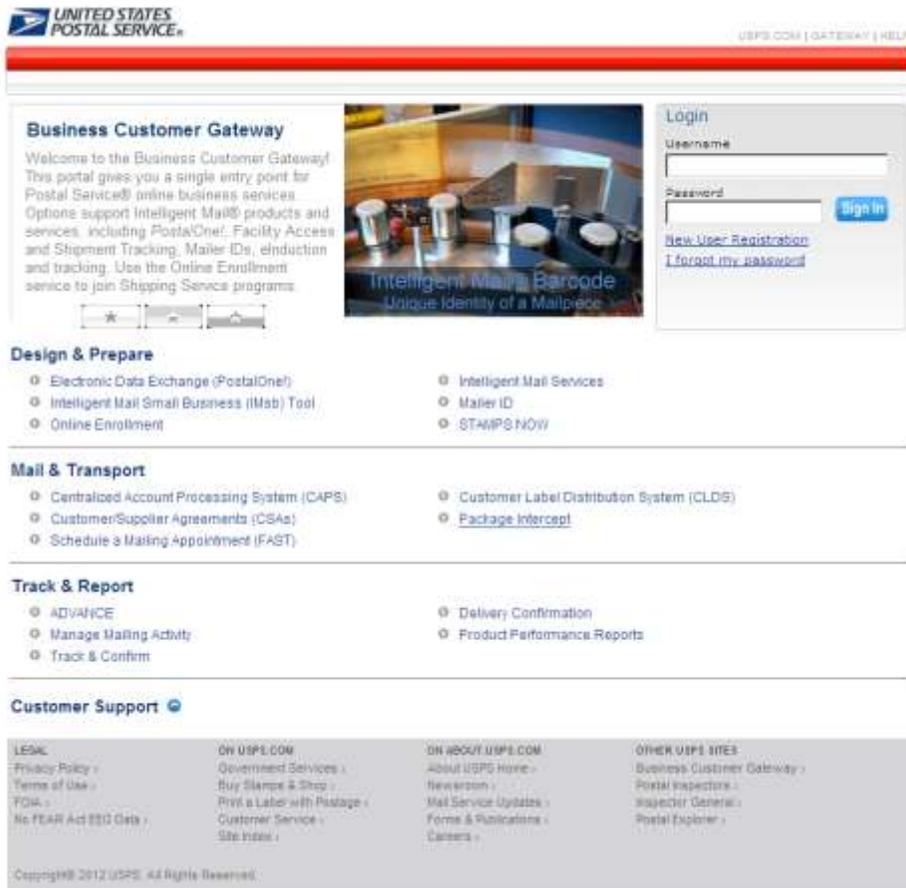


Figure 2-2: Business Customer Gateway Landing Page

All postal business customers log on to the new Business Customer Gateway through a single sign on using Gateway usernames and passwords to access all online services. Customer profiles are integrated across all USPS services and applications. Through the Business Services Administrator (BSA) role -- user who has the responsibility of granting Gateway service access to affiliated users —customers get approval to access Business Customer Gateway services. Refer to section 2.8 on the Business Services Administrator for more detailed information.

If you have questions, problems accessing your accounts, or submitting electronic documentation, the Gateway *PostalOne!* Help Desk is available at 1-800-522-9085.

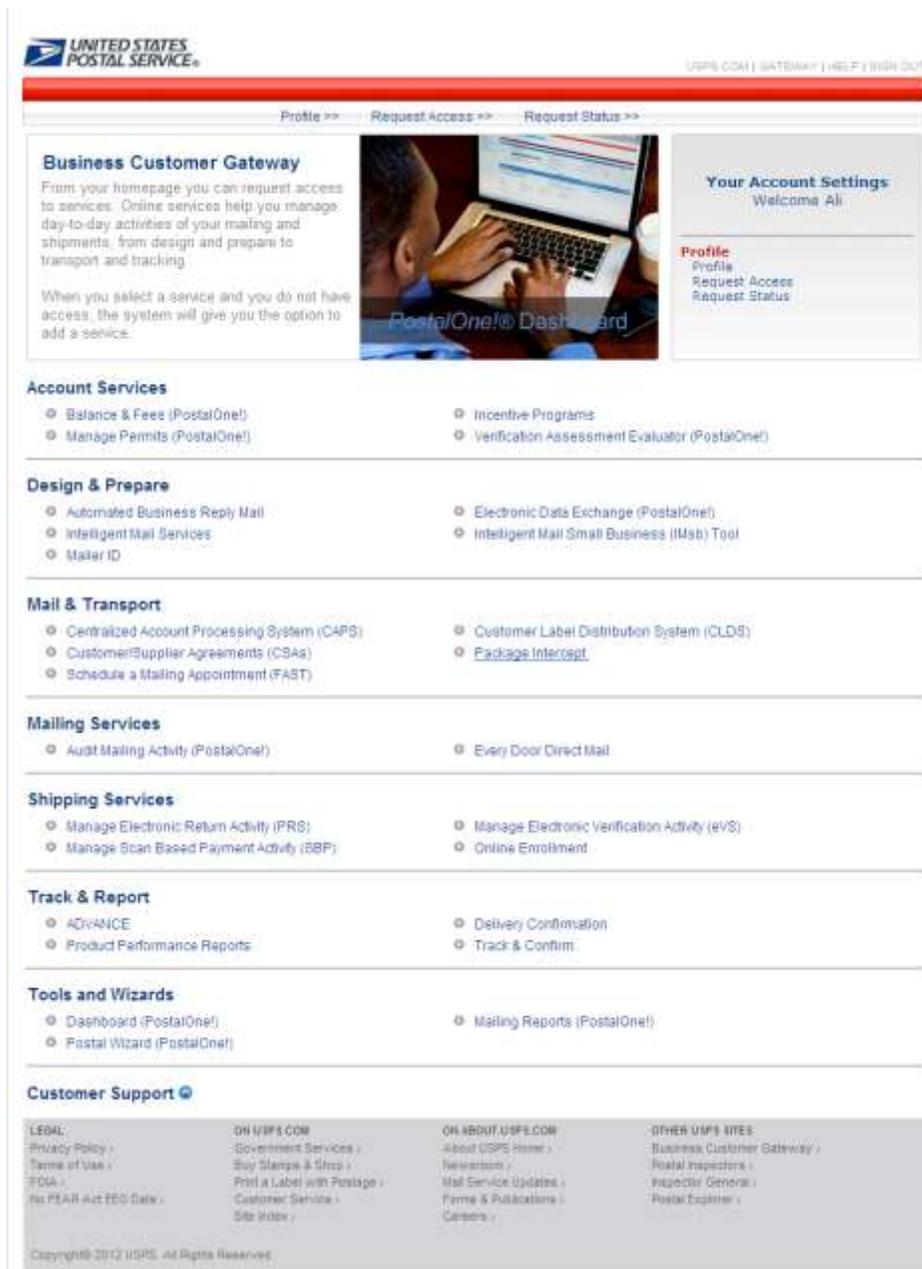


Figure 2-3: Gateway user homepage – the user is signed in.

Navigational Links appear on the top right of most Gateway pages, as well as inside of services (such as *PostalOne!* Mailing Reports).

On the BCG:

- **USPS.COM** on the Business Customer Gateway returns the user to USPS.COM
- **GATEWAY** returns a user to the Business Customer Gateway Signed In page.
- **HELP** on the Business Customer Gateway takes the user to the USPS.COM Customer Service page.
- **SIGN OUT** returns a user to the Business Customer Gateway Sign In page.

Inside a Service (such as *PostalOne!* Mailing Reports):

- **HOME** returns the user to the Business Customer Gateway.
- **HELP** inside a *PostalOne!* service opens the online Help system.
- **SIGN OUT** returns a user to the Business Customer Gateway Sign In page.

Customer Support section of the Business Customer Gateway provides direct links to online resources (Figure 2-3).

- National Customer Support Center – RIBBS®
- Service Updates
- ePubwatch
- Business Service Network (BSN) eService
- Gateway Help Desk
- Message Center

2.3 Customer Registration ID (CRID)

2.3.1 Overview

The Customer Registration ID (CRID) is a 15-digit maximum identifier created by the customer registration system to uniquely identify a USPS Customer at a business location address. For each unique combination of company name and physical address, the USPS will create a new CRID to identify that customer and for associating customer data. The CRID is the single, unique ID that connects a company's information at a specific geographic location across all USPS applications. A CRID will be associated to every Permit Number and Mailer ID that is issued (there may be multiple Permit Numbers or MIDs associated to a single CRID).

CRIDs are assigned during the initial login at the Business Customer Gateway. If you are a new user ask your company Business Services Administrator (BSA) for the CRIDs or the exact address to enter for the business location you wish to be affiliated with. You can affiliate with a specific business location by entering the entity CRID. When requesting access to additional services at other locations, you can enter a specific CRID for additional locations you wish to gain access to after the initial new user registration.

CRIDs display in the profile Information link within the Business Customer Gateway. You can review CRID and user profile information by clicking the Profile link (Figure 2-4); business locations including the CRIDs associated to those locations will be presented (Figure 2-5).

2.3.2 By/For Identification

Both the Mail Owner and Mail Preparer are required to be identified in the electronic documentation of all full-service mailings. Mail Preparers have the option to use their CRID or their customer's CRIDs for identification in the By/For relationships in the eDoc. Mail Preparers who elect to use a CRID to identify a Mail Owner in their electronic documentation are advised to obtain the CRID from that Mail Owner. CRIDs are also used to determine the correct data recipients for full-service feedback (e.g., ACS, COA and nixie, start-the-clock, container visibility, and Full Service Data Quality reports). Refer to *A Guide to Intelligent Mail for Letters and Flats*, Section 3.7, for detailed information on full-service data distribution requirements and By/For identification.

CRIDs are also used to identify the business entity for authorization purposes, as part of the electronic data exchange Mail.XML feature. Full-service feedback for a given CRID can be viewed by mailers through the Business Customer Gateway. Mail owners or their delegate receive COA and Nixie information. Full-service start-the-clock and container visibility feedback is available via online reports or Web Services Mail.XML functionality to Mail Owners, Mail Preparers or to a business entity they delegate.

The USPS subsystems support CRID Create Request and Create Response message sets, supported in the new Mail.XML version. Mailers can query for a CRID for their own use or on behalf of mail owners. As part of the electronic data exchange Mail.XML feature, the *PostalOne!* system was enhanced to receive a Mailer's request messages and to respond back to the Mailer with a USPS response message. Mail.XML will have new elements added for the CRID request, response messages with USPS legal agreements added to the

messages. Refer to *A Guide to Intelligent Mail for Letters and Flats* for detailed information on the CRID Create Request/Response messaging.

2.3.3 User Profile Information

The user Profile Information is accessed through the “Profile” link (Figure 2-4). The page will display the user’s name, primary affiliation business name and address. The profile homepage contains two tables: one display Business Locations including the CRIDs associated to those locations and the other displays services for which you are affiliated (Figure 2-5). View features and privileges will depend on whether you are a regular user or BSA user.

The Profile link allows these self-service capabilities.

- edit your profile
- edit business location information
- remove a service (non-BSA only)
- view BSA Agreement (BSA only)

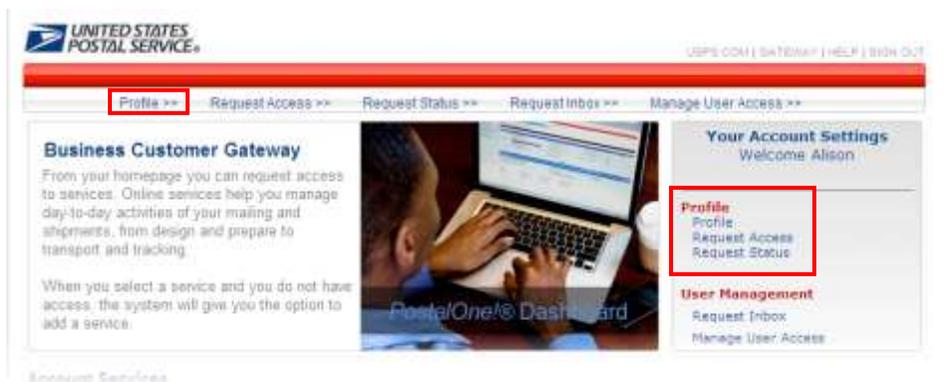


Figure 2-4: Access to a user’s profile information

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

Profile Information

Welcome Ali, your current user profile and affiliated business locations are shown below.

User Information

Name: Ali
 Company Name: BCG SIT Test
 Address Line 1: 475 LENFANT PLZ SW
 City: WASHINGTON
 ZIP / Postal Code: 20260-0004
 State / Province: DC
 Country: UNITED STATES
 Email:
[Edit User Profile](#)
[View BSA Agreement](#)

If you need to edit the profile information for one of your associated business locations just click on the Business Name link.

Business Locations

Business Name	CRID	Address	City	State/ Province	ZIP/Postal Code
BCG SIT Test	20166637	475 LENFANT PLZ SW	WASHINGTON	DC	20260-0004

One Business found.

To remove access to one or more services, select the associated check boxes and click the Remove Service button. If you are the BSA for a service, you must instead call the Help Desk to remove your access to that service.

Services

	Service	Business Name	Address	BSA Status
<input type="checkbox"/>	Balance & Fees (PostalOne)	BCG SIT Test	475 LENFANT PLZ SW	Yes
<input type="checkbox"/>	Dashboard (PostalOne)	BCG SIT Test	475 LENFANT PLZ SW	Yes
<input type="checkbox"/>	Electronic Data Exchange (PostalOne)	BCG SIT Test	475 LENFANT PLZ SW	Yes
<input type="checkbox"/>	Mailing Reports (PostalOne)	BCG SIT Test	475 LENFANT PLZ SW	Yes
<input type="checkbox"/>	Manage Mailing Activity	BCG SIT Test	475 LENFANT PLZ SW	Yes
<input type="checkbox"/>	Manage Permits (PostalOne)	BCG SIT Test	475 LENFANT PLZ SW	Yes
<input type="checkbox"/>	Postal Wizard (PostalOne)	BCG SIT Test	475 LENFANT PLZ SW	Yes

Displaying all Services.

[Remove Service](#)

Figure 2-5: Profile Information screen

On the Profile Information page, you have options to edit your own profile. When you need to change company information, use the link for the business name. If you are the Business Service Administrator (BSA) you will have enhanced user options to manage affiliated business entities under the company umbrella. See section 2.8 for more information on the Business Services Administrator.

2.4 Managing Permits

The Manage Permits link allows you to manage the permits to which you are associated (Figure 2-6). When you click the Manage Permits link, you will be directed to the Associated Business Entities screen that displays the business entities linked to you (Figure 2-7).

UNITED STATES POSTAL SERVICE® USPS.COM | GATEWAY | HELP | SIGN OUT

Profile >> Request Access >> Request Status >>

Business Customer Gateway
From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.

Your Account Settings
Welcome Ali

Profile
Profile
Request Access
Request Status

Account Services

- Balance & Fees (PostalOne!)
- Manage Permits (PostalOne!)**
- Incentive Programs
- Verification Assessment Evaluator (PostalOne!)

Design & Prepare

- Automated Business Reply Mail
- Intelligent Mail Services
- Mail ID
- Electronic Data Exchange (PostalOne!)
- Intelligent Mail Small Business (IMsb) Tool

Mail & Transport

- Centralized Account Processing System (CAPS)
- Customer/Supplier Agreements (CSAs)
- Schedule a Mailing Appointment (FAST)
- Customer Label Distribution System (CLDS)
- Package Interogit

Mailing Services

- Audit Mailing Activity (PostalOne!)
- Every Door Direct Mail

Shipping Services

- Manage Electronic Return Activity (PRS)
- Manage Scan Based Payment Activity (BBP)
- Manage Electronic Verification Activity (eVS)
- Online Enrollment

Track & Report

- ADVANCE
- Product Performance Reports
- Delivery Confirmation
- Track & Confirm

Tools and Wizards

- Dashboard (PostalOne!)
- Postal Wizard (PostalOne!)
- Mailing Reports (PostalOne!)

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Figure 2-6: Users can access Manage Permits from their Gateway homepage.

Name	CEO	Address	City	State/Province	ZIP/Postal Code	Country
...	...	473 LEONARD PLZ SW	WASHINGTON	DC	20269-0004	UNITED STATES
...	...	5918 UNION RIDGE CT	ADAMSTOWN	MD	21710-9453	UNITED STATES
...	...	5653 BEAUMONT AVE	PHILADELPHIA	PA	19143-4700	UNITED STATES
...	...	1432 COUNTY LINE RD	HENTINGDON	VA	19098-1801	UNITED STATES

Figure 2-7: Associated Business Locations listing page from *Manage Permits* link

You can click a business name from the Associated Business Locations page to access the Business Entity Information page and tabs: Associated Business Locations, Permit Profile, Permit Validation, Contact Information and Manage Additional Info (Figure 2-8). The Permit Profile tab, when selected, displays all linked permits to the selected business entity.

The Permit Profile tab allows you to locate primary (Permit) accounts belonging to your business entity, validate ownership of additional permit accounts, and link them to your business entity.

The Permit Validation screen allows you to validate your access to permit accounts in the system. For validation, the system requires you to verify one of the last 10 transactions applied to the (Permit) account and other related account information before the you can access the permit account (Figure 2-9).

The Contact Information screen (Figure 2-10) allows you to update contact information for the selected business entity. The Manage Additional Info screen (Figure 2-11) allows you to manage additional business entity information.

The Business Service Administrator (BSA) is allowed to edit contact information for validated (Permit) accounts. Also the BSA is able to modify and delete all user-account linkages, including their own. By default, all users at a business entity will have access to all accounts for that business entity. It is up to the BSA to limit access to accounts viewing.

Associated Business Locations > Business Location Information

Manage Mailing Activity

Business Location Information

View and manage business location profile information.

Name:	ABOUT MAIL
CRID:	817731888
Address:	1432 COUNTY LINE RD
City:	HUNTINGDON VY
State/Province:	PA
ZIP-Postal Code:	19006-1801
Country:	UNITED STATES
Mail Facility ID:	19047-9999
Discounts and Rebates:	<input type="checkbox"/>
eVS Participant:	<input type="checkbox"/>
PRS Participant:	<input type="checkbox"/>
Web Service Enabled:	<input type="checkbox"/>

Permit Profile | Associated Business Locations | Permit Validation | Contact Information | Manage Additional Info

Permit Search Form

All the permits linked to the selected business location are displayed below the search form. Use the below search to find the specific permits within the displayed result set.

Permit No:	IS	
Permit Type:		
Permit City:	IS	
State:		
Permit ZIP:		
<input type="button" value="Search"/>		

All Permits Linked to the selected Business Location

Use the checkboxes below if you wish to extend or retract the viewing of permit account balance and fee information to any mailing agent presenting mail on your behalf. Please confirm your selections using the Update View Status button.

Extend Balance and Fees	Permit No	Permit Type	PO of Mailing	Owner Name	Address	Permit Status	Finance No
<input type="checkbox"/>	81	PI	LANGHORNE PA 19047	ABOUT MAIL	1432 COUNTY LINE RD HUNTINGDON VALLEY, PA 19006-1801 UNITED STATES	ACTIVE	414444

Figure 2-8: Business Locations Information screen

Associated Business Locations > Business Location Information

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

Business Location Information

View and manage business location profile information.

Name:	ABOUT MAIL
CRID:	30732888
Address:	1432 COUNTY LINE RD
City:	HUNTINGDON VY
State/Province:	PA
ZIP/Postal Code:	19006-1801
Country:	UNITED STATES
Mail Facility ID:	19047-9999
Discounts and Rebates:	<input type="checkbox"/>
eVS Participant:	<input type="checkbox"/>
PRS Participant:	<input type="checkbox"/>
Web Service Enabled:	<input type="checkbox"/>

- Permit Profile
- Associated Business Locations
- Permit Validation**
- Contact Information
- Manage Additional Info

Permit Validation

You may validate your access to permit accounts currently in the system. Please enter the exact Account Number, Account Type, Post Office of Mailing ZIP Code, and the exact dollar value of one of last 10 transactions performed on that account. After successful authentication the permit account will be linked to your currently selected business location and will be visible on the Permit Profile tab.

[Click here](#) to see additional information on permit validation rules.

*Required

*Account (permit/publication) Number:	
*Account Type:	(Please Select) ▾
*Post Office of Mailing ZIP Code:	
*Amount of one of last 10 transactions on this account:	
<input type="button" value="Validate"/>	

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Figure 2-9: Permit Validation screen

Associated Business Locations > Business Location Information

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

Business Location Information

View and manage business location profile information.

Name:	ABOUT MAIL
CRID:	30732888
Address:	1432 COUNTY LINE RD
City:	HUNTINGDON VY
State/Province:	PA
ZIP/Postal Code:	19006-1801
Country:	UNITED STATES
Mail Facility ID:	19047-9999
Discounts and Rebates:	<input type="checkbox"/>
eVS Participant:	<input type="checkbox"/>
PRS Participant:	<input type="checkbox"/>
Web Service Enabled:	<input type="checkbox"/>

- Permit Profile
- Associated Business Locations
- Permit Validation
- Contact Information**
- Manage Additional Info

Contact Information

Edit the primary contact information for the currently selected business location.

*Required

*First Name:	Jane
*Last Name:	Smith
*Telephone:	703-268-8000
*Email:	jane.c.smith@smithperfectmailings.com
<input type="button" value="Save"/>	

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Figure 2-10: Contact Information screen

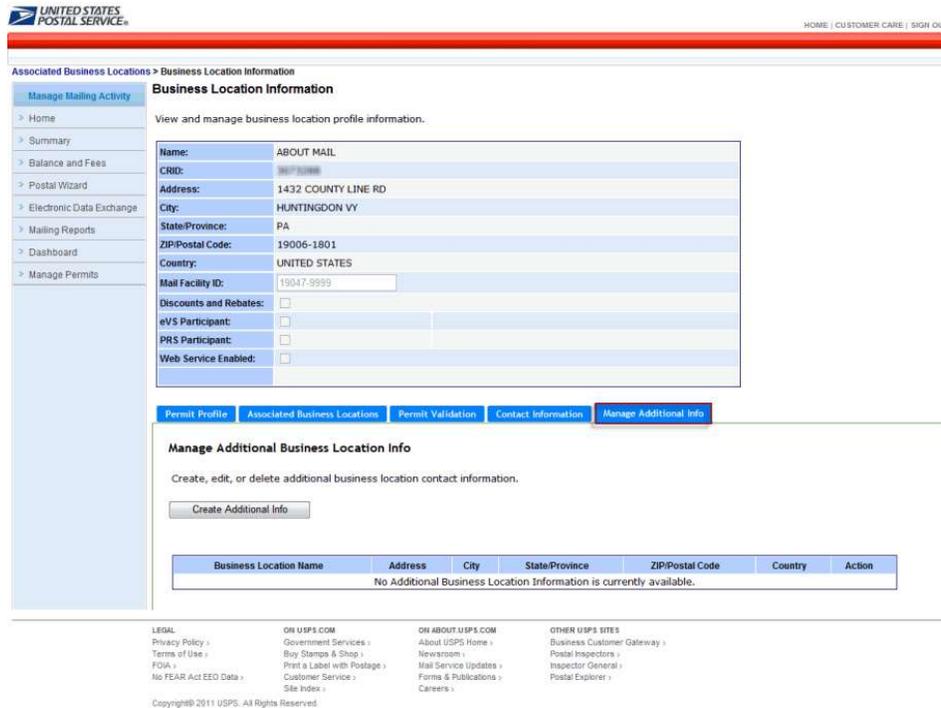


Figure 2-11: Manage Additional Info screen

2.5 New Users

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

New users register at the Gateway by clicking on the New Users Registration Link (Figure 2-12). During the initial sign up, you will create a username and password (Figure 2-13). You should receive a confirmation email from the USPS of the username and account type. During the initial sign up, you will be prompted to continue with the online process and request an online service. This new user sign-up and customer registration is now the standard process for all USPS online users.

By default, the system will set up a *Business* account profile when you register as a new user on the Business Customer Gateway. If you are interested in USPS retail products and services, you can register via USPS.com and select the *Personal* account type but are also required to register through this system. *Personal* accounts are directed to USPS.com after registration. You can hold both a personal and business account, but are required to use the assigned username and password for accessing the different accounts.

Business Customer Gateway

Welcome to the Business Customer Gateway! This portal gives you a single entry point for Postal Service® online business services. Options support Intelligent Mail® products and services, including PostalOne!, Facility Access and Shipment Tracking, Mailer IDs, induction and tracking. Use the Online Enrollment service to join Shipping Service programs.



Intelligent Mail® Barcode
Unique Identity of a Mailpiece

Login

Username

Password

[Sign In](#)

[New User Registration](#)
[Forgot My Password](#)

Design & Prepare

- [Electronic Data Exchange \(PostalOne!\)](#)
- [Intelligent Mail Small Business \(IMsb\) Tool](#)
- [Online Enrollment](#)
- [Intelligent Mail Services](#)
- [Mailer ID](#)
- [STAMPS NOW](#)

Mail & Transport

- [Centralized Account Processing System \(CAPS\)](#)
- [Customer/Supplier Agreements \(CSAs\)](#)
- [Schedule & Mailing Appointment \(FAST\)](#)
- [Customer Label Distribution System \(CLDS\)](#)
- [Package Intercept](#)

Track & Report

- [ADVANCE](#)
- [Manage Mailing Activity](#)
- [Track & Confirm](#)
- [Delivery Confirmation](#)
- [Product Performance Reports](#)

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Figure 2-12: The Gateway sign up for new users

Create Your USPS.com Business Account

Account type

• Business

Create a username & password

* Indicates a required field

***Pick a Username**
Usernames need 6 characters. You can use your email address.

[CHECK THIS NAME](#)

***Pick a Password**
Passwords need 7 characters, including a letter and number. They are case-sensitive. They can include special characters, but not your username or more than two repeat characters in a row.

Password

Password Strength 0% Too Short

Re-Type Password

***Pick Two Security Questions**
Please answer two secret questions. If you forget your password, you will be asked for this information to re-gain access to our site.

***Pick Your First Security Question**

Select

Your Answer
Answer as not case-sensitive

Re-Type Your Answer

[CONFIRM FIRST SECURITY ANSWER](#)

Next, we need your name and contact info

* Indicates a required field

Enter Your Name

Title

*First Name MI. *Last Name

Suffix

Enter Your Address

*Country

*Company Name

*Street Address

App/Suite/Other

*City

*State *ZIP Code**

Enter Your Phone Number

*Type *Phone Ext.

Type Fax

Enter Your Email Address

*Re-Type Your Email Address

Can we contact you?
Get communications from USPS and our partners.

From USPS
 From USPS Partners

Please read our privacy policy.

Privacy Act notice: The information you supply will be used to provide you online registration capability for internet-based services and to provide you with services. Certain information is required to provide the service. Collection of information for this service is authorized by 38 U.S.C. 421, 422, & 424. We do not disclose your information without your consent to third parties, except to facilitate the service. For more information or request to see details, contact us.

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Figure 2-13: Creating username and password is case-sensitive

Create Your USPS.com Business Account

Account type

Business

Create a username & password

* Indicates a required field

Pick a Username

Usernames need 6 characters. You can use your email address.

CHECK THIS NAME

Pick a Password

Passwords need 7 characters, including a letter and number. They are case-sensitive. They can include special characters, but not your username or more than two repeat characters in a row.

Password Strength
Too Short

Pick Two Security Questions

Please answer two secret questions. If you forget your password, you will be asked for this information to re-gain access to our site.

Pick Your First Security Question

Your Answer

Answer as not case-sensitive

Re-Type Your Answer

CONFIRM FIRST SECURITY ANSWER

Next, we need your name and contact info

* Indicates a required field

Enter Your Name

Enter Your Address

Enter Your Phone Number

Please read our privacy policy.

Privacy Act notice: The information you supply will be used to provide you online registration capability for internet-based services. Collection of information for this service is authorized by 38 U.S.C. 421, 422, & 424. We do not disclose your information without your consent to third parties, except to facilitate the service. For more information on our privacy policy, visit us online.

Create Account

Figure 2-14: Entering company information

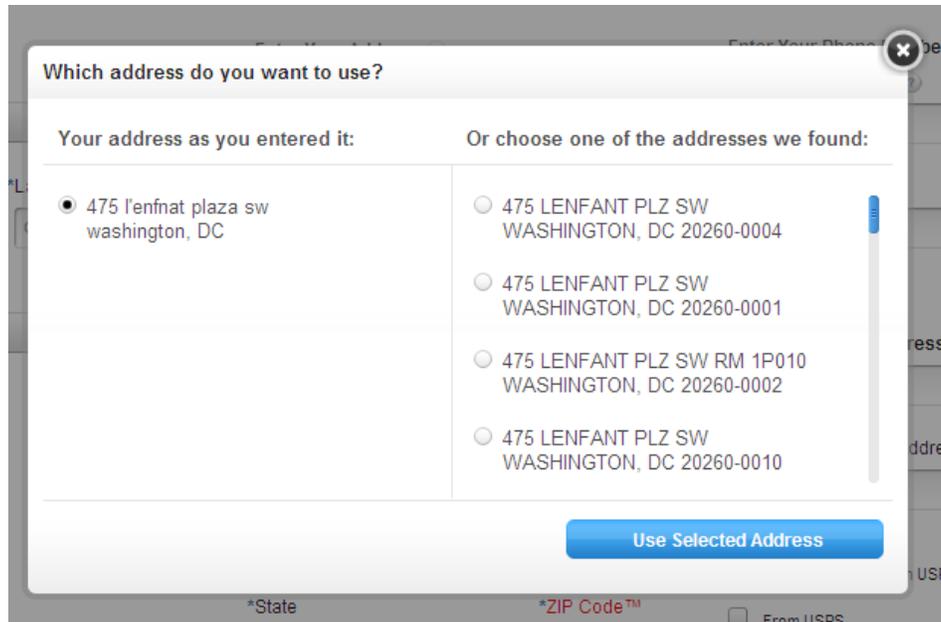


Figure 2-15: Confirming the Business Location

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

All fields marked with an asterisk (*) are required. Some fields are case-sensitive. The business location screen (Figure 2-15) appears when the Business Profile is submitted. The AMS queries standardized addresses that approximate the address entered; the system prompts you to confirm which address to apply. The system will send “new user confirmation” and “pending status” emails. For this reason, it is important to enter a valid email address and contact information correctly.

The Company Profile Summary screen appears when the contact and company information is entered and submitted. The system will allow you to select *Edit* or *Continue* within the same session. You can log back in and return at any time and edit Profile data as necessary.

This Privacy Act section (Figure 2-14) appears when the Company Profile information is fully entered. In order to continue, you must consent to the terms and conditions of the Privacy Act and select the *Continue* radio button.

2.6 Requesting a Business Service

A Business Service is a set of functions, which you can request access for through the Gateway request access process. A Business Service must be authorized before access is enabled. You can apply for a Business Service by selecting one of the service links from under one of the Business Service areas (Figure 2-16).

Certain services in the Request Access scheme are actually business service groupings i.e., multiple related services under one group heading. *Manage Mailing Activity* for example is a business service group, comprising individual services. Such services do not display individually on the Business Customer Gateway landing page, but display on your homepage.

The **Manage Mailing Activity** comprises the following supporting functions:

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

- Manage Permits

Note: The Audit Mailing Activity is a separate service and must be requested independently of the Manage Mailing Activity service. It is recommended that the BSA of the Manage Mailing Activity also assume the BSA role of the Audit Mailing Activity for optimum security access to mailing transaction information.

Your homepage (the first page that displays when you sign-in) will display the individual services that make up the Manage Mailing Activity group. If you select a service, and are not set up or approved for that service, the system will prompt you to add that service. Most services under the Gateway system require approval for access.

To add a service, you can either type in the service (then click the Submit button), or click a service link from under one of the business areas. You can also search for a service by selecting a filter from the Locate Service dropdown menu, then clicking the Submit button.

You can select the desired service during the online process, but are limited to requesting one service per request. Multiple locations can be added to the service request, and you must associate at least one business location to a service (Figure 2-17). If the service requires a Business Service Administrator (BSA) approval, the system will route your request to the BSA. If a BSA is not established in the system, you will be asked to assume the BSA role. Refer to section 2.8 for comprehensive information on the Business Service Administrator.

If your business account is set up and you have previously requested a service or wish to remain logged in to add additional services or additional locations for a service, follow the same process as a new user requesting a service by selecting the Request Access link.

[Profile >>>](#) [Request Access >>>](#) [Request Status >>>](#) [Request Inbox >>>](#) [Manage User Access >>>](#)

Select a Business Service

The Business Services that display on the Business Customer Gateway are grouped into categories. Click the details link next to the service to get more information. To apply for access to a Business Service, select one of the service links from the list below.

Participation in the following programs requires a user to request access to the **Mailer ID** and **Manage Mailing Activity** services, **IN ADDITION TO** the desired business service(s) below:

Every Door Direct Mail® (EDDM)
 Intelligent Mail® Small Business (IMsb) Tool
 Online Enrollment
 Package Intercept

To search for a specific service, enter a key word about that service and then click the **Submit** button for a customized result set.

Locate service where: contains:

- Small Business Services**
 - [Select Multiple Services](#) (details)
- Account Services**
 - [Incentive Programs](#) (details)
 - [Verification Assessment Evaluator \(PostalOne!\)](#) (details)
- Design & Prepare**
 - [Intelligent Mail Small Business \(IMsb\) Tool](#) (details)
 - [Mailer ID](#) (details)
- Mail & Transport**
 - [Customer Label Distribution System \(CLDS\)](#) (details)
 - [Customer/Supplier Agreements \(CSAs\)](#) (details)
 - [Package Intercept](#) (details)
 - [Schedule a Mailing Appointment \(FAST\)](#) (details)
 - [Transportation Location Service \(TLS\)](#) (details)
- Mailing Services**
 - [Audit Mailing Activity \(PostalOne!\)](#) (details)
 - [Every Door Direct Mail](#) (details)
- Shipping Services**
 - [Manage Electronic Return Activity \(PRS\)](#) (details)
 - [Manage Electronic Verification Activity \(eVS\)](#) (details)
 - [Manage Scan Based Payment Activity \(SBP\)](#) (details)
 - [Online Enrollment](#) (details)
- Track & Report**
 - [Manage Mailing Activity](#) (details)
- Tools and Wizards**
 - [Sample Service 1](#) (details)

Figure 2-16: Selecting a Business Service

Once a service is selected, select the business location you wish to be associated. The New Business location button is used to add a business location to your profile (Figure 2-17). Business locations previously entered will display and you must make a selection by clicking the checkbox to the left of the location and then select the Next button.

[Profile >>](#) [Request Access >>](#) [Request Status >>](#)

Select Business Locations

Select at least one business location to associate to a service. This enables you to access the data for that business location.

You have selected the following online service:

Service
 [Manage Mailing Activity](#) [\(details\)](#)

When using this service, you will be linked with the business locations you add to your user profile. If you would like to be linked with a business location that is not shown in the table below, click the **Add Location** button to add a new location to your profile.

After you have entered all of the desired business locations, attach them to the business service by selecting the check box next to each business name, and then click the **Next** button.

Click the **Cancel** button to return to the previous screen.

[Add Location](#)

Existing Business Locations

	Business Name	CRID	Address	City	State/ Province	ZIP/ Postal Code
<input checked="" type="checkbox"/>	Smith Perfect Mailings	94538264	200 MONTGOMERY ST STE 200	SAN FRANCISCO	CA	94104-3401

[Cancel](#)

[Next >](#)

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Figure 2-17: Associating the service to a business location

Figure 2-18: Entering an additional business location – by entering the CRID

If you select the New Business Location button, the Add a Service screen appears (Figure 2-18). You have the option to enter a CRID in the text box (if it is known) then check the radio button. If the entered CRID is not valid, the system returns an error message. If multiple addresses are found, a Multiple Addresses Found page will display.

If you know your CRID you can enter it to ensure you will be affiliated to a service for that specific entity (Figure 2-18). Users can input a specific CRID for additional locations they wish to gain access to after the initial new user registration. Entering a business name where the address is slightly different from what has been previously captured by the system, a different Customer Registration ID (CRID) may unintentionally be assigned to you and you will not be linked to the business entity for the desired location. Your Business Service Administrators can make a business affiliation correction for you. Refer to Section 2.8 for more information on Business Service Administrator role.

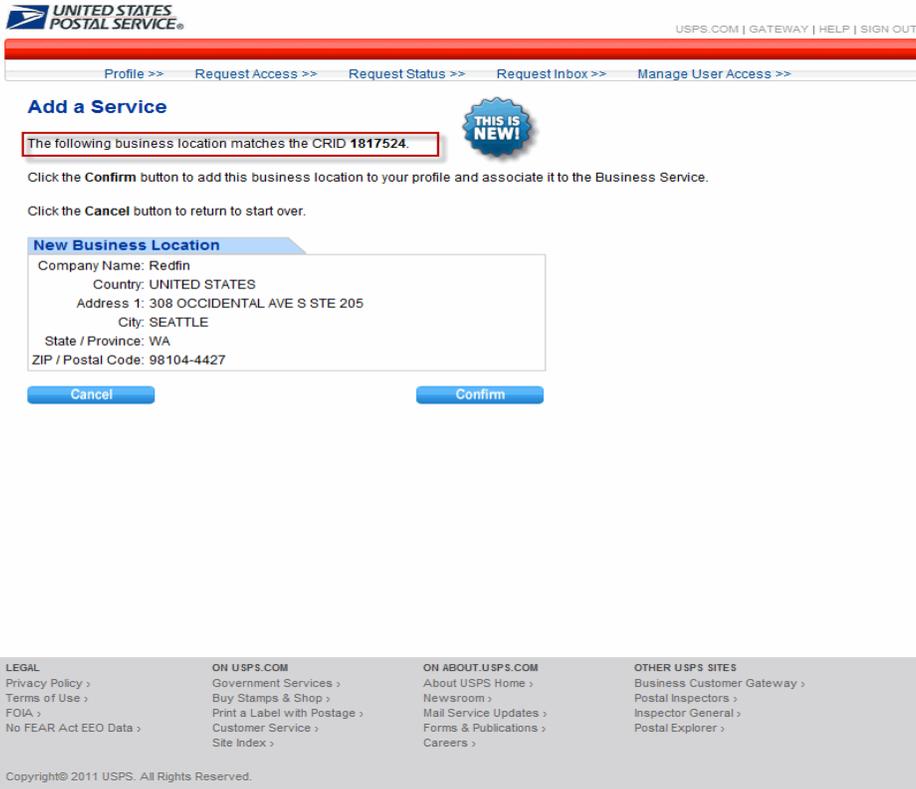


Figure 2-19: Confirmation of new business location

The alternative to entering the CRID requires you to enter the business name and address information. Upon selecting the *Continue* button, a confirmation page displays the location being added and the business location(s) for that service. The CRID associated to the business location also displays on the confirmation screen. Upon selecting the **Confirm** button, a confirmation page displays the service being requested and the business location(s) for that service (Figure 2-19).

The hard copy Electronic Data Exchange / Participation agreement has been replaced by an electronic Terms & Conditions, click through agreement that you must accept for the Business location (Figure 2-20). If a service requires a Business Services Administrator, the system checks to see if the BSA has been designated. If there is no BSA designee, you will be notified of the BSA requirement and will be prompted to assume the BSA role (Figure 2-21). If you agree to become the BSA you must consent to the BSA agreement by checking the checkbox and the request access process continues. If you decline your request for service access will go into a pending status until the BSA role is assumed for this service at the business location for which you are requesting access (Figure 2-22). The request is held in pending status, after which it is automatically denied if not approved within 25 days of the initial request. You can review the status of your request through the Request Status link (Figure 2-23).

Note on Contingent Services: In certain cases, access to one service is **contingent on** access to another service. For information on this relationship, please see **Section 2.9**.

Business Service Administrator Approval

The Business Service Administrator (BSA) role must be in place to manage requests for access to a business location(s).

Click the **No Thanks** button if you do not want to assume the BSA role. Your request for access will be placed in a queue until the BSA role is filled. The BSA for this location will act on all requests for access to this Business Service.

Please review the following Terms and Conditions:

CONTENTS

- Section 1 GENERAL
- Section 2 TRANSACTION TERMS
- Section 3 USPS OBLIGATIONS
- Section 4 PARTICIPANT OBLIGATIONS
- Section 5 PARTICIPANT LIABILITY
- Section 6 GENERAL TERMS AND CONDITIONS
- Section 7 PRIVACY ACT
- Section 8 USER RESPONSIBILITY STATEMENT
- Section 9 EXECUTION

This Agreement entered into between the United States Postal Service®("Postal Service" or "USPS") and Participant describes the terms and conditions pertaining to the Participant's participation in and use of Postal Service computer systems as described and authorized by the USPS. These terms and conditions are subordinate to, and do not supersede, any provisions of the Domestic Mail Manual (DMM™) or any other regulations or rulings of the USPS applicable to

By selecting this box, I agree to the USPS Online Agreement.

Please select which of the following companies for which you wish to become the BSA:

	Business Name	CRID	Address	City	State/Province	ZIP/Postal Code
<input type="checkbox"/>	Smith Perfect Mailings	94538264	200 MONTGOMERY ST STE 200	SAN FRANCISCO	CA	94104-3401
<input type="checkbox"/>	Redfin	1817524	308 OCCIDENTAL AVE S STE 205	SEATTLE	WA	98104-4427

Figure 2-20: Electronic Terms and Conditions click through agreement

Business Service Administrator Approval

The Business Service Administrator (BSA) role must be in place to manage requests for access to a business location(s).

Click the **No Thanks** button if you do not want to assume the BSA role. Your request for access will be placed in a queue until the BSA role is filled. The BSA for this location will act on all requests for access to this Business Service.

Please review the following Terms and Conditions:

Section 8 USER RESPONSIBILITY STATEMENT

User Responsibility Agreement Statement: I am responsible for the logon/logoff, all actions pertaining to the use of my assigned logon ID, and will not provide my logon ID to another person. Access to computer data or files not authorized to me is prohibited. My logon ID may be suspended indefinitely if I violate security procedures. Misuse of a USPS computer system may result in disciplinary action and/or criminal prosecution. I understand that any detected misuse of a computer system will be reported to the U.S. Postal Inspection Service. The Postal Service reserves the right to monitor network traffic to identify unauthorized attempts to upload or change information, or otherwise cause damage. The Privacy Statement has been read before signing this Agreement.

Section 9 EXECUTION

(Execution is via an online acceptance in the Gateway)

By selecting this box, I agree to the USPS Online Agreement.

Please select which of the following companies for which you wish to become the BSA:

	Business Name	CRID	Address	City	State/ Province	ZIP/ Postal Code
<input type="checkbox"/>	Smith Perfect Mailings	94538264	200 MONTGOMERY ST STE 200	SAN FRANCISCO	CA	94104-3401
<input type="checkbox"/>	Redfin	1817524	308 OCCIDENTAL AVE S STE 205	SEATTLE	WA	98104-4427

No Thanks

Print

Yes

<p>LEGAL</p> <p>Privacy Policy ></p> <p>Terms of Use ></p> <p>FOIA ></p> <p>No FEAR Act EEO Data ></p>	<p>ON USPS.COM</p> <p>Government Services ></p> <p>Buy Stamps & Shop ></p> <p>Print a Label with Postage ></p> <p>Customer Service ></p> <p>Site Index ></p>	<p>ON ABOUT.USPS.COM</p> <p>About USPS Home ></p> <p>Newsroom ></p> <p>Mail Service Updates ></p> <p>Forms & Publications ></p> <p>Careers ></p>	<p>OTHER USPS SITES</p> <p>Business Customer Gateway ></p> <p>Postal Inspectors ></p> <p>Inspector General ></p> <p>Postal Explorer ></p>
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Figure 2-21: Business Service Administrator (BSA) role option

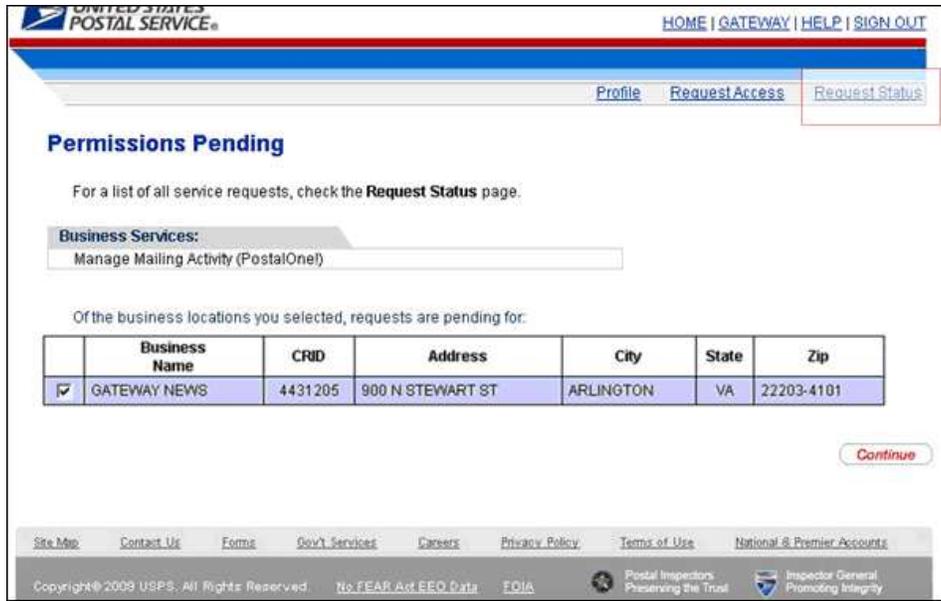


Figure 2-22: A request is placed in the pending queue without a BSA designated

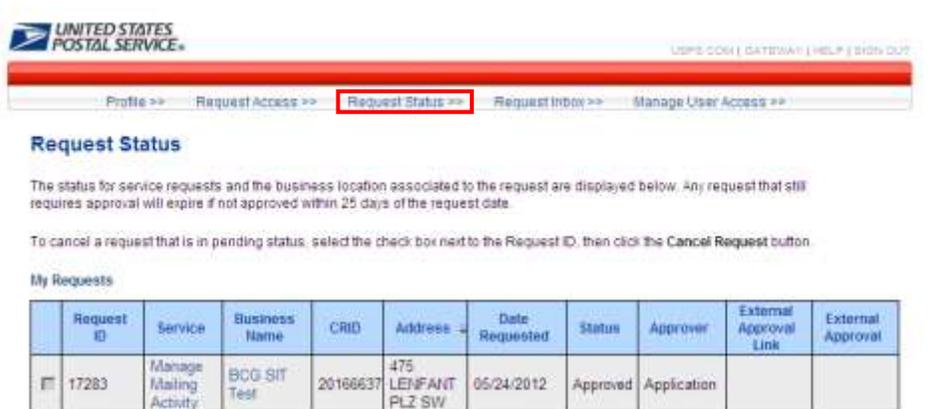


Figure 2-23: To review statuses of your requests, click the Request Status link

2.7 Requesting a Service through the *PostalOne!* Help Desk

Under certain conditions you may need to engage the *PostalOne!* Help Desk. The *PostalOne!* Help Desk can request a service for or grant BSA status on behalf of a registered business user. The requesting user can cancel a request made on their behalf via the Request Status link.

If a BSA already exists for a service, the user's request for BSA status is changed to a request for service access, and the request is routed to the BSA. When engaging the Help Desk there will be more stringent processing to validate a requesting user's *PostalOne!* permissions, affiliations, and other authentications before a requesting user will be granted the desired access.

In the case where the user has all the required approvals, the Help Desk creates an approved request. In the case where a BSA is assigned, an email notification to the BSA is sent and the request for access to the service is placed in pending until the BSA approves. In the case where there is no BSA for the chosen service and a user is requesting BSA Status, the Help Desk can implement the request. If the requesting user is not a BSA when the BSA status request is made on their behalf, the "Request Inbox" link will become visible in that user's profile. The user may then click on the "Request Inbox" link to view and accept the BSA agreement. The BSA agreement must be accepted before the BSA status is granted for any user assuming the BSA role. A pending BSA Agreement email request will be sent to the user's Request Inbox. When a

requesting user accepts the BSA agreement, the “Request Inbox” and “Manage User Access” links will be added to their profile.

Note that the BSA status request will change to service access for a requesting user if another user becomes the BSA first. As with the current request access system, an email stating whether the user’s access request has been approved, denied, or expired will be sent to the user when the required actions occur.

2.8 Business Services Administrator

The Site Administrator role has been replaced by the augmented Business Service Administrator (BSA) role. In the BSA Gateway hierarchy, there is a primary BSA and an assigned BSA. The primary BSA has the ultimate responsibility for all business services for its company, which in the new Gateway system may have one or many business entities. Additionally, the primary BSA has administrator responsibilities for all requested Gateway services including managing access to them at one or more business entity. A primary BSA can initiate a request for service or access on behalf of a user and assign a user to a BSA role. Such BSAs are considered “assigned” BSAs who share BSA responsibilities but have lesser privileges than the primary BSA. An assigned BSA can act on requests as well as manage service access for users. They cannot appoint another user to the BSA role or revoke the original BSA’s service access or BSA permissions.

Most Gateway services require that the BSA role be filled first before a service can be enabled for access. When a USPS customer anticipates engaging in multiple Gateway business services requiring multiple users at different business entities, it is recommended to devise a forward thinking BSA strategy beforehand. Organizing the assignment of the BSA role early in the process of setting up a business account will enable smoother access to Gateway services.

The BSA: Things to Think About	
Most services require a BSA; users requesting access to a service will be required to wait until the BSA role is filled.	Simple Rule 1: Understand the role and timing of the BSA.
The first user requesting access to a service is prompted to assume the BSA role.	Simple Rule 2: Assign the BSA and have him be the first to request access to a service.
A BSA can be assigned to each business entity under the umbrella of one company.	Simple Rule 3: There is a primary and assigned BSA role, assign the primary BSA role to manage the assigned BSAs.
When a user enters an address for a business entity that is different than the one previously entered for the same entity, a new CRID will be assigned.	Simple Rule 4: If you intend to affiliate to a particular business entity, the assigned CRID should be obtained from your BSA.
By default all users at a business entity will have access to all accounts for that business entity.	Simple Rule 5: Understand the BSA user management tools and limit user privileges as appropriate.
For some programs, there is a contingency on the BSA approval of another service before you will have access to the service you want.	Simple Rule 6: Follow the prompts and wait for the BSA to give you approval. This will also allow you to become the BSA of the service you originally wanted.

Table 2: BSA considerations

2.8.1 BSA Assignment

The Gateway sign up process is such that the first user who requests access to a business service from a new business location is prompted to assume the BSA role. If this user elects to assume the BSA role, the Gateway system assigns this user to the primary BSA role. If this user declines to assume the BSA role, this user's request and thereafter all other users requesting service access will be placed in a pending mode until a user accepts the BSA role. Note that requests placed in pending mode are automatically denied if it is not approved within 25 days of the initial request.

If a primary BSA is already assigned, all users who follow that request access to a service at the same location will need to be granted or denied access by this current BSA.

The role of all BSAs is to activate, deactivate and assign appropriate access, as well as to continuously manage changes to granted users' access and privileges to services at differing locations. A BSA also sets up business profiles and establishes user-role-business entity designations. Only the primary BSA can assign a user to a BSA role. All BSAs must consent to the BSA Agreement (Figure 2-21 above).

A new user who elects to assume the BSA role will receive an email confirmation (or denial) of the BSA status (Figure 2-30). The BSA will have access to the user management features which is restricted to the

Business Service Administrator role. The feature allows BSAs to manage the domain of users that are associated to their assigned business location(s). The screens that follow simulate the general flow for a BSA approving a new user for a service. Refer to Figure 2-24 through Figure 2-28.

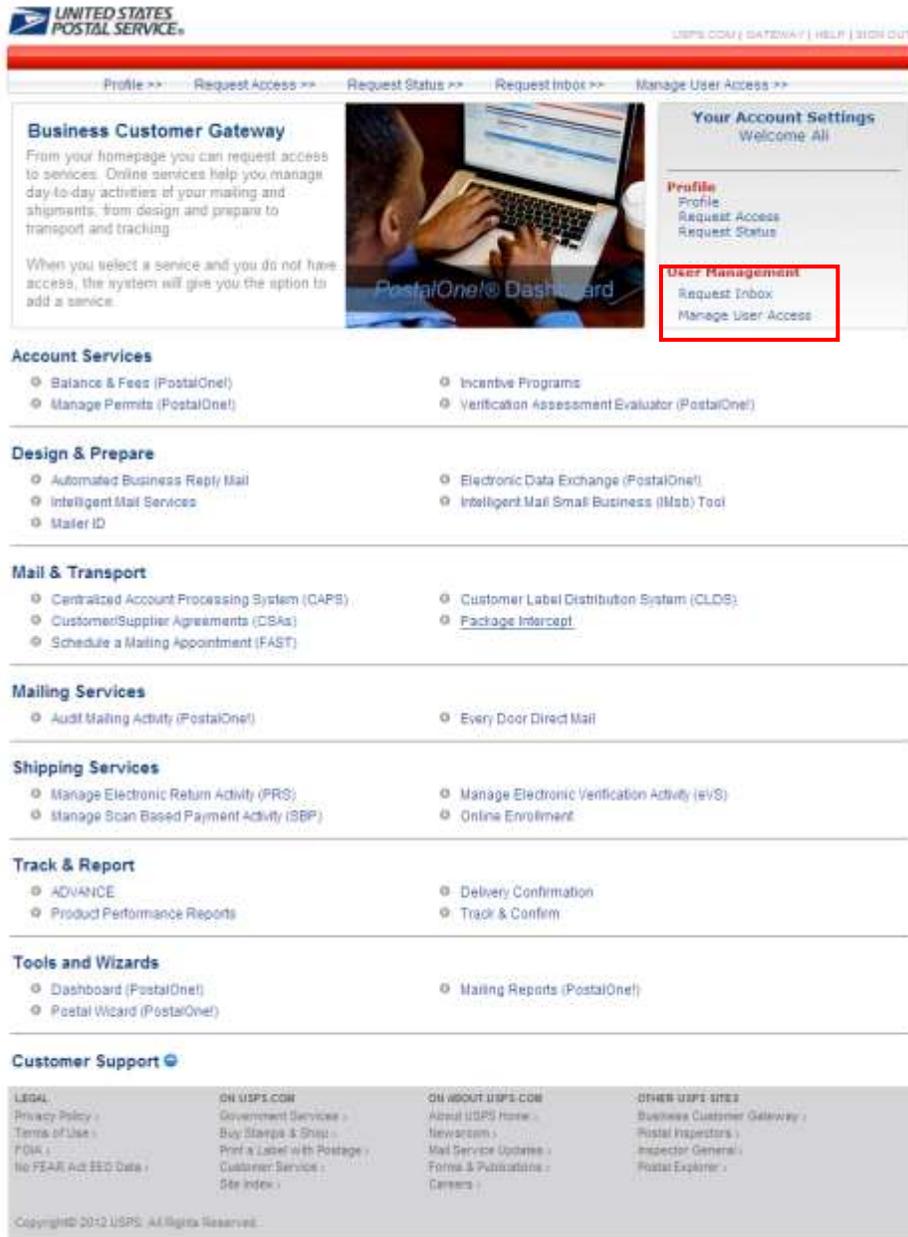


Figure 2-24: User Management functionality for BSAs only



Figure 2-25: Request InBox contains all Requests for Access to service and BSA request(s)

The Request Inbox displays all users' service access requests for which the BSA has the responsibility. The BSA selects a request by clicking the last name of the requester (Figure 2-25).

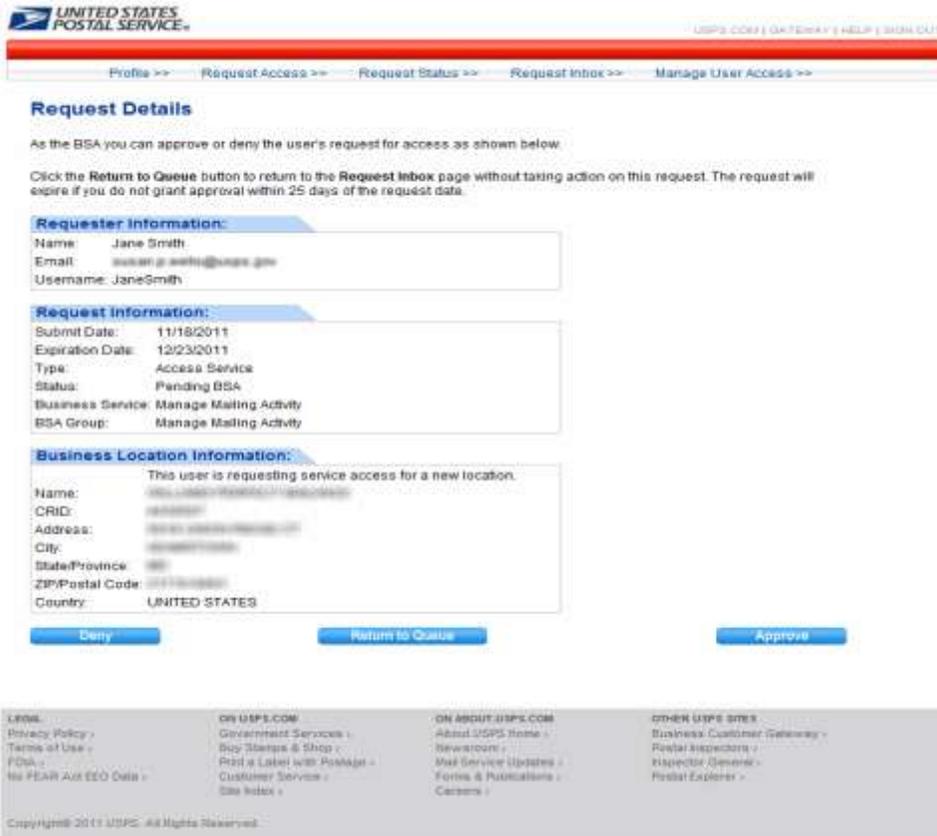


Figure 2-26: Request Details screen

When a BSA acts on a user request, the Request Details page displays (Figure 2-26). The BSA can **Approve**, **Deny**, or **Return to Queue** (no action is taken).

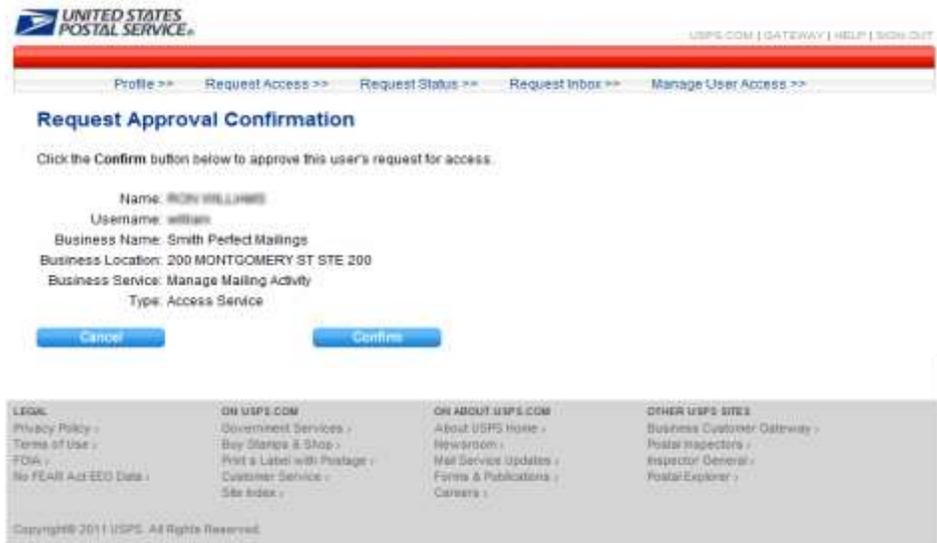


Figure 2-27: BSA Confirmation/Review screen

When an (Assign or Revoke) action is taken on a request, the BSA receives a confirmation screen to validate the action (Figure 2-27).

Manage User Access

To change the access levels for a user(s), select the corresponding check box next to the user that you would like to update. The system will then enable the **Revoke**, **Request Access** and **Assign** buttons.

To assign a Business Service Administrator (BSA) role to a user, select the corresponding check box, and then click the **Assign** button. The user who you assign will become a delegate BSA.

To request access for a user, select the corresponding check box, and then click the **Request Access** button.

To revoke a user's access to an online Business Service, select the corresponding check box, and then click the **Revoke** button.

Display users by Business Service:

Display users by Business Name:

	Current Level	Last Name	First Name	Service	Business Name	Business Location
<input type="checkbox"/>	User	WILLIAMS	RON	Manage Mailing Activity	Smith Perfect Mailings	200 MONTGOMERY ST STE 200

* Dependent Service

LEGAL: Privacy Policy, Terms of Use, FOIA, No FEAR Act EEO Data

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ON ABOUT.USPS.COM: About USPS Home, Newsroom, Mail Service Updates, Forms & Publications, Careers

OTHER USPS SITES: Business Customer Gateway, Postal Inspectors, Inspector General, Postal Explorer

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Figure 2-28: BSA User Access

BSA User Access allows BSA to assign, revoke and designate additional BSA roles and access. The Manage User Access feature allows BSAs the capability to create access to services and locations for their users, assign or revoke the BSA role for other users (Figure 2-28). Such users must already have access to the service at the location for which the BSA is assigned and can take action.

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

Table 3: Summary of user admin links and corresponding Gateway functions

2.8.2 Assuming the BSA Role

If you elect to assume the BSA role, the statement certification box must be checked, indicating your consent to the BSA Agreement. The BSA designation is required before for any user will be granted access to the service. You will be prompted to select the appropriate button: *No Thanks* (takes user to a Permissions Pending Screen – Figure 2-22). *Yes* (takes you to the BSA Agreement – Figure 2-21). Note that the Request Status screen appears if there is already a BSA designated (Figure 2-23).

You can also print the BSA agreement. If you click the Cancel button, the system directs you to your Gateway homepage. If you click the Next button, the system will record the business service within your account profile and then takes you back to Request a Business Service page where you can request additional services.

You will receive confirmation (or denial) via email from the USPS of the Business Service Administrator status for the service at the requested location (Figure 2-30). You can check the status of a request for access by clicking the Request Status link located at the top with other BSA functional links (Figure 2-23 above).

If you decline the BSA role you will receive an auto-generated email communicating the pending status request of your service access request (Figure 2-29). The request will be placed in pending, until a BSA is designated or the assigned BSA responds to your request for service and/or access. Note that also in the instance where a BSA requests the BSA role on your behalf, you have the option to decline the role.

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

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

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

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

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

You can access your services from the Business Customer Gateway:

Figure 2-29: User receives pending status email confirmation if no BSA is assigned

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

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

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

You can access your services from the Business Customer Gateway:

Figure 2-30: User receives email confirmation of Business Service Administrator status

2.8.3 BSA Role of Verification Assessment Evaluator (VAE)

The BSA role of Verification Assessment Evaluator (VAE) is requested and assigned through the same process as for other BSA roles, as described above in this section 2.8. The Verification Assessment Evaluator option appears as a choice when requesting a Business Service as shown in Figure 2-31.

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

Select a Business Service

The Business Services that display on the Business Customer Gateway are grouped into categories. Click the details link next to the service to get more information. To apply for access to a Business Service, select one of the service links from the list below.

Participation in the following programs requires a user to request access to the **Mailer ID** and **Manage Mailing Activity** services, **IN ADDITION TO** the desired business service(s) below:

Every Door Direct Mail® (EDDM)
Intelligent Mail® Small Business (IMsb) Tool
Online Enrollment
Package Intercept

To search for a specific service, enter a key word about that service and then click the **Submit** button for a customized result set.

Locate service where: contains:

- Small Business Services**
 - Select Multiple Services (details)
- Account Services**
 - Incentive Programs (details)
 - Verification Assessment Evaluator (PostalOne!) (details)
- Design & Prepare**
 - Intelligent Mail Small Business (IMsb) Tool (details)
 - Mailer ID (details)
- Mail & Transport**
 - Customer Label Distribution System (CLDS) (details)
 - Customer/Supplier Agreements (CSAs) (details)
 - Package Intercept (details)
 - Schedule a Mailing Appointment (FAST) (details)
 - Transportation Location Service (TLS) (details)
- Mailing Services**
 - Audit Mailing Activity (PostalOne!) (details)
 - Every Door Direct Mail (details)
- Shipping Services**
 - Manage Electronic Return Activity (PRS) (details)
 - Manage Electronic Verification Activity (eVS) (details)
 - Manage Scan Based Payment Activity (SBP) (details)
 - Online Enrollment (details)
- Track & Report**
 - Manage Mailing Activity (details)
- Tools and Wizards**
 - Sample Service 1 (details)

Figure 2-31: VAE option under Select a Business Service

A VAE must be established for a CRID (location), to gain access to the Full-Service Verification Invoice Report in *PostalOne!* Once the role is established, this report is reached through the Business Customer Gateway as shown in Figure 2-32.

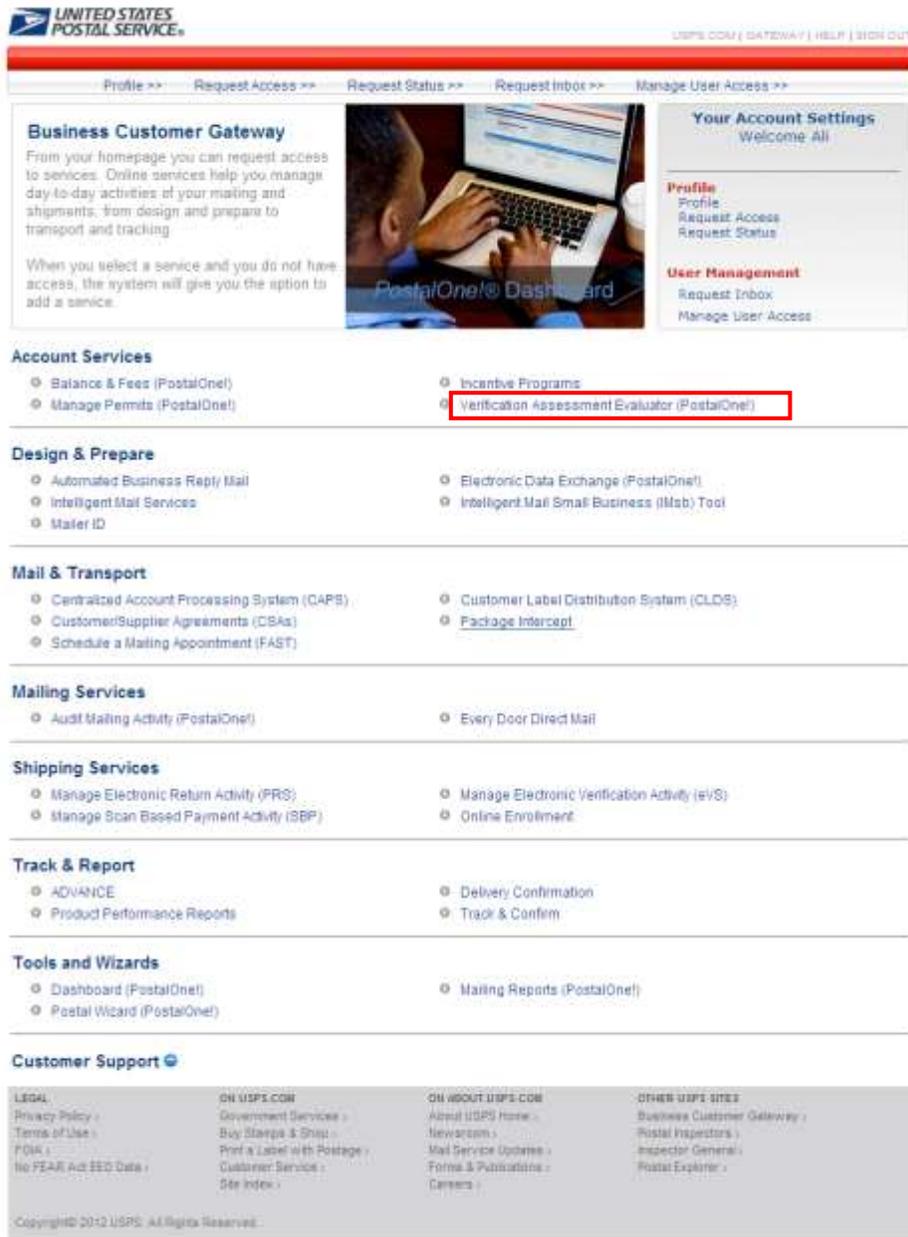


Figure 2-32: Link for VAE from BCG website

2.9 Contingent / Dependent Services

On March 6, 2011, contingent and dependent services were implemented. When a user requests access to a service, the system will verify whether the service access is contingent on access to another service. Subsequently, the Contingent BSA would need to approve the Dependent BSA for the requested CRID. Therefore, a contingent service is an online service for which an existing Business Service Administrator (BSA) approves or revokes a user's access request to one or more dependent services.

Nomenclature to describe new relationships between services and BSAs are described below:

- The Contingent Service: The service for which the existing BSA approves or assigns BSAs access for one or more dependent services.
- The Dependent Service: A service whose BSA access is granted by a Contingent BSA.

- The Contingent BSA: The BSA that can approve or assign a BSA for a dependent service.
- The Dependent BSA: The user who is requesting access to become the BSA of a dependent service.

If you are the BSA for a business service which has a dependent service, it means the service for which you are the BSA is a contingent service and you are required to approve and/or revoke a user's request to become a BSA for a dependent service. It also initiates the request for the user of such a dependent service to become a BSA; the contingent BSAs of dependent services must approve the request.

2.9.1 Request Access for a Dependent Service

Scenario

- Request access for a dependent Service Example: Online Enrollment
- Online Enrollment has two contingent services, the Mailer ID and Manage Mailing Activity services.
- A user requesting access to a service which has contingent services, needs to be approved by the BSA of all of those contingent services before gaining BSA privileges for the service and business location. So, there needs to be a BSA for contingent services for a business location before a user can become a BSA for a service which is dependent on another service. In this scenario, in order to gain access to Shipping services for a business location, the user needs to be approved by the BSA of Mailer ID and Manage Mailing Activity services for that business location.

Work Flow

1) User clicks on "Request Access" link which will display the Select a Business Service screen. User clicks on "Online Enrollment" link to request access.

Profile >>> Request Access >>> Request Status >>> Request Inbox >>> Manage User Access >>>

Select a Business Service

The Business Services that display on the Business Customer Gateway are grouped into categories. Click the details link next to the service to get more information. To apply for access to a Business Service, select one of the service links from the list below.

Participation in the following programs requires a user to request access to the **Mailer ID** and **Manage Mailing Activity** services, **IN ADDITION TO** the desired business service(s) below:

Every Door Direct Mail® (EDDM)
Intelligent Mail® Small Business (IMsb) Tool
Online Enrollment
Package Intercept

To search for a specific service, enter a key word about that service and then click the **Submit** button for a customized result set.

Locate service where: contains:

- Small Business Services**
 - Select Multiple Services (details)
- Account Services**
 - Incentive Programs (details)
 - Verification Assessment Evaluator (PostalOne!) (details)
- Design & Prepare**
 - Intelligent Mail Small Business (IMsb) Tool (details)
 - Mailer ID (details)
- Mail & Transport**
 - Customer Label Distribution System (CLDS) (details)
 - Customer/Supplier Agreements (CSAs) (details)
 - Package Intercept (details)
 - Schedule a Mailing Appointment (FAST) (details)
 - Transportation Location Service (TLS) (details)
- Mailing Services**
 - Audit Mailing Activity (PostalOne!) (details)
 - Every Door Direct Mail (details)
- Shipping Services**
 - Manage Electronic Return Activity (PRS) (details)
 - Manage Electronic Verification Activity (eVS) (details)
 - Manage Scan Based Payment Activity (SBP) (details)
 - Online Enrollment (details)
- Track & Report**
 - Manage Mailing Activity (details)
- Tools and Wizards**
 - Sample Service 1 (details)

Figure 2-33

2) In the select Business Location screen, user selects one of the existing business locations and clicks next.

Select Business Locations

Select at least one business location to associate to a service. This enables you to access the data for that business location.

You have selected the following online service:

Service

When using this service, you will be linked with the business locations you add to your user profile. If you would like to be linked with a business location that is not shown in the table below, click the **Add Location** button to add a new location to your profile.

After you have entered all of the desired business locations, attach them to the business service by selecting the check box next to each business name, and then click the **Next** button.

Click the **Cancel** button to return to the previous screen.

[Add Location](#)

	Business Name	CRID	Address	City	State/Province	ZIP/Postal Code
<input type="checkbox"/>	Redfin	1817528	308 OCCIDENTAL AVE S STE 205	SEATTLE	WA	98104-4427
<input type="checkbox"/>	Smith Perfect Mailings	94130264	200 MONTGOMERY ST STE 200	SAN FRANCISCO	CA	94104-3401

[Cancel](#) [Next >](#)

Figure 2-34

3) Business Service Administrator Approval screen is displayed. After reviewing the BSA agreement, check the “I certify that I have read and understand the foregoing. And check the business location that the user wants to be a BSA for and click yes.

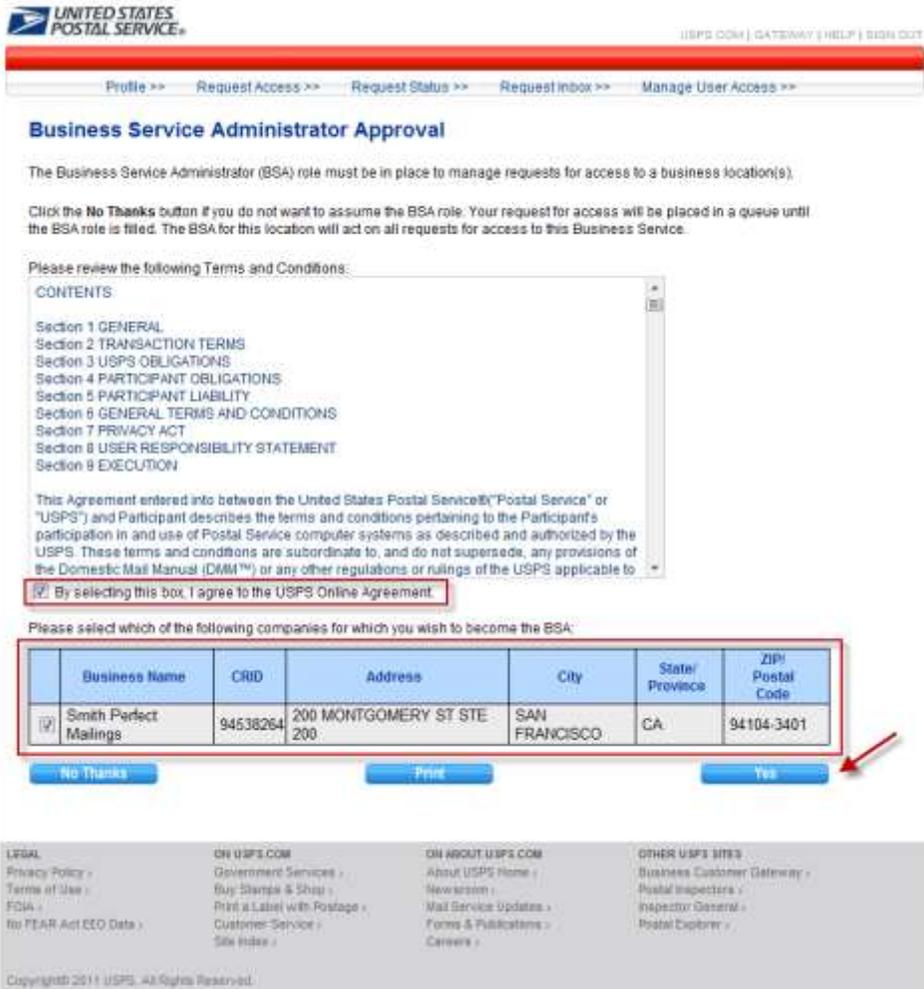


Figure 2-35

4) Click the Yes button.



Figure 2-36

5) Business Customer Gateway screen is displayed.

UNITED STATES POSTAL SERVICE

USPS.COM | GATEWAY | HELP | SIGN OUT

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

Business Customer Gateway
 From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.

Your Account Settings
 Welcome Ali

Profile
 Profile
 Request Access
 Request Status

User Management
 Request Inbox
 Manage User Access

Account Services

- Balance & Fees (PostalOne!)
- Manage Permits (PostalOne!)
- Incentive Programs
- Verification Assessment Evaluator (PostalOne!)

Design & Prepare

- Automated Business Reply Mail
- Intelligent Mail Services
- Maier ID
- Electronic Data Exchange (PostalOne!)
- Intelligent Mail Small-Business (IMsb) Tool

Mail & Transport

- Centralized Account Processing System (CAPS)
- Customer/Supplier Agreements (CSAs)
- Schedule a Mailing Appointment (FAST)
- Customer Label Distribution System (CLDS)
- Package Intercept

Mailing Services

- Audit Mailing Activity (PostalOne!)
- Every Door Direct Mail

Shipping Services

- Manage Electronic Return Activity (PRS)
- Manage Scan Based Payment Activity (SBP)
- Manage Electronic Verification Activity (eVS)
- Online Enrollment

Track & Report

- ADVANCE
- Product Performance Reports
- Delivery Confirmation
- Track & Confirm

Tools and Wizards

- Dashboard (PostalOne!)
- Postal Wizard (PostalOne!)
- Mailing Reports (PostalOne!)

Customer Support

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 Inspector General
 Postal Explorer

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Figure 2-37

6) Contingent BSA for each service logs into the application and Click on Request Inbox link and click the last name under “Dependent Requests” section for the shipping services record.

Request Inbox

The user(s) below has requested access to the dependent Business Service(s) as shown. Click on the link for the user's last name to approve or deny this request(s). The request(s) will automatically be denied if you do not grant approval within 25 days of the request date.

Access Requests

Request ID	Date Submitted	Last Name	First Name	Business Name	Business Location	Business Service	Status
12867	11/18/2011	Smith	Jane	View Details	View Details	Manage Mailing Activity	Pending BSA

One Request found.

LEGAL	ON USPS.COM	ON ABOUT.USPS.COM	OTHER USPS SITES
Privacy Policy	Government Services	About USPS Home	Business Customer Gateway
Terms of Use	Buy Stamps & Stop	Newsroom	Postal Inspectors
FOIA	Print a Label with Postage	Mail Service Updates	Inspector General
No PEARL Act EEO Data	Customer Service	Forms & Publications	Postal Explorer
	Site Index	Careers	

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Figure 2-38

7) Contingent BSA clicks Approve.

Request Details

As the BSA you can approve or deny the user's request for access as shown below.

Click the **Return to Queue** button to return to the **Request Inbox** page without taking action on this request. The request will expire if you do not grant approval within 25 days of the request date.

Requester Information:

Name: Jane Smith
 Email: jane.s.smith@usps.gov
 Username: JaneSmith

Request Information:

Submit Date: 11/18/2011
 Expiration Date: 12/23/2011
 Type: Access Service
 Status: Pending BSA
 Business Service: Manage Mailing Activity
 BSA Group: Manage Mailing Activity

Business Location Information:

This user is requesting service access for a new location.
 Name: [Redacted]
 CRID: [Redacted]
 Address: [Redacted]
 City: [Redacted]
 State/Province: [Redacted]
 ZIP/Postal Code: [Redacted]
 Country: UNITED STATES

Deny Return to Queue **Approve**

Figure 2-39

8) Contingent BSA clicks Confirm.

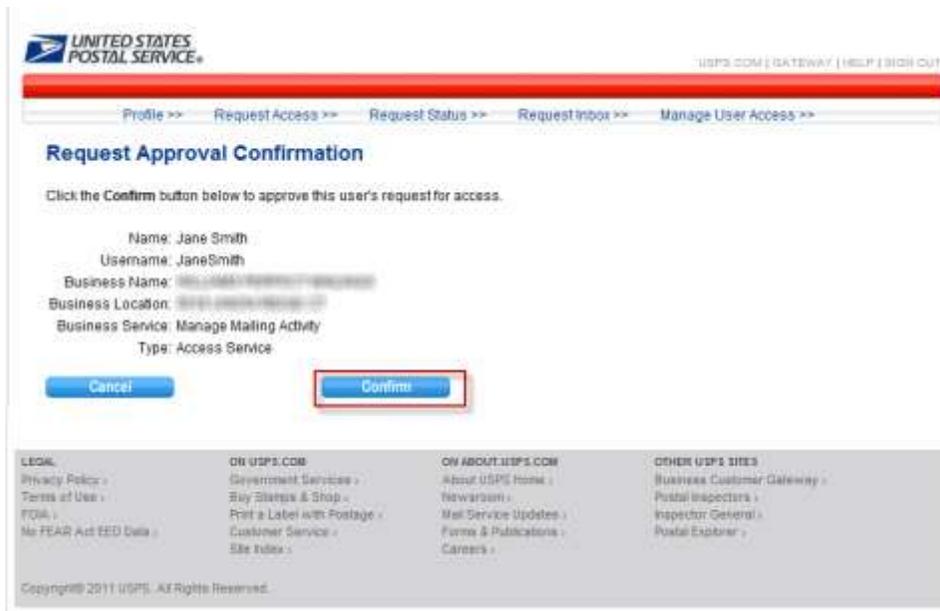


Figure 2-40

9) Request Inbox screen is displayed.



Figure 2-41

10) The user who requested the service for a business location logs into the application and clicks profile.

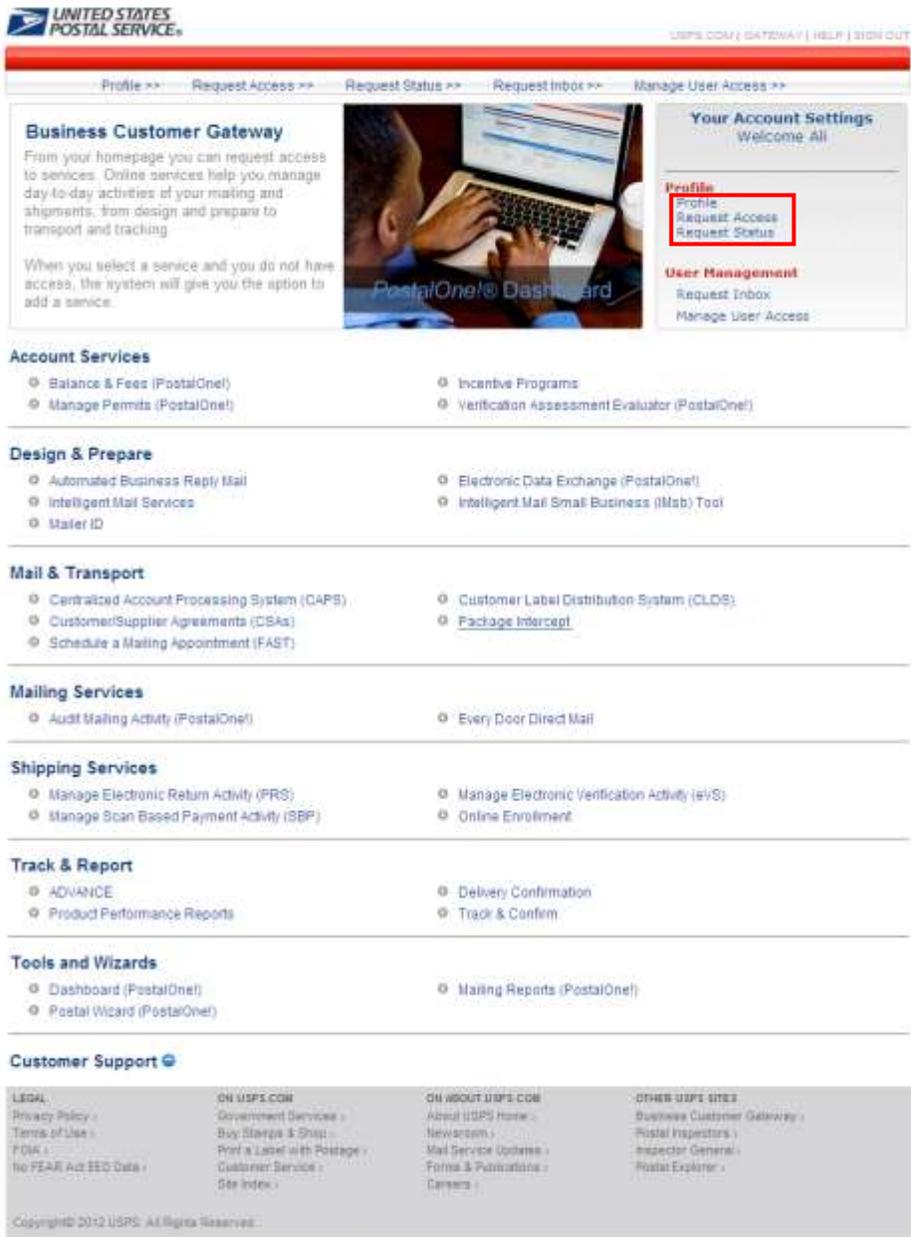


Figure 2-42

11) The user profile is displayed. Under the services section, the shipping services is displayed for the business location and this user is the BSA for the service.

[Profile >>](#) [Request Access >>](#) [Request Status >>](#) [Request Inbox >>](#) [Manage User Access >>](#)

Profile Information

Welcome Jane, your current user profile and affiliated business locations are shown below.

User Information

Name: Jane Smith
 Company Name: Smith Perfect Mailings
 Address Line 1: 200 MONTGOMERY ST STE 200
 City: SAN FRANCISCO
 ZIP / Postal Code: 94104-3401
 State / Province: CA
 Country: UNITED STATES
 Email: susan.p.wells@usps.gov
[Edit User Profile](#)
[View BSA Agreement](#)

If you need to edit the profile information for one of your associated business locations just click on the Business Name link.

Business Locations

Business Name	CRID	Address	City	State/Province	ZIP/Postal Code
Redfin	9817524	308 OCCIDENTAL AVE S STE 205	SEATTLE	WA	98104-4427
Smith Perfect Mailings	9413254	200 MONTGOMERY ST STE 200	SAN FRANCISCO	CA	94104-3401

Displaying all Businesses.

To remove access to one or more services, select the associated check boxes and click the Remove Service button. If you are the BSA for a service, you must instead call the Help Desk to remove your access to that service.

Services

Service	Business Name	Business Location	BSA Status
<input type="checkbox"/> Balance & Fees (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Dashboard (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Electronic Data Exchange (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Incentive Programs	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Incentive Programs	Redfin	308 OCCIDENTAL AVE S STE 205	Yes
<input type="checkbox"/> Mailing Reports (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Manage Mailing Activity	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Manage Permits (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Postal Wizard (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes
<input type="checkbox"/> Verification Assessment Evaluator (PostalOne!)	Smith Perfect Mailings	200 MONTGOMERY ST STE 200	Yes

Displaying all Services.

[Remove Service](#)

Figure 2-43

2.9.2 Assign BSA for a Dependent Service

Scenario

- A dependent service has users for a business location but there is no BSA.
- A BSA for a business service which is a contingent service for the above mentioned service may initiate a request for a user of that service to become BSA provided all the contingent BSAs of this dependent service approve such a request.

Workflow

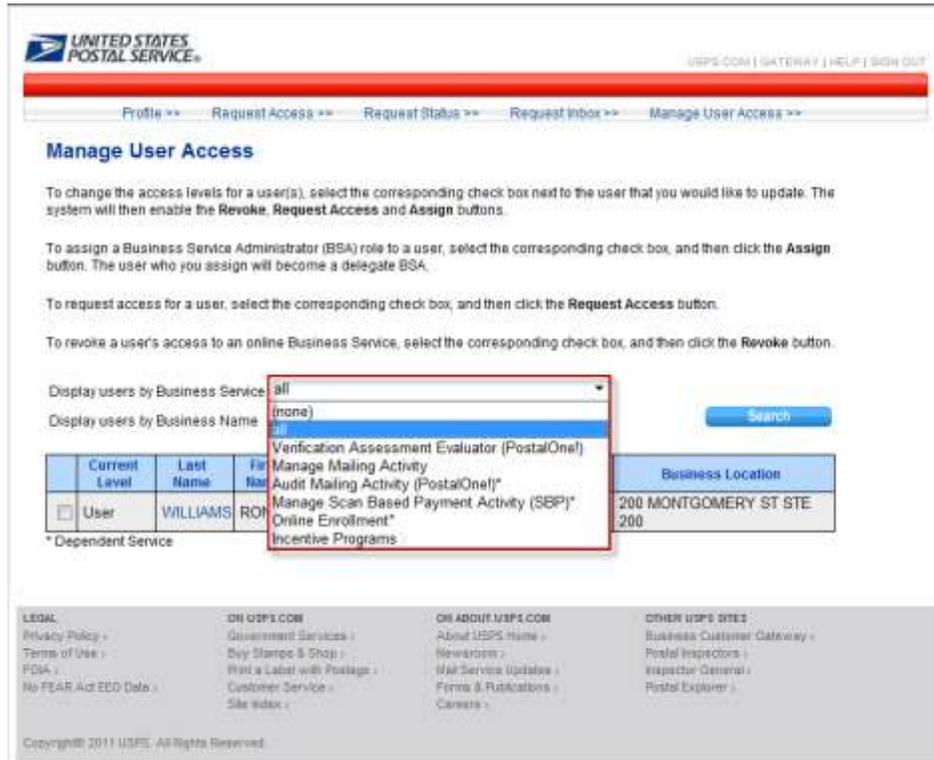


Figure 2-44

1. Login to application with the user who is the BSA for a contingent Service which has a dependent service with users but no BSA.
2. Click Manage Users.
3. In the Display users by Business Service drop down, the list of business service for which the current logged in user is the BSA are displayed without an asterisk. An asterisk is displayed for a dependent service for which there is no BSA.
4. Choose all for both business service and business name and click Search
5. All the users for all the business services in the drop down are displayed.
6. Choose the dependent user to become a BSA for the dependent service, check the checkbox and click Assign button which will be enabled after the choosing a valid user.

UNITED STATES POSTAL SERVICE® USPS.COM | GATEWAY | HELP | SIGN OUT

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

Manage User Access

To change the access levels for a user(s), select the corresponding check box next to the user that you would like to update. The system will then enable the **Revoke**, **Request Access** and **Assign** buttons.

To assign a Business Service Administrator (BSA) role to a user, select the corresponding check box, and then click the **Assign** button. The user who you assign will become a delegate BSA.

To request access for a user, select the corresponding check box, and then click the **Request Access** button.

To revoke a user's access to an online Business Service, select the corresponding check box, and then click the **Revoke** button.

Display users by Business Service: **all**

Display users by Business Name: **(none)** [Search](#)

	Current Level	Last Name	First Name	Service	Business Name	Business Location
<input checked="" type="checkbox"/>	User	WILLIAMS	RON	Manage Mailing Activity	Smith Perfect Mailings	200 MONTGOMERY ST STE 200

* Dependent Service

[Revoke](#) [Request Access](#) [Assign](#)

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Figure 2-45

7. Confirmation page is displayed

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Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

Manage User Access Confirmation

Review the information below to assign the user that you selected to the BSA role, click the **Confirm** button to complete the request.

Click the **Cancel** button to return to the previous screen.

NEW Access Level	Last Name	First Name	Service	Business Name	Business Location
BSA Status	WILLIAMS	RON	Manage Mailing Activity	Smith Perfect Mailings	200 MONTGOMERY ST STE 200

* Dependent Service

[Cancel](#) [Confirm](#)

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Figure 2-46

8. Click the Confirm button. A request for the selected user to become BSA will be initiated.

3. Electronic Documentation Initial Set-up and Access

3.1 Mail.dat

3.1.1 Overview

The mailing industry's standardized Mail.dat format is one of three ways mailers can submit electronic documentation (eDoc) to the *PostalOne!* system. To engage with the *PostalOne!* using eDoc, file submissions and fields must comply with the Postal Service Mail.dat specifications. Technical details concerning the Mail.dat file format and content are provided in the *Postal Service Mail.dat Technical Specification*.

3.1.2 Basic Automation

For mailers who wish to participate in the basic automation option, and wish to move from the POSTNET barcode to using the Intelligent Mail barcode (IMb), the requirement is to apply the IMb on letters and flats. Mailers currently using legacy STIDs, for example, with the Confirm[®] Service, will need to transition to new STIDs supported by the Intelligent Mail barcode (refer to *A Guide to Intelligent Mail for Letters and Flats*, section 2.5 for details on STID usage). Briefly, an STID is used to identify the class of mail and any additional or special services requested for a given mailpiece. The STID also defines whether the mailpiece is full-service or basic automation, or whether the mailpiece is nonautomation.

3.1.3 eDoc

For eDoc using Mail.dat, a mailer can participate with or without Intelligent Mail services. Before participating in eDoc, a new mailer is required to submit the Mail.dat files in the test environment for mailers (TEM). In this environment, a mailer is expected to pass the required test scenarios for the mail classes they plan to handle plus any optional scenarios that may be representative of their operation but which are optional (refer to the test scenarios Appendix A of this document).

3.1.4 Full-Service

A mailer who wishes to participate in the full-service option must comply with Intelligent Mail barcodes and label requirements; and submit mailing information electronically where the ability to nest relationships and uniquely identify the mailpiece must be demonstrated with tray or sack labels and containers using IMbs as required.

As with eDoc, a new mailer must successfully submit Mail.dat files (and pass the required full-service test scenarios) in the TEM before transferring Mail.dat files to the Production *PostalOne!* system and participate in full-service.. The Production environment is used by all customers that have been first validated in the TEM environment for the different Mail.dat specifications by the *PostalOne!* Help Desk. Refer to Chapter 7 of this document regarding the TEM.

3.1.5 TEM

To begin participating in Mail.dat you must obtain access to the *PostalOne!* system. This is accomplished by getting access approval to the *Manage Mailing Activity* service. Once the request for the Manage Mailing Activity is approved (you will receive a notification by email), log in to the Business Customer Gateway and click on the "Electronic Data Exchange (*PostalOne!*)" link (Figure 3-1) and then click the "Go to TEM" link to enter the TEM.

Mailers must work with the Help Desk to start the process of validating Mail.dat files, software and executing the minimum set of test criteria to be completed in the TEM. A Help Desk direct email link is enabled in the TEM (Figure 3-2).

UNITED STATES POSTAL SERVICE® USPS.COM | GATEWAY | HELP | SIGN OUT

[Profile >>](#)
 [Request Access >>](#)
 [Request Status >>](#)
 [Request Inbox >>](#)
 [Manage User Access >>](#)

Business Customer Gateway

From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.



Your Account Settings
Welcome Jane

Profile
[Profile](#)
[Request Access](#)
[Request Status](#)

User Management
[Request Inbox](#)
[Manage User Access](#)

Account Service

- [Balance & Fees \(PostalOne!\)](#)
- [Manage Permits \(PostalOne!\)](#)
- [Verification Assessment Evaluator \(PostalOne!\)](#)

Design & Prepare

- [Electronic Data Exchange \(PostalOne!\)](#)
- [Intelligent Mail for Small Business Mailing \(IMSB\)](#)
- [Intelligent Mail Services](#)
- [Mailer ID](#)

Mail & Transport

- [Centralized Account Processing System \(CAPS\)](#)
- [Customer Label Distribution System \(CLDS\)](#)
- [Customer/Supplier Agreements \(CSAs\)](#)
- [Schedule a Mailing Appointment \(FAST\)](#)

Track & Report

- [ADVANCE](#)
- [Delivery Confirmation](#)
- [Product Performance Reports](#)
- [Track & Confirm](#)

Mailing Services

- [Audit Mailing Activity \(PostalOne!\)](#)
- [Every Door Direct Mail Retail](#)

Shipping Services

- [Manage Electronic Return Activity \(PRS\)](#)
- [Manage Electronic Verification Activity \(eVS\)](#)
- [Manage Scan Based Payment Activity \(SBP\)](#)
- [Online Enrollment](#)

Tools & Wizard

- [Dashboard \(PostalOne!\)](#)
- [Mailing Reports \(PostalOne!\)](#)
- [Postal Wizard \(PostalOne!\)](#)

Customer Support

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---	---	--	--

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Figure 3-1: Electronic Data Exchange Link

container visibility, Address Correction Data, Nixie Detail data, By/For Conflict, and Full-Service Data Quality reports.

Mail.XML v10.0A, v11.0D and v12.0A specifications are supported in TEM and Production for Mail.XML full-service data feedback messages. Refer to Table 4: Mail.XML TEM support.

Under the full-service option, Full-Service ACS data comprises both Change-of-address (COA) and Nixie information and are available via Mail.XML to Mail owners or their delegate. Full-service start-the-clock and container visibility feedback are available via Web Service to Mail Owners, Mail Preparers or to a business entity they delegate.

The two Web Service methods to receive full-service start-the-clock and container visibility feedback are Push and Pull. The Pull model enables a customer to send a Web Service based Mail.XML request message invoking a USPS Web Service to pull data in XML format. Mail.XML Push model is where the USPS invokes a customer's Web Service method/URL and pushes XML data to the customer's Web Service when the data is available, or a notification is sent to the customer by the USPS that customer's data is available for download (refer to the section on Mail.XML push data in this document).

Note that there is a third option to obtain full-service feedback; this is via online download reports. Refer to the [Electronic Mailing Information and Reports Guide](#), chapter 1.

3.2.3 Mail.XML Full-Service Checklist

Full-service mailers have the option of submitting electronic documentation (eDoc) for their mailings using Mail.XML version 11.0D or 12.0A. Interested mailers are required to execute test scenarios for Mail.XML in the test environment for mailers (TEM). *Test Environment for Mailers: Checklist and Troubleshooting Guide* has been prepared to assist customers in preparing for the full-service and basic automation options using Mail.XML. The checklist describes the initial steps, preparation for FAST, eDoc, and full-service data distribution testing, the Mail.XML TEM process and moving into Production.

For the full-service option, customers must comply with Intelligent Mail full-service requirements, which include specific requirements for container and handling-unit labeling, and electronic submission of mailing information. Customers must demonstrate nesting relationships of containers and mailpieces and the ability to identify mailpieces, trays or sacks, and containers using unique Intelligent Mail barcodes. The checklist provides the associated steps to meet those requirements. Go to RIBBS <http://ribbs.usps.gov/index.cfm?page=intellmailguides>.

3.2.4 Mail.XML Software Testing in the TEM

For mailers interested in Mail.XML full-service, required test scenarios must be executed in the TEM. The TEM is designed to simulate the Production environment to allow customers to send and receive Web services requests using Mail.XML messaging with the USPS. All validations and business rules will operate in the same manner as in the Production environment.

The required scenarios are essential to establish customer readiness to participate in XML messaging with the USPS. Optional scenarios are provided for customers who plan to conduct similar transactions in Production and want to gain familiarity with other full-service features of Mail.XML. The USPS encourages customers to perform the optional and as many scenarios as necessary to mitigate *PostalOne!* Help Desk calls in Production.

Customers are directed to the RIBBS site to download the required XSDs (XML schema definition and templates) and Web Services Description Language (WSDL). These include the USPS-provided WSDLs and authentication XSD; and IDEAlliance Mail.XML XSDs. USPS responses for electronic documentation and FAST will be based on actual data submitted by the customer engaged in the testing. USPS responses for full-service data distribution will be based on controlled test data created by the USPS to enable expected results of TEM testing for full-service data distribution messages.

Availability	FAST Messages *	Full-Service Data Distribution Messages	eDocumentation and Postage messages	Profile Management (MID-CRID) messages
Now	FAST Mail.XML 8.0B FAST Mail.XML 10.0 FAST Mail.XML 12.0A FAST Mail.XML 12.0B **	DD Mail.XML 11.0D DD Mail.XML 12.0A DD Mail.XML 12.0B **	eDoc Mail.XML 11.0D eDoc Mail.XML 12.0A eDoc Mail.XML 12.0B **	MID-CRID Mail.XML 11.0D MID-CRID Mail.XML 12.0A MID-CRID Mail.XML 12.0B **

Table 4: Mail.XML TEM support

** *PostalOne!* will support these Mail.XML versions after the October 14, 2012 release. If a newer Mail.XML version is supported an update will be made to Table 4 above.

3.3 Mail.XML Push Method

One method by to receive full-service feedback is through electronic push data exchange (or Web service technology). A customer must subscribe to the service to start receiving the data feed and notifications from USPS using the Push Subscription Profile set-up procedure. Another option for receiving full-service feedback is through manual downloading of data in CSV (Comma Separated Values) or spreadsheet formats from through the Business Customer Gateway, Manage Mailing Activity service, Mailing Reports. These methods are described in Electronic Mailing Information and Reports Guide, chapter 1, Full-Service Reports.

3.3.1 Mail.XML Push Data

In the Mail.XML Push model the USPS invokes a customer's Web Service URL and pushes XML data to the customers Web Service when the data is available, or a notification is sent to the customer by the USPS that the customer's data is available for retrieval.

To receive full-service push data the customer must initially set up a business account at the Business Customer Gateway. A new or existing customer, after completing the Business Customer Gateway approval and request access steps for the Manage Mailing Activity service, must also set up a push subscription profile (accessed through Mailing Reports, Figure 3-3). The customer must have BSA role privileges in order to set up a push subscription profile. This activation process enables data distribution control; data distribution is driven by data provided in the eDoc to the *PostalOne!* system via the By/For relationship.

The Mail.XML TEM Worksheet – Customer Identification form must be completed and submitted to the *PostalOne!* IT Data Distribution Team. This form is used to authorize open connectivity between a customer's push servers and the customer's end point using Secure Sockets Layer (SSL) communication. The form is in Appendix B of Test Environment for Mailers (TEM) Checklist and Troubleshooting, which can be downloaded from RIBBS®. The completed form should be emailed as an attachment to the PostalOneITDataDistributionTeam@usps.gov. Connectivity requires at least five business days.

To access full-service data using Mail.XML Push method, the USPS invokes the customer's Web Service through the Push Subscription Profile. As a subscriber of detail data (Delivery or Notification messages) the customer can automatically receive either the detail data or the notifications as they pertain to Start-the-Clock, Container Visibility Scans, Full-Service ACS COA and Nixie data, By/For Conflict and Full-Service eDoc Data Quality Verification. Note: Customers are enabled access to the Push Data Subscription upon completing the TEM process.

Messages that end with the word "Delivery" mean that the message has the detail data and the customer receives the data as it becomes available. Messages that end with the word "Notification" mean that the

message will convey that the data is ready to be pulled by the customer through Pull Mail.XML mechanism or other approved method. Notification messages will not have detail data.

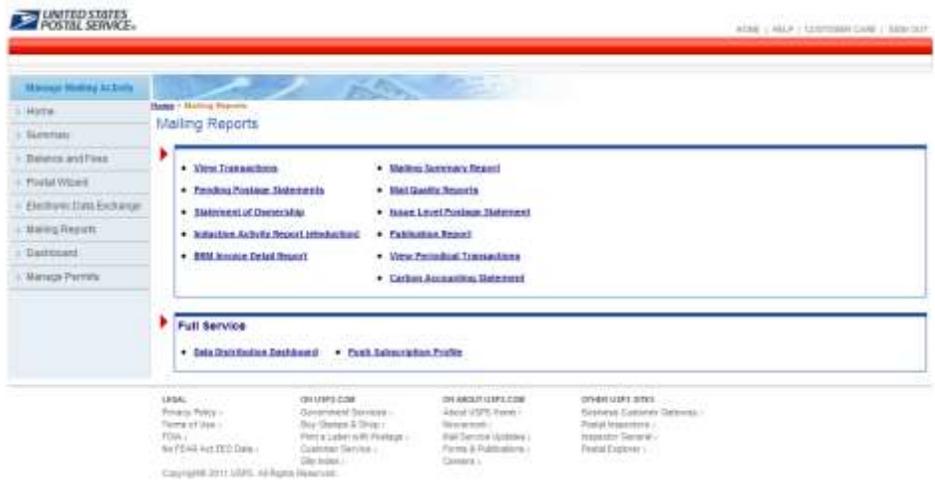


Figure 3-3: Push Subscription Profile access

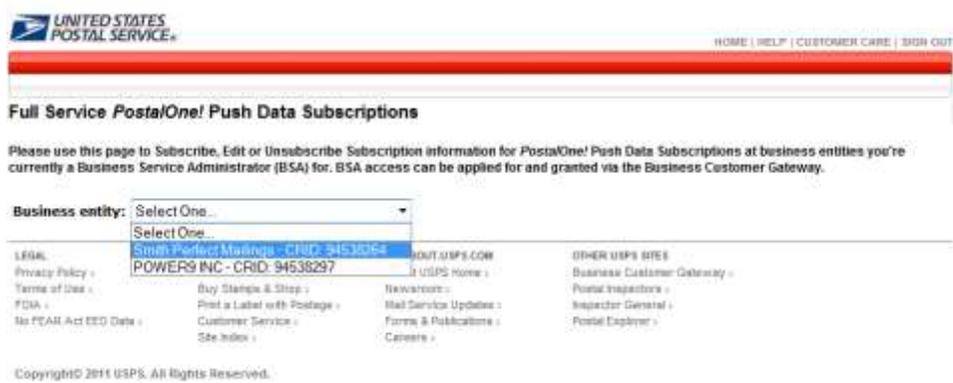


Figure 3-4: Push Data Subscriptions landing page

3.3.2 View Push Subscription(s) Data

From the Mailing Reports page (Figure 3-3), click on the link, “Push Subscription Profile”. The system returns the Data Subscriptions landing page, presenting a drop down menu of all affiliated CRIDs for which you are linked. The system will display the Full-Service *PostalOne!* Push Data Subscriptions page that lists all Push Data message types along with the Business Entity’s subscription status for each message type. You can select a different business entity from the dropdown menu to refresh the table containing the Message Type, Status and Actions columns. Refer to Figure 3-4.

Message types are listed below.

1. Message Type. The name of the message, which can be either of six types.
 - Full-Service Address Correction
 - Full-Service Container Visibility (For Pallet and Tray scans)
 - Full-Service MPS Vis (For Bundle top piece scan)
 - Full-Service Nixie
 - Start-the-Clock
 - By/For Conflict

- Full-Service eDoc Data Quality Verification
2. Subscription Status. The status indicates whether the business entity has a subscription for the Message Type. Possible values include: Subscribed for Delivery, Subscribed for Notification, or Not Subscribed.
 3. Actions. For a Message Type that the business entity is already subscribed, there will be three hyperlinks Subscribe, Unsubscribe and Edit that allow the user the option to edit or unsubscribe to a subscription (Figure 3-5).

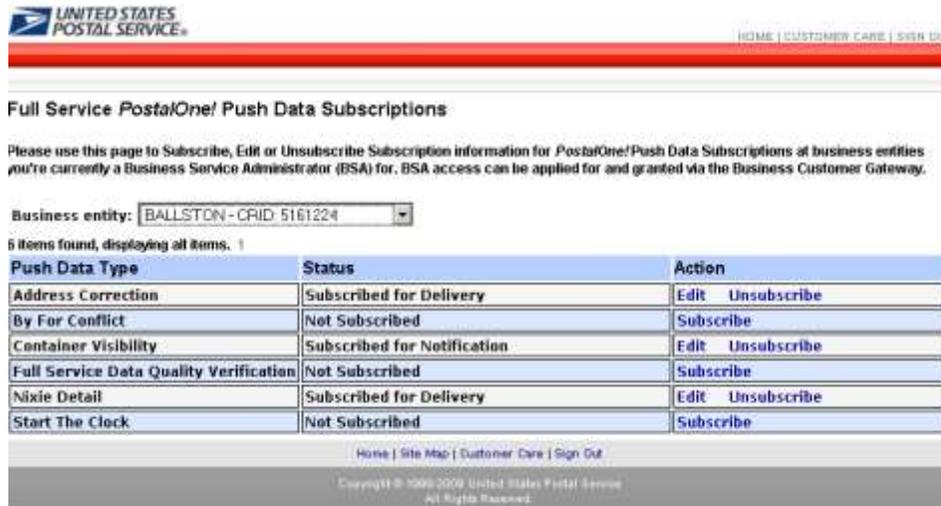


Figure 3-5: Push Data Subscription (subscribe mode)



Figure 3-6: Push Data Subscriptions after selecting a business entity/CRID combination

3.3.3 New Push Data Subscription(s)

From the Full-Service *PostalOne!* Push Data Subscriptions screen page (Figure 3-6), if you click on the Subscribe link for a message type, the system displays a new Push Data subscription page.

You can select from the Push Type dropdown menu and enter all the required fields then click submit to subscribe to a Push Message Type (possible selections are Delivery or Notification). You have the option of selecting the Frequency from the dropdown menu (possible selections are six, twelve or twenty-four hours). The Push Data **Notification** message sends a notice to the mail owner's computer that data is ready for them to come and Pull their ACS feedback. Push Data **Delivery** allows USPS to push Address Correction data to Mail Owner's computer.

When the Push Data subscription request is submitted you will receive a completion message (Figure 3-8). USPS will notify you when the USPS subscription process steps are completed (normally within 5 days).

UNITED STATES POSTAL SERVICE®

HOME | CUSTOMER CARE | SIGN OUT

Full Service PostalOne! Push Data Subscriptions

All fields are required

BALLSTON, 4600 NORTH FAIRFAX DR, ARLINGTON, VA 99999-0000 CRID: 5161224

Message: By Far Conflict

Push Type:

User id:

Password:

Confirm Password:

Web Service URL:

Push start date:

Frequency:

Message Version:

Home | Site Map | Customer Care | Sign Out

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Figure 3-7: Edit Push Data Subscription (edit mode)

3.3.4 Edit Push Data Subscription(s)

On the Full Service *PostalOne!* Push Data Subscriptions screen, if you click on the Edit link for a subscribed message, the system will display the subscription profile in the edit mode (Similar to Figure 3-7, with the fields populated.). You will then have the option to change or update the required field(s) and then click Submit. The Confirmation page will display as in Figure 3-8.



Figure 3-8: Confirmation page displays after the user selects the Submit button.

3.4 Mail.XML Pull Method

In the Mail.XML pull model a customer hosts their own Web Services URL and sends a Web Service based Mail.XML Request message to invoke the USPS Web Service to pull data in XML format through a Mail.XML query request and response messages. The query Request is done by the customers' software and the USPS sends the query Response message with the data. Mail.XML

When a user sends a request, a response from the USPS with data or error/return code is returned to the user. Data sent through Mail.XML pull messaging includes: start-the-clock, container visibility scans, ACS COA, ACS Nixie Detail and Full Service eDoc Data Quality Verification. Additionally, a Mailer ID can also be obtained through the USPS ID Mail.XML management messages through the pull model. For details on all

supported full-service data feedback Mail.XML messages, refer to the *Postal Service Mail.XML Technical Specification for Profiles & Full-Service Feedback* volume.

4. Postal Wizard

4.1 Electronic Documentation

The Postal Wizard (PW) uses a secure protocol for online submission of postage statements for mailings. The Postal Wizard is one of the methods of submitting electronic documentation, besides Mail.dat and Mail.XML. The *PostalOne!* system generates postage statements from data sent electronically through the Postal Wizard. Refer to the following section (4.2) for access to the Postal Wizard.

Users can complete and submit postage statement electronically using the Postal Wizard for the following forms:

- 3541 Periodicals
- 3541 Periodicals – Combined
- 3600 First-Class Mail
- 3600 Priority Mail
- 3602 Standard Mail
- 3605 Bound Printed Matter
- 3605 Parcel Post
- 3605 Media Mail or Library Mail
- 3700-A Part A First Class-Mail International

The Postal Wizard automatically populates the permit holder section of the postage statement based on the account number. The Postal Wizard automatically validates the information entered and calculates the postage. Once users complete the postage statement online, they can submit these electronic statements directly to their acceptance unit. When a postage statement form is submitted, the Postal Service acceptance unit finalizes (verifies the statement and the customer's account is immediately debited for postage), the finalized postage statement is available for the permit holder to view and print from their computers. Receipts are also electronically sent.

4.1.1 Postal Business Tasks

Besides submitting postage statements online, the Postal Wizard system also allows customers to perform other postal business tasks, including the following:

- View electronically submitted information and cancel postage statements
- Check balance and fees
- View pending statements
- View completed transactions
- View and download reports
- Download transaction report
- Download postage statement details
- Manage Permits

4.1.2 Reports (PostalOne!)

Postage statements submitted via the Postal Wizard and through electronic documentation using Mail.dat and Mail.XML are visible through Mailing Reports. Reports that present postage statements and related information include the following (see also chapter 5 in this document and [Electronic Mailing Information and Reports Guide](#) for more detailed information on the reporting tools):

- View Transactions (lists all transactions using Postal Wizard, Mail.dat or Mail.XML entry)
- Mailing Summary Report (summarizes all postage statements in a designated time period for a particular permit using Postal Wizard, Mail.dat or Mail.XML entry)
- Issue Level Postage Statement (sums the issue level postage for all Periodicals postage statements submitted via the acceptance office, using Postal Wizard, Mail.dat or Mail.XML entry)
- Pending Postage Statements (Only postage statements electronically submitted using Postal Wizard features appear in this list. This report can be used to find the Mailing Group ID that must be communicated to acceptance personnel with a mailing.)

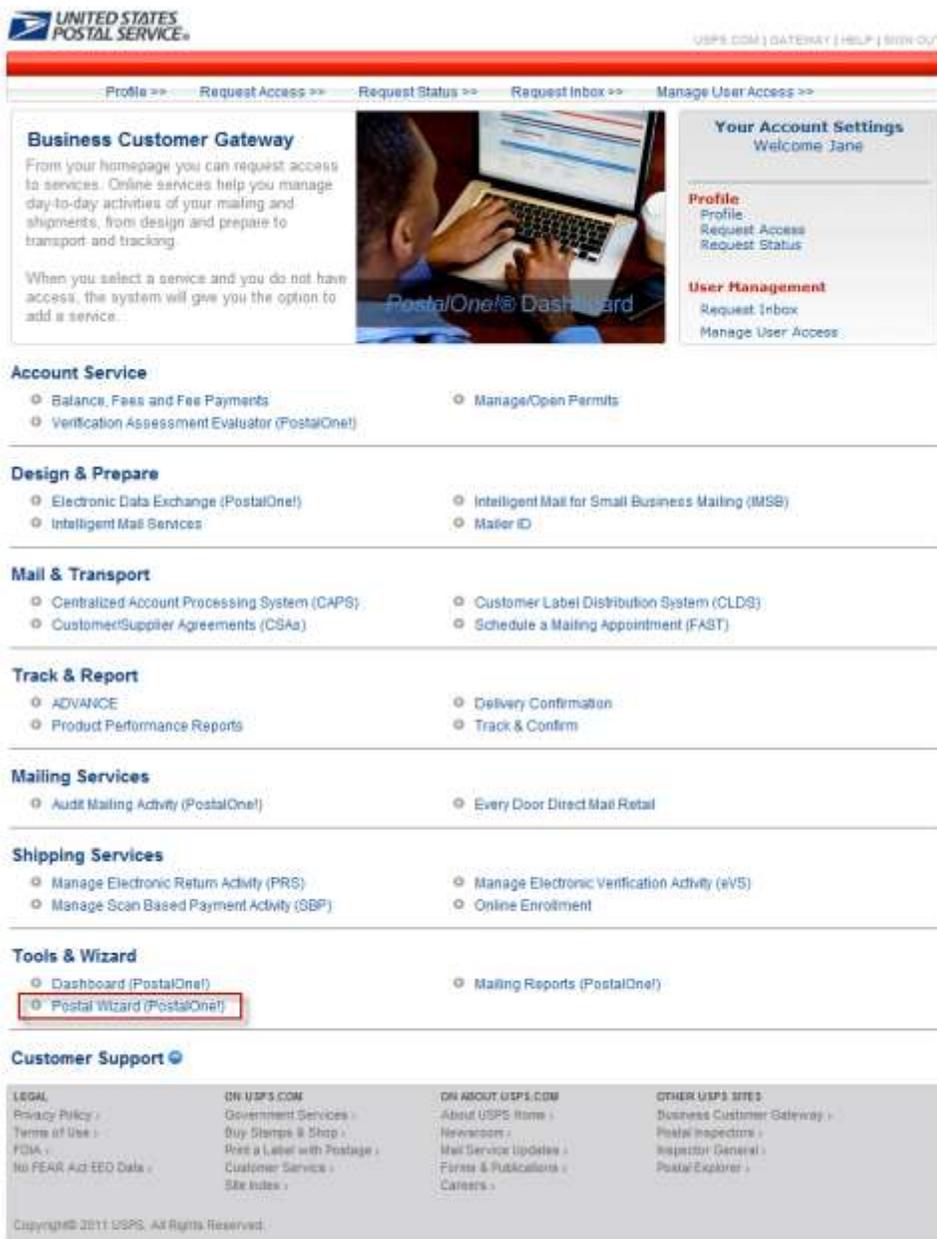


Figure 4-1 The Postal Wizard link is located on a user’s homepage.

4.2 Postal Wizard Access

To access the Postal Wizard, a user must apply for the *Manage Mailing Activity* service through the Business Customer Gateway request service access process (refer to the section on Business Services to learn how to request a service). Once the request for the Manage Mailing Activity is approved by the BSA (the user will receive a notification by email), the user can log in to the Business Customer Gateway. The user then selects the Postal Wizard under the Manage & Transport menu (Figure 4-1 above). The Postal Wizard landing page displays (Figure 4-2).

Permit holders with Mail Owner access to the Postal Wizard will only have access to the permits they own. Mailing Agents who have access to the Postal Wizard have the ability to submit mailings for all permits in the finance numbers to which they have applied and have been approved for access. Mailing

Agents who need access to their customer permit information, must have access to the Manage Mailing Activity service for which the CRID the paying permit is linked. Refer to the Managing Permits section 2.5 above.

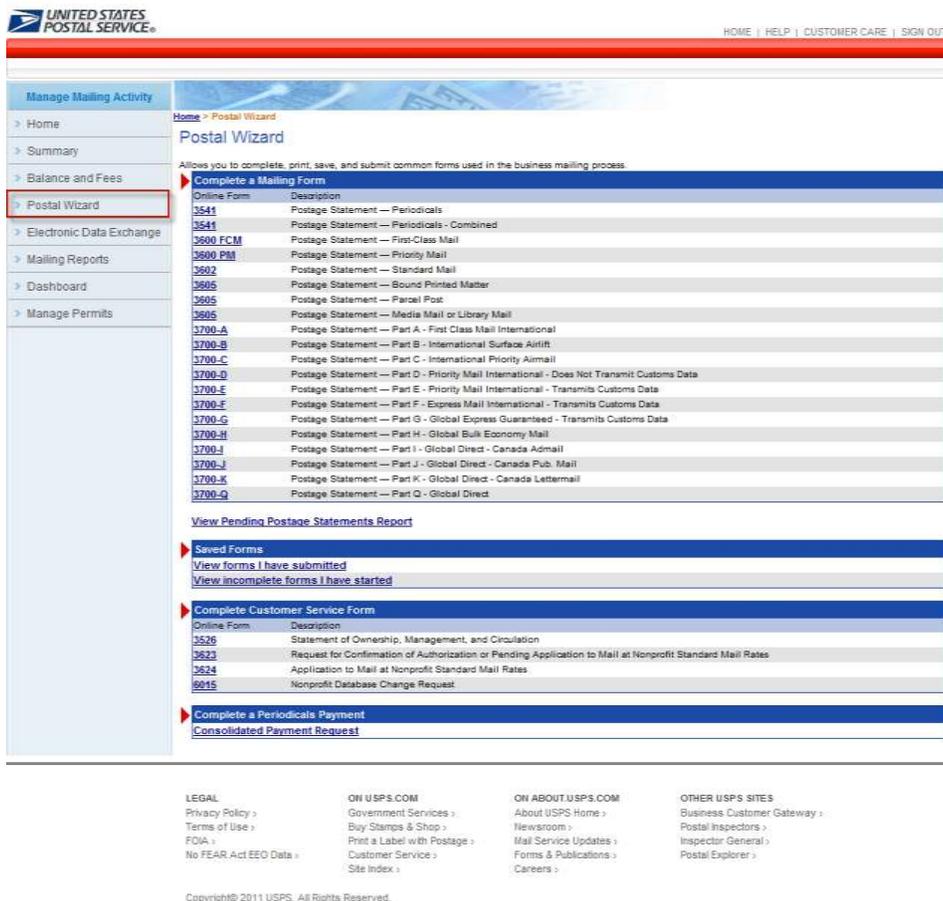


Figure 4-2: Accessing Online Postage Statement forms through the Postal Wizard

4.3 Full-Service Mailings using the Postal Wizard

Full-service information is visible to the users via the Postal Wizard submission of postage statements, including the Full-Service indicator and other mailing information (permit type, permit number, postage statement sequence number, total number of pieces, class of mail, and processing category). For full-service mailings using the Postal Wizard, only the owner of the mailing permit will receive start-the-clock information. For the basic automation option, mailers electing to use the Postal Wizard or elect to use Postal Wizard to electronically submit postage statement information for full-service must satisfy the eligibility requirements. Refer to *A Guide to Intelligent Mail for Letters and Flats* for information on the full-service and/or basic automation options conditions when using the Postal Wizard. A summary of the conditions follow.

4.3.1 Full-Service Mailings and Postage Statement Information

Postal Wizard submissions may be used to enter electronic postage statements for full-service mailings. All postage payment methods (permit imprint, OMAS imprint, postage meter, OMAS meter and Precanceled stamps) are available for full-service mailings. Postal Wizard cannot be used with full-service Periodicals and Bound Printed Matter mailings.

Mailpieces in certain mail categories that are prepared in accordance with the full-service requirements are eligible for discounts (refer to *A Guide to Intelligent Mail for Letters and Flats*, section 2, for details on Intelligent Mail requirements and discount eligibility). To accommodate this discount, a discount line for each

section eligible for full-service pricing will be added to existing postage statements, including automation First-Class Mail cards, letters, and flats, Periodicals letters and flats, Bound Printed Matter flats, and Automation Standard Mail letters and flats.

4.3.2 Permit Imprint

USPS acceptance personnel will finalize each postage statement to debit the account for the full amount of postage required.

4.3.3 Postage Meter

In accordance with DMM standards, mailpieces in a full-service meter mailing must bear the correct price. The “Correct” price is the exact amount of postage necessary on each piece and is equivalent to the applicable published price minus the full-service discount.

Example: Mailing contains 5-Digit (5-D) Automation and 3-Digit (3-D) Automation mailpieces: The “Correct” price metered on each piece is the 5-D Automation (qualifying pieces) published price minus the full-service discount and the 3-D Automation (qualifying pieces) published price minus the full-service discount.

4.3.4 Precanceled Stamps

In accordance with DMM standards, mailpieces in a full-service Precanceled stamps mailing must bear the appropriate Precanceled stamps for the mail class, i.e., First-Class Mail, Standard Mail, or Nonprofit Standard Mail. Net Postage Due must be paid through an Advanced Deposit Account or a meter stamp affixed to the required postage statement. USPS acceptance personnel will finalize each postage statement to account for the full amount of postage required.

4.3.5 Postal Wizard Full-Service Requirements

A mailer must click the full-service checkbox to indicate a mailing is full-service for the Mail Class (Figure 4-3). A Mailer is required to enter specific information for full-service using either of two options as follows. After the Mailer ID (six or nine digit) is entered, the user is subsequently required to either 1) enter the **Mailing ID** (serialized number), or 2) **range of sequence numbers**: the lowest piece ID (6 or 9 characters) and highest piece ID (6 or 9 characters).

If the mailer wishes to receive full-service feedback data, the user must enter a **range of sequence numbers** which must match the actual physical barcodes; entering a **Mailing ID** will not allow the full-service feedback. Refer to *A Guide to Intelligent Mail for Letters and Flats*, Section 3.16 for more information.

The Mailer must enter leading zeroes when entering the range of sequence numbers. For example, if the range of sequence is nine characters, and the range to be entered is “5000”, the Mailer must enter “000005000”.

When using the **Mailing ID option**, a mailer assigns the same combination of Mailer ID and Mailing ID within a mailing to all mailpiece barcodes, i.e., Letters, Card, or Flats, entering the serialized number in the field provided. When using the **range of sequence numbers option**, a mailer uses unique sequential numbers on mailpieces by entering the lowest sequence number and the highest sequence number in the fields provided (Figure 4-5). Note that the range must be truly sequential (with no numbers skipped), and the number of pieces in the Lowest and Highest Piece ID range must equal the number of pieces in the mailing. By/For is required for full-service feedback and postage payment; Postal Wizard identifies Mail Owner and Mail Preparer through the permit numbers. Note that the Permit holder permit or publication number is used to identify the entity that is paying for the mailing.

Postage statements have been modified to support full-service and other related changes. The postage statements generated from full-service electronic mailing information using Mail.dat, Mail.XML, or the Postal Wizard will include a line for the number of pieces claiming the full-service prices. Refer to Figure 4-3 through Figure 4-8 full-service postage statement line items.

Manage Mailing Activity

Home | Dashboard | Postage Statement

Postage Statement
Standard Mail - Permit Imprint | Permit Entry

Name Information

	Permit Holder	Mailing Agent	Mail Owner
Number	025	025	025 Search
Type	Permit Imprint	Permit Imprint	Permit Imprint
CRD	4430507	4430507	

Price Eligibility: Regular
Authorization No:

Post Office of Mailing: ROANOKE VA 24002-9998

Full-Service

This is a Political Campaign mailing:
 This is a consolidated statement:
 Combined Mixed Class:
 Combined Single Class:
 None:

Face-Weight: Pounds Ounces
(Must be less than 1 pound.)

* Total Pieces:
 Total Weight: lbs

* Mailing Date: [Help](#)

Incentive Claimed: Select an incentive program --
 Processing Category: Select a Processing Category --
 No. of unsplit address pieces:
 Move Update Method: Select a Move Update Method --

Next Step: Account Verification Information [Continue](#)

Permit Entry

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Figure 4-3: Postage Statement 3602 (Mailing Agent view)

The Full-Service indicator box using the Postal Wizard. Figure 4-4 appears upon the user selecting the Continue button.

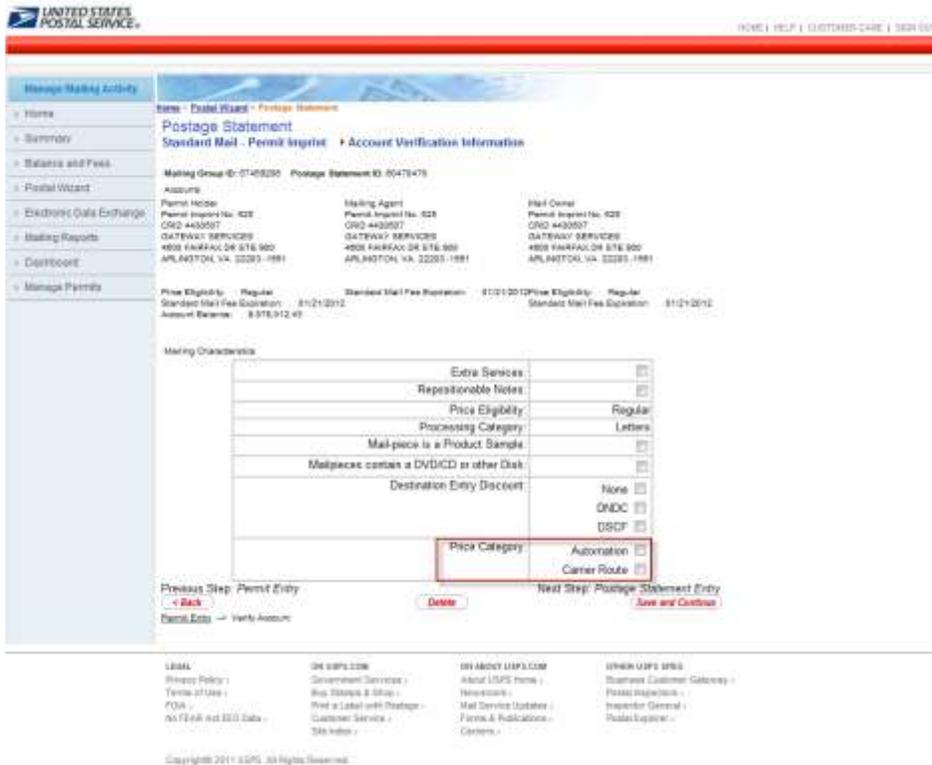


Figure 4-4: Postage Statement 3602 (Mailing Agent view)

Account Verification Information. Note the price category is automation or carrier route.

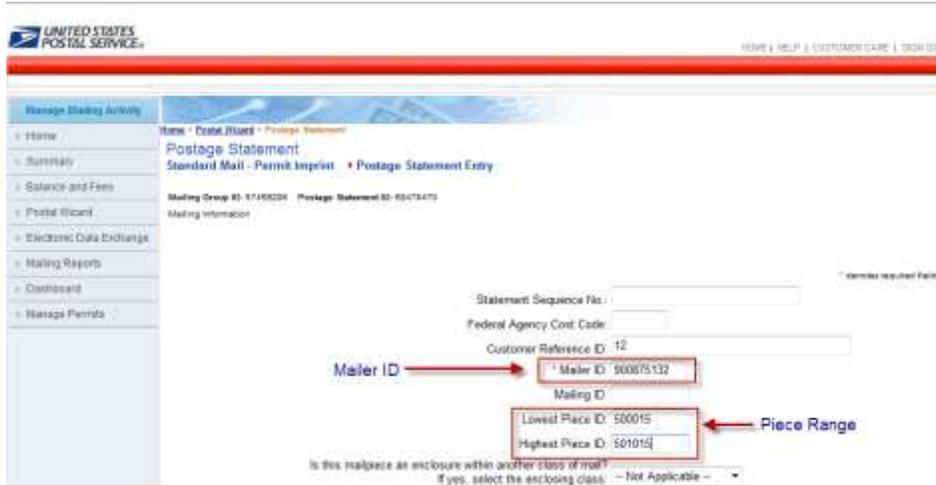


Figure 4-5: Postage Statement 3602 (Mailing Agent view) data entry requires the Mailer ID

The Mailer ID field is a required data entry field. When the Mailer ID is entered, subsequently either the Mailing ID or range of sequence numbers must be entered on the postage statement entry screen. Note that in Figure 4-5, the Range of Sequence Number (piece range) option is demonstrated. The exploded view in Figure 4-6 shows details about the mailing including the discount for the full service option.

Description	Price	Quantity	Postage
Letters	0.336	250 pcs	\$ 83.7500
Letters	0.357	250 pcs	\$ 89.2500
Letters	0.360	250 pcs	\$ 90.0000
Letters	0.363	250 pcs	\$ 90.7500
Part A Subtotal (Lines A1-A12)		1000 pcs	\$ 353.7500
Full Service Intelligent Mail Option	0.000		\$ -3.0000
Total Postage From All Parts:			\$ 350.7500
Total From Attached Form 3840-D:			\$ 350.7500

Figure 4-6: Postage Statement 3602 Part A (Mailing Agent view)

A final review screen before the user clicks the Submit button which would trigger BMEU verification (Postage amounts are for illustration purposes only.)

Line Number	Title	Description	Price	Quantity	Postage
A6	Single	Letters	0.336	250 pcs	\$ 83.7500
A7	Single	Letters	0.357	250 pcs	\$ 89.2500
A8	AADC	Letters	0.360	250 pcs	\$ 90.0000
A9	Mixed AADC	Letters	0.363	250 pcs	\$ 90.7500
A13	Number of pieces that comply	Part A Subtotal (Lines A1-A12)		1000 pcs	\$ 353.7500
		Full Service Intelligent Mail Option	0.000		\$ -3.0000
					Part A Postage
					\$ 350.7500
					Total Postage From All Parts
					\$ 350.7500
					Total From Attached Form 3840-D
					\$ 350.7500

Part A: Additional Fees

For Extra Services and Other Fees

Signature

Name of the agent or permit holder who will be submitting this postage statement: DANIEL CROCKER

Agent or permit holder's telephone number: (813) 243-8939

Buttons: Back, Submit to Print/Save

Figure 4-7: Postage Statement 3602 Part A: full-service discount is shown.

Mailing Agent exploded view from figure 4-6. (Postage amounts are for illustration purposes only.) From the final review screen, the page before clicking the Submit button, the confirmation page displays (Figure 4-8). This confirmation page, included with any required supporting documentation, is the page that is printed by the Mailer to take to the BMEU.

In the postage statement section, Part A (Figure 4-7), the system subtracts Line A14 from Line A13 to derive the total postage.

The value in postage statement entry Line A14 should be the same as the Line A14 of the postage statement confirmation Part A (Figure 4-8).

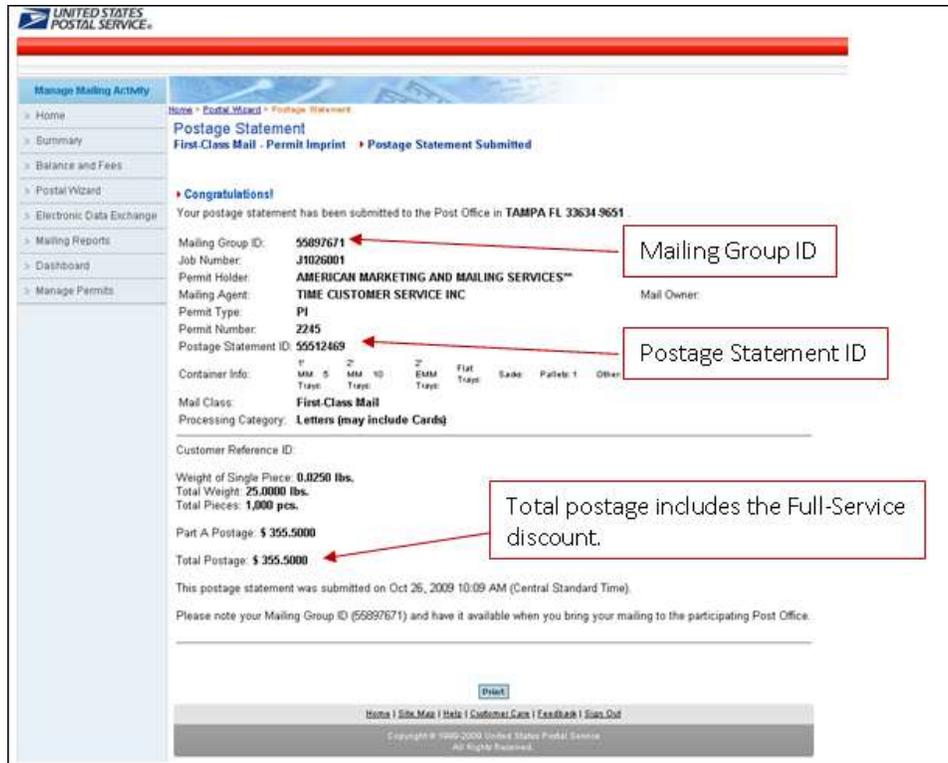


Figure 4-8: Postage Statement 3602 (Mailing Agent view) confirmation page.

(Postage amounts are for illustration purposes only.)

4.4 Submitting a Postage Statement

The following screens (Figures 4-9 through 4-26) demonstrate how to submit a postage statement using the Postal Wizard for a mailing that is not for the full-service option. The Periodicals online form 3541 is demonstrated from the mail owner perspective. The first step is of course to log on to the Business Customer Gateway, then click the Postal Wizard, located under the Mail & Transport menu (Figure 4-9).

Profile >> Request Access >> Request Status >> Request Inbox >> Manage User Access >>

Business Customer Gateway

From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.



PostalOne!® Dashboard

Your Account Settings
Welcome Jane

Profile
[Profile](#)
[Request Access](#)
[Request Status](#)

User Management
[Request Inbox](#)
[Manage User Access](#)

Account Service

- [Balance, Fees and Fee Payments](#)
- [Manage/Open Permits](#)
- [Verification Assessment Evaluator \(PostalOne!\)](#)

Design & Prepare

- [Electronic Data Exchange \(PostalOne!\)](#)
- [Intelligent Mail for Small Business Mailing \(IMSB\)](#)
- [Intelligent Mail Services](#)
- [Mailer ID](#)

Mail & Transport

- [Centralized Account Processing System \(CAPS\)](#)
- [Customer Label Distribution System \(CLDS\)](#)
- [Customer/Supplier Agreements \(CSAs\)](#)
- [Schedule a Mailing Appointment \(FAST\)](#)

Track & Report

- [ADVANCE](#)
- [Delivery Confirmation](#)
- [Product Performance Reports](#)
- [Track & Confirm](#)

Mailing Services

- [Audit Mailing Activity \(PostalOne!\)](#)
- [Every Door Direct Mail Retail](#)

Shipping Services

- [Manage Electronic Return Activity \(PRS\)](#)
- [Manage Electronic Verification Activity \(eV5\)](#)
- [Manage Scan Based Payment Activity \(SBP\)](#)
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- [Mailing Reports \(PostalOne!\)](#)
- [Postal Wizard \(PostalOne!\)](#)

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Figure 4-9: To Access the Postal Wizard the user selects the link from the homepage

Manage Mailing Activity

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

Home > Postal Wizard

Postal Wizard

Allows you to complete, print, save, and submit common forms used in the business mailing process.

Complete a Mailing Form

Online Form	Description
3541	Postage Statement — Periodicals
3541	Postage Statement — Periodicals - Combined
3600 FCM	Postage Statement — First-Class Mail
3600 PM	Postage Statement — Priority Mail
3602	Postage Statement — Standard Mail
3605	Postage Statement — Bound Printed Matter
3605	Postage Statement — Parcel Post
3605	Postage Statement — Media Mail or Library Mail
3700-A	Postage Statement — Part A - First Class Mail International
3700-B	Postage Statement — Part B - International Surface Airlift
3700-C	Postage Statement — Part C - International Priority Airmail
3700-D	Postage Statement — Part D - Priority Mail International - Does Not Transmit Customs Data
3700-E	Postage Statement — Part E - Priority Mail International - Transmits Customs Data
3700-F	Postage Statement — Part F - Express Mail International - Transmits Customs Data
3700-G	Postage Statement — Part G - Global Express Guaranteed - Transmits Customs Data
3700-H	Postage Statement — Part H - Global Bulk Economy Mail
3700-I	Postage Statement — Part I - Global Direct - Canada Admail
3700-J	Postage Statement — Part J - Global Direct - Canada Pub. Mail
3700-K	Postage Statement — Part K - Global Direct - Canada Lettermail
3700-Q	Postage Statement — Part Q - Global Direct

[View Pending Postage Statements Report](#)

Saved Forms

[View forms I have submitted](#)
[View incomplete forms I have started](#)

Complete Customer Service Form

Online Form	Description
3526	Statement of Ownership, Management, and Circulation
3623	Request for Confirmation of Authorization or Pending Application to Mail at Nonprofit Standard Mail Rates
3624	Application to Mail at Nonprofit Standard Mail Rates
6045	Nonprofit Database Change Request

Complete a Periodicals Payment

[Consolidated Payment Request](#)

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Figure 4-10: Postage Statement online Form 3541 (Mail Owner view) using the Postal Wizard

UNITED STATES POSTAL SERVICE® 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 > **Postal Wizard** > Postage Statement

Postage Statement

If you are a Mail Owner or Publisher, select Publisher in the User Type section. Then click Continue. The next page will list your Periodicals permits; you must select the appropriate Periodicals permits on that page.

If you are a mailing agent, select Mailing Agent in the User Type section. select a permit on this page, then click Continue.

User Type (required):

Publisher Mailing Agent

Period Information

Permit #	CRID	Location	Rate	Address	PO of Mailing	Finance No.
R 121	4638887	ADAMSTOWN, MD	GATEWAY SERVICES	950 FARRAGUT DR STE 806 ARLINGTON, VA 22204-1001	ROANOKE VA 24022-9998	817718
R 122	4638887	ADAMSTOWN, MD	GATEWAY SERVICES	1728 RLYNN ST STE 2014 ARLINGTON, VA 22209-8027	ROANOKE VA 24022-9998	817718
R 123	4638887	ADAMSTOWN, MD	DUO'S ODEK SHOP	3488 SUNSET CT APT 387 MANASSAS PARK, VA 20114-6298	ROANOKE VA 24022-9998	104930

Continue >

Figure 4-11: Postage Statement online Form 3541: selecting the permit

If the user represents a Publication (i.e., is the mail owner), the user selects “Publication” under User Type and then selects a periodicals permit for the statement. If the user is submitting the form on behalf of the mail owner as a Mailing Agent, the user would select “Mailing Agent” under User Type and then select a non-periodicals permit and then the Continue button.

Mailing agents who have access to the Postal Wizard, will have the capability to submit mailings for all permit numbers in the finance number(s) for which they have applied for access. Refer to the Managing Permits section above.

Note: Additional forms can be completed from the Postal Wizard page. Use the online Help for instructions on these forms and on reusing previously submitted postage statements.

UNITED STATES POSTAL SERVICE® 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 > **Postal Wizard** > Postage Statement

Postage Statement

Periodicals - One Issue of One Edition > Permit Entry

Master Information

	Publication	Mailing Agent
Number:	123	N/A
Type:	Periodicals	N/A
CRID:	4638887	N/A

Post Office of Mailing: ROANOKE VA 24022-9998

This is a consolidated statement:

Parts D+E (bundles/containers) only:

Combined Mixed Class:

Combined Single Class:

None:

* Addressed pieces in the mailing: At Least 10,000 9999-250 Less than 250

* Mailing Date: 11/29/2011

* Processing Category: FMS

Next Step: Account Verification Information

Continue >

Permit Entry

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Figure 4-12: Postage Statement online Form 3541: permit entry header information

UNITED STATES POSTAL SERVICE

HOME | HELP | CUSTOMER CARE | SIGN OUT

Message Mailing Activity

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

Home: **EXAM1334567** / **Postage Statement**

Postage Statement
Periodicals - One Issue or One Edition | Account Verification Information

Mailing Group ID: 0134567890 | Postage Statement ID: 001234567

Account: PERIODIC STATEMENT
Postmaster ID: 123
SIC: 443000
MILLS PUBLISHING
12345 PUBLISHING
12345 BROADWAY, ROOM 100
BOSTON, MA 02114-1111

Mailing Agent:

Account Balance: \$ 35,000.00.00

Mailing Characteristics:

Periodical Statement Type	<input checked="" type="radio"/> One Issue or One Edition <input type="radio"/> All Issues in a Calendar Month
Maximum Mailing: 10% Limit	<input type="checkbox"/>
Check this if this statement is for nonresident (or nonresident) copies over the 10% limit	<input type="checkbox"/>
Mailing Destination	<input checked="" type="checkbox"/> Inside County <input type="checkbox"/> Outside County
Price Eligibility	Regular
Processing Category	Flat
Advertising Percentage	31.5%

Figure 4-13: Postage Statement online Form 3541: One Issue or One Edition header information

Price Category:	<input type="checkbox"/> Basic Nonautomation <input type="checkbox"/> Basic Automation <input type="checkbox"/> Mixed ADC Nonbarcoded <input type="checkbox"/> Mixed ADC Barcoded <input type="checkbox"/> ADC Nonbarcoded <input type="checkbox"/> ADC Barcoded <input type="checkbox"/> 5-Digit Nonbarcoded <input type="checkbox"/> 5-Digit Barcoded <input type="checkbox"/> 3-Digit Nonbarcoded <input type="checkbox"/> 3-Digit Barcoded <input type="checkbox"/> Carrier Route Basic <input type="checkbox"/> Carrier Route High Density <input type="checkbox"/> Carrier Route Saturation <input type="checkbox"/> Firm Bundle
Outside County Container Type:	<input type="checkbox"/> Sacks and Trays <input type="checkbox"/> Pallets <input type="checkbox"/> None
Entry Choice:	<input type="checkbox"/> Origin Post Office/DMU <input type="checkbox"/> Origin NDC <input type="checkbox"/> Origin ADC <input type="checkbox"/> Origin SCF <input type="checkbox"/> Destination NDC <input type="checkbox"/> Destination ADC <input type="checkbox"/> Destination SCF <input type="checkbox"/> DDU

Previous Step: *Permit Entry* Next Step: *Postage Statement Entry*

[Permit Entry](#) -> [Verify Account](#)

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Figure 4-14: Postage Statement online Form 3541:User can restrict the postage statement entry lines to preferred line items

Figure 4-15: Postage Statement online Form 3541: Postage statement entry (after header information has been selected)

Number of Containers

1' MM Trays: 2' MM Trays: 2' EMM Trays: Flat Trays: Sacks: Pallets: Other:

Line Items
In-County - Pound Price and Piece Price

		In-County - Pound Price		
Entry Zone		Subscriber Copies	Nonsubscriber Copies	Price
A1.	DDU	<input type="text"/>	<input type="text"/>	0.142
A2.	None	<input type="text"/>	<input type="text"/>	0.185

In-County - Piece Price

Entry / Zone	Presort Discount	Total Copies	Addressed Pieces	Price
Piece Price (Presort)				
A4.	Basic Nonautomation	<input type="text"/>	<input type="text"/>	0.131
A6.	Basic Automation Flats	<input type="text"/>	<input type="text"/>	0.115
A7.	3-Digit Nonautomation	<input type="text"/>	<input type="text"/>	0.119
A8.	3-Digit Automation Flats	<input type="text"/>	<input type="text"/>	0.107
A10.	5-Digit Nonautomation	<input type="text"/>	<input type="text"/>	0.106
A12.	5-Digit Automation Flats	<input type="text"/>	<input type="text"/>	0.100
A13.	Carrier Route Basic	<input type="text"/>	<input type="text"/>	0.060
A14.	Carrier Route High Density	<input type="text"/>	<input type="text"/>	0.044
A15.	Carrier Route Saturation	<input type="text"/>	<input type="text"/>	0.030
A17.	Number of Addressed Pieces at DDU price			0.008

Figure 4-16: Postage Statement online Form 3541: Postage statement entry continued.
 The user enters Containers & In-County information. (Prices shown are for illustration purposes only.)

►Outside County - Pound Price and Piece Price

Outside County - Advertising Pound Price					
Entry Zone	Subscriber Copies		Nonsubscriber Copies		Price
B1.	DDU				0.133
B2.	DSCF				0.203
B3.	DADC				0.215
B4.	1 & 2				0.240
B5.	3				0.263
B6.	4				0.322
B7.	5				0.410
B8.	6				0.503
B9.	7				0.616
B10.	8				0.711

Outside County - Piece Price					
Level	Price Level		Total Copies	Addressed Pieces	Price
Machinable Flats					
C1.	Mixed ADC	Barcoded			0.407
C2.	Mixed ADC	Nonbarcoded			0.439
C3.	ADC	Barcoded			0.381
C4.	ADC	Nonbarcoded			0.404
C5.	3-Digit	Barcoded			0.366
C6.	3-Digit	Nonbarcoded			0.387
C7.	5-Digit	Barcoded			0.280
C8.	5-Digit	Nonbarcoded			0.289
Nonmachinable Flats and Parcels					
C9.	Mixed ADC	Barcoded (flats only)			0.570
C10.	Mixed ADC	Nonbarcoded			0.615
C11.	ADC	Barcoded (flats only)			0.474
C12.	ADC	Nonbarcoded			0.499
C13.	3-Digit	Barcoded (flats only)			0.413
C14.	3-Digit	Nonbarcoded			0.424
C15.	5-Digit	Barcoded (flats only)			0.305
C16.	5-Digit	Nonbarcoded			0.306
Carrier Route & Firm Bundles					
C25.	Basic				0.182
C26.	High-Density				0.153
C27.	Saturation				0.134
C28.	Firm Bundle				0.181

Figure 4-17: Postage Statement online Form 3541: user enters Outside County (advertising pound price and piece price) information.

(Prices shown are for illustration purposes only.)

Outside County - Bundle Price				
Container Level	Bundle Level		Bundles	Price
D1.	Mixed ADC	Mixed ADC		0.078
D2.	Mixed ADC	ADC		0.204
D3.	Mixed ADC	3-Digit/SCF		0.271
D4.	Mixed ADC	5-Digit		0.280
D5.	Mixed ADC	Firm		0.182
D6.	ADC	ADC		0.113
D7.	ADC	3-Digit/SCF		0.186
D8.	ADC	5-Digit		0.202
D9.	ADC	Carrier Route		0.319
D10.	ADC	Firm		0.151
D11.	SCF/3-Digit	3-Digit/SCF		0.127
D12.	SCF/3-Digit	5-Digit		0.147
D13.	SCF/3-Digit	Carrier Route		0.283
D14.	SCF/3-Digit	Firm		0.139
D15.	5-Digit	5-Digit		0.142
D16.	5-Digit	Carrier Route		0.149
D17.	5-Digit	Firm		0.078

Outside County - Sack/Tray Price				
Container Level	Entry		Sacks/Trays	Price
Outside County - Sack/Tray Prices				
E3.	Mixed ADC Sack/Tray	Origin Post Office/DMU		0.426
E7.	ADC Sack/Tray	Origin Post Office/DMU		2.839
E15.	3-Digit/SCF Sack/Tray	Origin Post Office/DMU		2.130
E20.	5-Digit/Carrier Route Sack/Tray	Origin Post Office/DMU		2.739

Previous Step: Account Verification Information Next Step: Confirmation

[Back](#) [Delete](#) [Save and Continue](#)

[Print Entry](#) → [View Address](#) → [Postage Statement Entry](#)

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Figure 4-18: Postage Statement online Form 3541: user enters Outside County (bundle price and sack/tray price) information.

(Prices shown are for illustration purposes only.)

Outside-County - Pallet Price				
Container Level	Entry	Pallet		Price
Outside-County - Pallet Prices				
E27.	Mixed ADC Pallet	Origin NDC		34.361
E28.	Mixed ADC Pallet	Origin ADC		34.361
E29.	Mixed ADC Pallet	Origin SCF		34.361
E30.	Mixed ADC Pallet	Origin Postoffice/DMU		34.361
E31.	ADC Pallet	Origin NDC		33.375
E32.	ADC Pallet	Origin ADC		33.375
E33.	ADC Pallet	Origin SCF		33.375
E34.	ADC Pallet	Origin Post Office/DMU		33.375
E35.	ADC Pallet	Destination NDC		23.127
E36.	ADC Pallet	Destination ADC		12.803
E37.	3-Digit/SCF Pallet	Origin NDC		39.505
E38.	3-Digit/SCF Pallet	Origin ADC		39.505
E39.	3-Digit/SCF Pallet	Origin SCF		39.505
E40.	3-Digit/SCF Pallet	Origin Post Office/DMU		39.505
E41.	3-Digit/SCF Pallet	Destination NDC		24.572
E42.	3-Digit/SCF Pallet	Destination ADC		21.372
E43.	3-Digit/SCF Pallet	Destination SCF		11.460
E44.	5-Digit/Carrier Route Pallet	Origin NDC		50.875
E45.	5-Digit/Carrier Route Pallet	Origin ADC		50.875
E46.	5-Digit/Carrier Route Pallet	Origin SCF		50.875
E47.	5-Digit/Carrier Route Pallet	Origin Post Office/DMU		50.875
E48.	5-Digit/Carrier Route Pallet	Destination NDC		32.936
E49.	5-Digit/Carrier Route Pallet	Destination ADC		31.180
E50.	5-Digit/Carrier Route Pallet	Destination SCF		21.062
E51.	5-Digit/Carrier Route Pallet	DDU		1.652

Previous Step: Account Verification Information Next Step: Confirmation

[< Back](#) [Delete](#) [Save and Continue](#)

Permit Entry -> Verify Account -> Postage Statement Entry

Figure 4-19: Postage Statement online Form 3541: user clicks the Save and Continue button upon all data entry to submit the postage statement for review. (Prices shown are for illustration purposes only.)

UNITED STATES POSTAL SERVICE®

HOME | HELP | CUSTOMER CARE | SIGN OUT

Manage Mailing Activity

- Home
- Summary
- Balance and Fees
- Print Mails
- Electronic Data Exchange
- Mailing Reports
- Dashboard
- Manage Permits

Home / Publications / Postage Statement

Postage Statement

Periodicals - One Issue or One Edition - Confirmation

Basic Information

Please verify the information below. If you need to make any changes press the Back button. Press Submit at the bottom of this page to submit the information you have entered.

Tabulate of Form 3541

Planned

United States Postal Service

Periodicals - One Issue or One Edition

Classroom Classroom
 Nonprofit Nonprofit
 Regular Regular
 Business Agreement Business Agreement

Post Office: Sale Mail Annual Time

Basic Information

Publication Title and Origin or Service Agent's Name World Publications World Publications 1000 Independence Road SE Brentwood, GA 30686-3000	Mailer's Name, Address, Telephone Number, and Email	Entry Post Office Name, State, and ZIP+4 ROANOKE, VA 24062-8888
---	---	--

Operating Balance: 0.00
 Estimated Crossing Balance: 0.00

Mailing Information

Publication No.: 123 ORF: 00000001	Edition Code	Process Category: Flat	Mailer's Mailing Date: 1/12/2011	Statement Sequence No.
---------------------------------------	--------------	------------------------	----------------------------------	------------------------

Figure 4-20: Postage Statement online Form 3541: postage statement verification of data entry, top portion of page.

Mailing Information							
Publication No.: 18153	Edition/Code:	Process Category: Flat	Mailing Date: 10/02/09	Statement Sequence No.:			
Issue Date: 11/02/09	Volume Number:	Issue Number:	Issue Frequency:				
Weight of Single Ride-Along Piece: NA	Weight per Copy for Issue: 0.0075 lbs.		Advertising Percentage in This Issue: 34.95 %				
Total Addressed Pieces: 2000 pcs			Total Postage: \$ 519.99				
No of Containers:	1' MM Trays:	2' MM Trays:	2' 5MM Trays:	Flat Trays:	Stacks:	Pallets:	Other:
For Automation Piece Prices, Enter Date for Address Matching and Coding:		For Carrier Route Piece Prices, Enter Date for Address Matching and Coding:		For Carrier Route Piece Prices, Enter Date of Carrier Route Sequencing:			

In-County						
Part A - Found Price						
Entry	Subscriber Copies:	Nonsubscriber Copies:	Total Copies:	Total Pounds:	Price:	Postage:
A2 Base	990	10	1000	88	0.183	\$ 16.1940
A3	Total In-County Found Price Postage					\$ 16.1940
Part A - Piece Price (Pre-sort)						
Entry Zone	Pre-sort Discount:	Total Copies:	Addressed Pieces:	Price:	Postage:	
A4 Base	Nonautomation	1000	1000	0.131	\$ 130.0000	
A19 Pre-sort Subtotal (All lines A4 through A18)		1000	1000		\$ 130.0000	
A18	Price Price Subtotal (All lines A12)				\$ 130.0000	
A20	Periodicals In-County outside Zone A19 minus A18)				\$ 130.0000	
	Total Part A Postage				\$ 148.10	

Outside County							
Part B - Advertising Found Price							
Entry Zone	Subscriber Copies:	Nonsubscriber Copies:	Total Copies:	Total Pounds:	Advertising Pounds:	Price:	Postage:
B7 B	000	10	1000	55	30	0.404	\$ 12.1200
B11	Subtotal (All lines B7 through B10)						\$ 12.1200
Part B - Nonadvertising Found Price							
Entry Zone	Total Pounds:	Advertising Pounds:	Nonadvertising Pounds:	Price:	Postage:		
B15 All Other:	55	30	50	0.191	\$ 11.4260		
B18	Subtotal (All lines B12 through B14)						\$ 11.4260
	Found Price Postage Total (All lines B11 and B14)						\$ 23.5460
Part C - Piece Price							
Level	Description:	Copies:	Addressed Pcs.	Price:	Postage:		

Figure 4-21: Postage Statement online Form 3541: postage statement verification of data entry, center portion of page. (Postage amounts are for illustration purposes only.)

Part C - Piece Price						
Level	Description:	Copies:	Addressed Pcs.	Price:	Postage:	
C1 Mailed ADC	Standard	1000	1000	0.403	\$ 403.0000	
C29	Subtotal (All lines C1 through C28)	1000	1000		\$ 403.0000	
C30 Nonadvertising % discount				0.00088	-\$ 64.1312	
C31	Subtotal Outside-County Piece Prices Line C29 minus C30)				\$ 338.8688	
Part C - Total Line C31 minus C32						
Part D - Bundle Price						
Container Level	Bundle Level:	Bundles:	Price:	Postage:		
D1 Mailed ADC	Mailed ADC	100	0.077	7.7000		
	Total Bundles (All lines D1 through D17)	100		\$ 7.7000		
Part E - Stack/Tray Price						
Container Level	Entry:	Stacks/Trays:	Price:	Postage:		
E3 Mailed ADC Stack/Tray	Origin Post Office/DMU	9	0.420	3.7800		
E25	Total Stacks/Trays (All lines E1 through E24)	9		\$ 3.7800		
Part E - Pallet Price						
Container Level	Entry:	Pallets:	Price:	Postage:		
E47	Total Pallets (All lines E26 through E46)	0		\$ 0.0000		
	Total Part E - Stack, Tray and Pallet Price Postage			\$ 3.7800		
	Total Outside County Postage			\$ 372.69		
				Total Postage	\$ 519.99	

Certification Statement

By clicking on the "Submit" button, the mailer hereby certifies that all information furnished within this submission is accurate, truthful, and complete; that the mail and the supporting documentation comply with all postal standards and that the mailing qualifies for the prices and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation.

The mailer further certifies, if the mailing is claiming a nonprofit price, that: (1) the mailing complies with 39 USC 3601-3605; (2) the income derived from the sale of any products or services advertised in the mailing is not subject to the Unrelated Business Income Tax (UBIT) and any products and services advertised are substantially related to the nonprofit organization's authorized purpose within the meaning of 39 U.S.C. § 3626(c)(1)(A)(i) and 26 U.S.C. § 513(c); (3) the mailing, if made by a voting registration official, is required or authorized by the National Voter Registration Act of 1993; and (4) it will agree to pay, subject to appeal, any revenue deficiencies assessed on this mailing.

If an agent submits this form, the agent certifies that he or she is authorized to submit on behalf of the mailer, and that the mailer is bound by the certification and agrees to pay any deficiencies. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control.

I understand that anyone who furnishes false or misleading information in this submission or who omits material or information requested on this return form may be subject to criminal and/or civil penalties, including fines and imprisonment.

For information regarding our Privacy Policy visit www.usps.com.

Signature: _____

Figure 4-22: Postage Statement online Form 3541: postage statement verification of data entry, lower portion of page. (Postage amounts are for illustration purposes only.)

Certification Statement

By clicking on the "Submit" button, the mailer hereby certifies that all information furnished within this submission is accurate, truthful, and complete; that the mail and the supporting documentation comply with all postal standards and that the mailing qualifies for the prices and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation.

The mailer further certifies, if the mailing is claiming a nonprofit price, that: (1) the mailing complies with DMM 200-700.1.0; (2) the income derived from the sale of any products or services advertised in the mailing is not subject to the Unrelated Business Income Tax (UBIT) and any products and services advertised are substantially related to the nonprofit organization's authorized purposes within the meaning of 26 U.S.C. § 3625(j)(1)(D)(iii) and 26 U.S.C. § 513(A); (3) the mailing, if made by a voting registration official, is required or authorized by the National Voter Registration Act of 1993; and (4) it will agree to pay, subject to appeal, any revenue deficiencies assessed on this mailing.

If an agent submits this form, the agent certifies that he or she is authorized to submit on behalf of the mailer, and that the mailer is bound by the certification and agrees to pay any deficiencies. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control.

I understand that anyone who furnishes false or misleading information in this submission or who omits information requested on this online form may be subject to criminal and/or civil penalties, including fines and imprisonment.

For information regarding our Privacy Policy visit www.usps.com.

Signature

* Printed name of the mailer who will be signing this statement. Jane Smith

Press **Submit** to submit the information you have entered **only after reading and agreeing to the Certification Statement.**

[Back](#) [Delete](#) [Save and Exit](#) [Submit](#)

Click **Back** to return to the previous page. Click **Submit** to submit this information to PostalOne!

[Permit Entry](#) -> [Web Account](#) -> [Postage Statement Entry](#) -> [Confirm](#)

LEGAL	ON USPS.COM	ON ABOUT.USPS.COM	OTHER USPS SITES
Privacy Policy	Government Services	About USPS Home	Business Customer Gateway
Terms of Use	Buy Stamps & Shop	Newsroom	Postal Inspectors
FOIA	Print a Label with Postage	Mail Service Updates	Inspector General
No FEAR Act EEO Data	Customer Service	Forms & Publications	Postal Explorer
	Site Index	Carriers	

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Figure 4-23: Postage Statement online Form 3541: postage statement verification of data entry and Submit button (end of page)

UNITED STATES POSTAL SERVICE®

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 > Postal Wizard > Postage Statement

Postage Statement

Periodicals - One Issue or One Edition Postage Statement Submitted

Congratulations!

Your postage statement has been submitted to the Post Office in **OKLAHOMA CITY OK 73125-9653**.

Mailing Group ID:	55098586	OKLAHOMA PUBLIC EMPLOYEES ASSOCIATION
Permit Holder:	ADVOCATE	
Permit Type:	PE	
Publication No.:	16153	
Postage Statement ID:	55532765	

Container Info: 1 MM 2 MM 3 MM Flat Same Pallets Other

Mail Class: **Periodical Mail**

Processing Category: **Flats**

Customer Reference ID: **Ruth's Example**

Weight per Copy for Issue: **0.0076 lbs.**

Total Weight: **175,2000 lbs.**

Total Pieces: **2,000 pcs.**

Figure 4-24: Postage Statement online Form 3541: postage statement confirmation (top of page)

Publication No:	16153
Postage Statement ID:	55532765
Container Info:	<input type="checkbox"/> MM <input type="checkbox"/> M <input type="checkbox"/> EMM <input type="checkbox"/> Flat <input type="checkbox"/> Sack <input type="checkbox"/> Pallets <input type="checkbox"/> Other <input type="checkbox"/> Tray <input type="checkbox"/> Tray <input type="checkbox"/> Tray <input type="checkbox"/> Tray
Mail Class:	Periodical Mail
Processing Category:	Flats
Customer Reference ID: Ruth's Example	
Weight per Copy for Issue: 0.0876 lbs.	
Total Weight: 175.2000 lbs.	
Total Pieces: 2,000 pcs.	
Total In-County Postage	\$ 146,1000
Subtotal From Outside-County Pound Prices	\$ 23,5460
Subtotal From Outside-County Piece Prices	\$ 338,8680
Subtotal From Outside-County Bundle Prices	\$ 7,7000
Subtotal From Outside-County Sacks, Trays and Pallets Prices	\$ 3,7800
Total Outside-County Postage	\$ 373,89
Total Postage	\$ 519,99

This postage statement was submitted on Oct 30, 2009 12:35 PM (Central Standard Time).

Please note your Mailing Group ID (55698586) and have it available when you bring your mailing to the participating Post Office.

[Print](#)

[Home](#) | [Site Map](#) | [Help](#) | [Customer Care](#) | [Feedback](#) | [Sign Out](#)

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Figure 4-25: Postage Statement online Form 3541: postage statement confirmation, bottom of page.
 (Postage amounts are for illustration purposes only.)

4.5 Accessing Online Postage Statements

There are various reports and resources for managing postage statements. The primary tool for accessing postage statements is the *PostalOne!* Dashboard, which presents all statements submitted through electronic documentation including the Postal Wizard, Mail.dat and Mail.XML. Statements are grouped by Job ID. Some jobs may comprise multiple statements. Other Jobs may be at the single postage statement level; the user can click on the statement ID to access the postage statement. A postage statement belonging to a combined mailing is displayed as a Job with multiple statements.

Both Mail Providers and Mail Owners can access the same postage statements online. Mail Providers can view postage statements for all their clients, but mail owners can only access their own postage statements (i.e., postage statements for permits they own). Mail providers are encouraged to work with the mail owners to access mail-owner postage statements. Refer to the Managing Permits section above for adding other permits to your profile. To cancel a postage statement, refer to Section 5.4 on Pending Postage Statements.

4.5.1 Dashboard

The Dashboard is a tool for work flow management that allows users to submit and review jobs. Jobs that display on the Dashboard are those that have been submitted by electronic documentation (e.g., Postal Wizard, Mail.dat, and Mail.XML). Jobs can comprise multiple statements or represent a single postage statement. All postage statements are accessible by the single postage statement level through the Dashboard. The Dashboard panel enables the user to retrieve a specific job by using the various search filters.

To access the Dashboard, the select the dashboard link from your gateway homepage (Figure 4-26), From the Dashboard panel, you can search by Submit Date range, Statement Status, Job Status, Postage Statement ID, Mailing Group, Preparer Permit #, Permit Holder #, Include Closed Jobs, Mailer Location, Mailer Job#, Preparer Permit Type, and Permit Holder Type (Figure 4-29). You can also Multi-filter by holding down the Ctrl key while making additional selections.

Profile >> Request Access >> Request Status >>

Business Customer Gateway

From your homepage you can request access to services. Online services help you manage day-to-day activities of your mailing and shipments, from design and prepare to transport and tracking.

When you select a service and you do not have access, the system will give you the option to add a service.



Your Account Settings
Welcome Jane

Profile

- Profile
- Request Access
- Request Status

Account Services

- Balance & Fees (PostalOne!)
- Manage Permits (PostalOne!)
- Centralized Account Processing System (CAPS)
- Verification Assessment Evaluator (PostalOne!)

Design & Prepare

- Electronic Data Exchange (PostalOne!)
- Intelligent Mail Services
- Intelligent Mail for Small Business Mailing (IMSB)
- Mailer ID

Mail & Transport

- Customer Label Distribution System (CLDS)
- Schedule a Mailing Appointment (FAST)
- Customer/Supplier Agreements (CSAs)

Mailing Services

- Audit Mailing Activity (PostalOne!)
- Every Door Direct Mail Retail

Shipping Services

- Manage Electronic Return Activity (PRS)
- Manage Scan Based Payment Activity (SBP)
- Manage Electronic Verification Activity (eVS)
- Online Enrollment

Track & Report

- ADVANCE
- Manage Mailing Activity
- Track & Confirm
- Delivery Confirmation
- Product Performance Reports

Tools and Wizards

- Dashboard (PostalOne!)
- Postal Wizard (PostalOne!)
- Mailing Reports (PostalOne!)**

Customer Support

LEGAL	ON USPS.COM	ON ABOUT.USPS.COM	OTHER USPS SITES
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Terms of Use >	Buy Stamps & Shop >	Newsroom >	Postal Inspectors >
FOIA >	Print a Label with Postage >	Mail Service Updates >	Inspector General >
No FEAR Act EEO Data >	Customer Service >	Forms & Publications >	Postal Explorer >
	Site Index >	Careers >	

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Figure 4-26: Accessing the Dashboard from the Mailing Reports link



Figure 4-27: Accessing the Dashboard from Manage Mailing Activity menu

Dashboard features include the ability to customize user settings (Figure 4-28). The user can expand and collapse multiple statements, define queries to wide and varied degrees. Users can also save search criteria selections to go back to search results at a later time. The Show/Hide feature expands or minimizes each of the sections of the dashboard. (Figure 4-28).

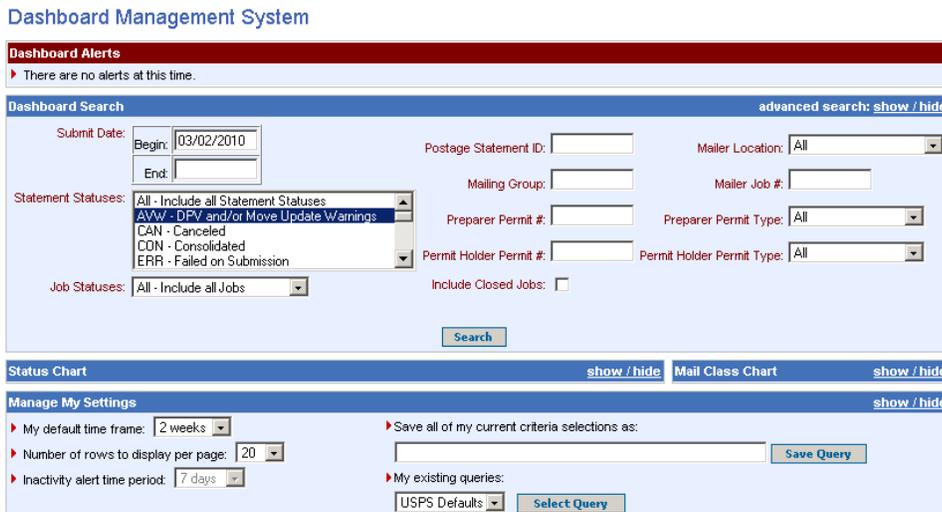


Figure 4-28: Dashboard Management System Search Page (hide mode)

The Dashboard Management System Search Page is shown in its simplest form (Figure 4-29). Dashboard Alerts, Search, Status Chart, Mail Class Chart, and Settings Management are all minimized. This allows for a cleaner and less cluttered starting point. To maximize any section, simply click on the show/ hide link (Figure 4-29).

Dashboard Management System

Dashboard Alerts

▶ There are no alerts at this time.

Dashboard Search advanced search: [show / hide](#)

Submit Date: Begin: <input type="text" value="03/02/2010"/> End: <input type="text"/> Statement Statuses: <input type="text" value="All - Include all Statement Statuses"/> CAN - Canceled CON - Consolidated ERR - Failed on Submission Job Statuses: <input type="text" value="All - Include all Jobs"/> Issue Date: Begin: <input type="text"/> End: <input type="text"/> Issue Number: <input type="text"/> Volume Number: <input type="text"/> Customer Registration ID: <input type="text"/>	Postage Statement ID: <input type="text"/> Mailing Group: <input type="text"/> Preparer Permit #: <input type="text"/> Permit Holder Permit #: <input type="text"/> Include Closed Jobs: <input type="checkbox"/> Mailing Date: Begin: <input type="text"/> End: <input type="text"/> Full-Service Participation: <input type="text" value="All - Includes all Services"/> Full Service Mixed Service	Mailer Location: <input type="text" value="All"/> Mailer Job #: <input type="text"/> Preparer Permit Type: <input type="text" value="All"/> Permit Holder Permit Type: <input type="text" value="All"/> Mail Classes: <input type="text" value="All - Include all Mail Classes"/> BP - Bound Printed Matter FC - First-Class Mail ML - Media/Library Mail Verification Due: <input type="checkbox"/> Deleted Containers: <input type="checkbox"/>
---	--	--

Status Chart show / hide

AVW - DPV and/or Move Update Warnings (0) ERR - Failed on Submission (0) FIN - Finalized Statement (4) NAP - Not Available for Processing (0) PEN - Pending Verification Results (0) REW - Returned for Rework (0)	CAN - Canceled (0) EST - Estimate of Postage (0) FPP - Finalized Pending Payment (0) PAS - Passed Verification without Auto-Finalize (0) QMR - Quality Mail Review (0) UPD - USPS Processing Due (0)	CON - Consolidated (0) FAI - Failed Verification (0) INC - Incomplete (0) PAV - Pending DPV and Move Update Results (0) REV - Reversed (0)
---	---	---

Mail Class Chart show / hide

BP - Bound Printed Matter (0) ML - Media/Library Mail (0) PM - Priority Mail (0) SM - Standard Mail (4)	FC - First-Class Mail (0) PE - Periodicals (0) PP - Parcel Post (0)
--	--

Manage My Settings show / hide

▶ My default time frame: <input type="text" value="2 weeks"/> ▶ Number of rows to display per page: <input type="text" value="20"/> ▶ Inactivity alert time period: <input type="text" value="7 days"/>	▶ Save all of my current criteria selections as: <input type="text"/> <input type="button" value="Save Query"/> ▶ My existing queries: <input type="text" value="USPS Defaults"/> <input type="button" value="Select Query"/>
---	--

Figure 4-29: Dashboard Management System Search Page (show mode)

In the maximized view, more filters are added to the search function (Figure 4-29). These include Issue Date, Mailing Date, Mail Class, Verification Due, Deleted Containers, Full-Service Participation, Issue Number, Volume Number and Customer registration ID. Below the search functions, the Status Chart shows all categories and the number of mailings with a particular status. The Mail Class Chart shows the number of mailings in each of the different Mail Classes. At the bottom of the Dashboard panel are filters that can be set to narrow a search to a finer degree. The inactivity alert time period has been set for seven days and cannot be changed. These jobs display as Dormant Jobs (click the Dormant Jobs link at the top left of the Dashboard panel). The Select Queries button is used to select from a list of queries available to the user. For a filter description, place the cursor over a filter. A pop up in bold blue type over a pale yellow background appears.

Note: The Status Chart legend identifies where the postage statements are in the USPS acceptance process (for the displayed jobs). To view only mailings for statements in the mailing which have been finalized, set status to "FIN - Finalized." To display all postage statements waiting for USPS processing, click the "UPD-USPS Processing Due". An alternate way to view statements with a particular status is to click the number next to the desired status in the key at the bottom of the page in the Status Chart section.

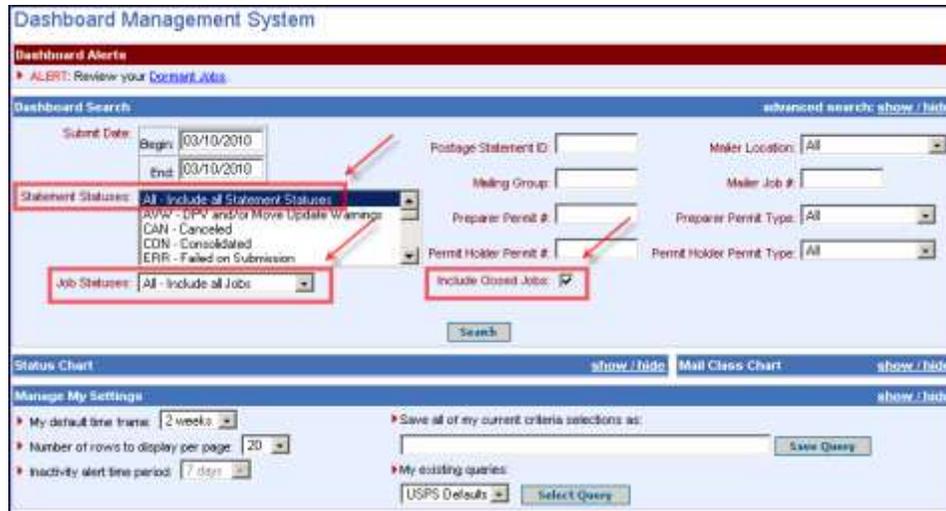


Figure 4-30: Dashboard Management System Search Page

4.5.2 Hard Copy Postage Statements

Mailing Agents can view and download manually entered (BMEU) statements on the dashboard if they are identified in the Mailing Agent section during postage statement entry by the permit types: PI, MT, PC, PE, GH, OI, OM, or PP. To call up hard copy postage statements select the following search criteria.

- Statement Statuses: Include all Statement Statuses
- Job Statuses: All – Include all Jobs
- Include Closed Jobs must be checked

Note: No other Search Criteria should be entered (leave blank).

Mail Owners can view and download manually entered (BMEU) statements on the dashboard ONLY if the mail owner is also identified in the Permit Holder section during postage statement entry. To call up hard copy postage statements select the following search criteria.

- Statement Statuses: Include all Statement Statuses
- Job Statuses: All – Include all Jobs
- Include Closed Jobs must be checked

Note: No other Search Criteria should be entered (leave blank).

To download the statement, select the “Job ID” hyperlink of the postage statement, and then select “Download Details” of the Job Detail Page.

Note: Metered (MT) and OMAS Metered (OM) permits cannot be used with manually entered (BMEU) Bound Printed Matter (BPM) postage statements

4.5.3 Electronic Postage Statements

Mailing Agents can view and download postage statements entered via Postal Wizard. They can be identified in the permit type: PI, MT, PC, PE, GH, OI, OM, or PP. Once the statement has been finalized by the BMEU, the following search criteria must be used:

- Statement Statuses: Select “FIN – Finalized Statement”
- Job Statuses: All – Include all Jobs
- Include Closed Jobs must be checked

Note: No other Search Criteria should be entered (leave blank).

Mail Owners can view and download postage statements entered via Postal Wizard by their Mailing Agents if they are also identified in the Permit Holder section. Once the statement has been finalized by the BMEU, the following search criteria must be used:

- Statement Statuses: Select “FIN – Finalized Statement”
- Job Statuses: All – Include all Jobs
- Include Closed Jobs must be checked

Note: No other Search Criteria should be entered (leave blank).

Note: Metered (MT) and OMAS Metered (OM) permits can not be used with Postal Wizard entered (BMEU) Bound Printed Matter (BPM) postage statements.

Q	Job ID	Mailing Group #	Postage Statement ID	Verification Due	Mailing Date	Submit Date	Ad/Publication Name	Permit/STPS Number	Mail Class	Piece	Postage	Job Status
+	AJNDPDK	8985	Multiple	No	05/05/2009	05/08/2009	05420-ANQ-ANNAIS 08-2 TEST	PP 61	PE	88,557	\$26,638.75	UPD
+	AJNDPFC	8982	Multiple	No	05/05/2009	05/08/2009	05420-ANQ-ANNAIS 08-2 TEST	PP 72	PE	88,557	\$38,989.98	UPD
+	AJNDMM	89877	Multiple	No	Multiple	05/08/2009	48612 DDC LHM DEC08	Multiple	Multiple	2,284	\$1,855.87	Multiple
+	LMCDTQ	89868	Multiple	No	05/08/2009	05/07/2009	0500-AM-7.R1	Multiple	FC	573,884	\$348,532.44	UPD
-	MAKONFU	89650	PS# 544815		05/05/2009	05/07/2009	SPECIAL OLYMPICS INC / AAA PP ACCOUNT	R 55	FC	5,013	\$1,821.11	UPD
+	AKTAPFD	89847	Multiple	No	06/02/2009	05/07/2009	048953C	PE 58	PE	28,338	\$11,925.13	UPD
-	STDMRHS	89845	PS# 544795		05/05/2009	05/07/2009	PERFL S SAOHS Z LEVEL / AAA PP ACCOUNT	R 55	SM	12,500	\$2,750.00	UPD

Figure 4-31: From the Dashboard when the user enters the search criteria, all Job IDs display accordingly. (Postage amounts are for illustration purposes only.)

The user can click on the plus sign to the left of a Job ID to review a job that comprises multiple statements (Figure 4-31). To access the single postage statement, the user must click on the postage statement ID. Other Jobs can already be at the single postage statement level; the user can click on the statement ID to access it directly. Postage statements belonging to a combined mailing is shown in figure 4-32. When the plus mark is clicked (to expand the view), the single postage statement belonging to a combined mailing is marked with the ID suffix, “cid”.

Note: A mailing group identifies the mailing documents submitted at one time by a single mailer. Mailing group numbers can include one or more postage statements. The *PostalOne!* system assigns mailing group numbers, which are unique to a particular group of documents. If a mailer uses the “Complete a Mailing Form” feature to submit a manual postage statement, the statement’s unique identifier “Mailing Group ID” displays after the statement has been successfully submitted.

The screenshot shows the USPS Business Customer Gateway interface. On the left is a navigation menu with options like Home, Summary, Balance and Fees, Postal Wizard, Electronic Data Exchange, Mailing Reports, Dashboard, and Manage Permits. The main area displays 'Search Results' with a table of 14 jobs found. The table has columns for Job ID, Mailing Group ID, Postage Statement ID, Postage Due, Mailing Date, Initial Date, Job/Postage Item, Periodicals, Mail Class, Amount, Postage (\$), and Job Status. A red arrow points to a row with Job ID 69264798 and Postage Statement ID PSA 70013861 (07025).

Job ID	Mailing Group ID	Postage Statement ID	Postage Due	Mailing Date	Initial Date	Job/Postage Item	Periodicals	Mail Class	Amount	Postage (\$)	Job Status
69264803	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,294.79	UPD
69264802	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,294.79	UPD
69264801	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,777.79	Multiple
69264900					06/15/2009	20090008		PE	132,225		
69264798	Multiple	No	No	06/16/2009	06/15/2009	20090008	Multiple	PE	132,225	\$46,294.79	UPD
69264798	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,294.79	UPD
PSA 70013861 (07025)				06/16/2009	06/15/2009	20090008	PE 0200	PE	33,683	\$10,756.20	UPD
PSA 70013863 (07025)				06/16/2009	06/15/2009	20090008	PE 17000	PE	45,851	\$14,805.17	UPD
PSA 70013860 (07025)				06/16/2009	20090008		PE	132,225		NA	UPD
PSA 70013862 (07025)				06/16/2009	06/15/2009	20090008	PE 38700	PE	32,891	\$20,504.42	UPD
69264791				06/16/2009	20090008		PE	132,225			
69264791	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,888.81	FIN
69264790	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$47,888.81	FIN
69264758	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$47,252.98	FIN
69264671	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$48,883.81	FIN
69264607	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,294.79	FIN
69264130				06/15/2009	20090008		PE	132,225			
69264036	Multiple	No	No	Multiple	06/15/2009	20090008	Multiple	PE	132,225	\$46,294.79	Multiple

Figure 4-32: A Job comprising a combined mailing with multiple statements is accessible at the single postage level from the Dashboard. (Postage amounts are for illustration purposes only.)

4.6 Cancelling Postage Statements

Postage statements which display on the Dashboard are those that have been submitted by electronic documentation (e.g., Postal Wizard, Mail.dat, and Mail.XML). These can be cancelled from the Dashboard. Note: For combined mailings the system displays a Cancel button at the combined mailing, master statement level. For jobs comprising multiple statements, the system displays a Cancel button at the single postage statement level. For hard copy postage statements, entered by the Postal Service acceptance clerk, the statement will be in status “FIN – Finalized Statements”, and cannot be accessed or canceled.

Postal clerks can only finalize (process for billing) UPD postage statements. If a statement should not be finalized for whatever reason and are not in “FIN – Finalized Statements”, or “FPP - Finalized Pending Payment” for Periodicals CPP, mailers are recommended to cancel the job. This keeps the Postal Service clerk’s dashboard updated, reflecting only those statements that require processing.

Note: For postage statements that have been finalized by the acceptance clerk, those statements will drop out from the original list of search results on the Dashboard. You will need to recall statements in the status of “FIN – Finalized Statements” by performing a new search, selecting the “Include Closed Jobs” checkbox.



Figure 4-33: Search filters help to locate the statement to be cancelled

Search Results

37 jobs found, displaying 17 of 37.
(Exported 1 of 37 rows)

Job ID	Mailing Label	Postage Statement ID	Mailing Date	Issue Date	Postage Statement Name	Postage Statement ID	Postage	Postage	Postage	Postage
MANUAL	1000004	PS# 1001100	01/10/2009	01/10/2009	ACTIVATED MAILING SYSTEMS INC	PS# 1000004	FC	4,000	\$1,100.00	PS#
MANUAL	1000005	PS# 1001100	02/11/2009	02/11/2009	PSMA, PSMA	PS# 1000005	SM	8,213	\$1,623.48	PS#
MANUAL	1000006	PS# 1001100	02/11/2009	02/11/2009	PSMA, PSMA	PS# 1000006	SM	8,213	\$1,623.48	PS#
MANUAL	1000007	PS# 1001100	01/10/2009	01/10/2009	ACTIVATED MAILING SYSTEMS INC	PS# 1000007	FC	2,400	\$660.00	PS#
MANUAL	1000008	PS# 1001100	01/10/2009	01/10/2009	ACTIVATED MAILING SYSTEMS INC	PS# 1000008	FC	1,600	\$368.00	PS#
MANUAL	1000009	PS# 1001100	01/10/2009	01/10/2009	AUTO WEB - ACTIVATED MAILING SYSTEMS INC, Domestic & International Mail (PSMA-DA-FC)	PS# 1000009	FC	90,000	\$21,312.00	PS#
MANUAL	1000010	PS# 1001100	01/10/2009	01/10/2009	Target 11000	PS# 1000010	FC	281,400	\$91,830.00	PS#
MANUAL	1000011	PS# 1001100	01/10/2009	01/10/2009	MAIL-IT PLUS	PS# 1000011	FC	800	\$102.00	PS#
MANUAL	1000012	PS# 1001100	01/10/2009	01/10/2009	ACTIVATED MAILING SYSTEMS INC	PS# 1000012	SM	1,000	\$368.00	PS#

Figure 4-34: Postage statements are accessed by the Postage Statement ID (PS#). (Postage amounts are for illustration purposes only.)

Manage Mailing Activity

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

Home > Mailing Reports > Pending Postage Statements > Preparing to Cancel # 55893932

Please review the statement below before cancelling. If you do not wish to cancel this statement, use the Back button on your browser. Press Cancel at the bottom of this page to submit the cancellation request.

Statement Information

PS Form 3602-P - Standard Mail - Postage Affixed **Planned**

Permit Holder:	FDWA 123 FAKE STREET ROANOKE, VA 24012-8023 Contact: GERALD WILL (703) 292 - 3722	Mailing Agent:	WILLIAMS PERFECT MAILINGS 5918 UNION RIDGE CT ADAMSTOWN, MD 21710-9463 Telephone: (703) 332-4127	Org. For Mailing is Prepared:	FDWA 123 FAKE STREET ROANOKE, VA 24012-8023 Telephone: (703) 292-3722
Permit Holder's Permit:	CMAS Meters 90200	Mailing Agent's Permit:	Permit Imprint 50	Processing Category:	Flats
Post Office Of Mailing:	ROANOKE VA 24022	Mailer Provided Mailing Date:	12/11/2009	Weight of Single Piece:	0.0231 lbs.
Total Pieces:	5,013 pcs	Total Weight:	115.8003 lbs.	Total Postage:	\$ 1,923.45
Additional Postage Permit:		Price at which Postage is Affixed:	Correct		
Sequencing Date:	10/01/2009	Address Matching Date - Automation:	10/01/2009	Address Matching Date - Carrier Route:	10/01/2009
No of Containers:	1' MM Trays: 3083133	2' MM Trays:	2' EMM Trays: 9	Flat Trays:	Sacks: Pallets: 1 Other: 2
Customer Reference ID:	3083133				
Federal Agency Cost Code:	12387				
Statement Sequence No:	3083136				

Part B - Automation Flats

Line Number	Entry Discount	Title	Description	Price	Quantity	Postage
B1	None	5-Digit	Flats 3.3 oz (0.2053 lbs) or less	0.340	1058 pcs.	\$ 373.658
B2	None	3-Digit	Flats 3.3 oz (0.2053 lbs) or less	0.418	591 pcs.	\$ 242.858
B3	None	ADC	Flats 3.3 oz (0.2053 lbs) or less	0.480	179 pcs.	\$ 86.994
B4	None	Mixed ADC	Flats 3.3 oz (0.2053 lbs) or less	0.490	1 pcs.	\$ 0.490
B5	DNDC	5-Digit	Flats 3.3 oz (0.2053 lbs) or less	0.312	565 pcs.	\$ 176.280
B6	DNDC	3-Digit	Flats 3.3 oz (0.2053 lbs) or less	0.384	1014 pcs.	\$ 389.376
B7	DNDC	ADC	Flats 3.3 oz (0.2053 lbs) or less	0.452	1014 pcs.	\$ 458.328
B8	DNDC	Mixed ADC	Flats 3.3 oz (0.2053 lbs) or less	0.462	1 pcs.	\$ 0.462
B23		Standard Mail Automation Flats Subtotal (Lines B1-B22)				\$ 1,928.420
B24		Number of pieces that comply	Full Service Intelligent Mail Option	0.001	5013 pcs.	\$ -0.013
						Part B Total (Line B23 minus B24) \$ 1,923.449
						Total Postage From All Parts: \$ 1,923.449
						Total Postage: \$ 1,923.45
						Total Postage Affixed: \$ 1,923.450
						Net Postage Due: \$ 0.000
						Net Postage Adjustment Transaction Amount: \$ 0.00

USPS Use Only

Perform Verification: Verification data not available at this time.

One Pass/Two Pass Verification

Received: Error Percentage: 0 Additional Postage: \$ 0.00

AIRC: Cost Avoidance: 0 Verifying Employee's Name:

Total Additional Postage: \$ 0.00 Number of Revoked Pieces:

Click Back to return to the previous page. Click Cancel to submit the cancellation request for this postage statement.

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

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Figure 4-36: To cancel the postage statement, the cancel button must be selected. (Prices and postage amounts are for illustration purposes only.)

Upon the user selecting the 'Cancel' button, the user is required to click the 'Cancel' button on the subsequent pop-up cancel window (Figure 4-37).

Home > Mailing Reports > Pending Postage Statements > Preparing to Cancel # 5089932

Please review the statement below before cancelling.
If you do not wish to cancel this statement, use the Back button on your browser.
Press Cancel at the bottom of this page to submit the cancellation request.

Statement Information

PS Form 3602-P - Standard Mail - Postage Affixed **Planned**

Permit Holder:	FDIA 123 FAKE STREET ROANOKE, VA 24012-8023 Contact: GERALD RILL (703) 292-3722	Mailing Agent:	WILLIAMS PERFECT MAIL/NOB 5516 UNION RIDGE CT ADAMSTOWN, MD 21710-9483 Telephone: (703) 502-4127	Org. For Mailing is Prepared:	FDIA 123 FAKE STREET ROANOKE, VA 24012-8023 Telephone: (703) 292-3722
Permit Holder's Permit:	CLASS Allowed 80000	Mailing Agent's Permit:	Permit Import 85	Processing Category:	Rate
Post Office Of Mailing:	ROANOKE VA 24022	Master Provided Mailing Date:	12/11/2009	Weight of Single Piece:	0.021 lbs.
Total Pieces:	5,013 pcs.	Total Weight:	115.0003 lbs.	Total Postage:	\$ 1,823.45
Additional Postage Permit:		Rate at which Postage is Affixed:	Correct		
Sending Date:	12/01/2009	Address Matching Date - Automation:	12/01/2009	Address Matching Date - Carrier Route:	12/01/2009
No. of Containers:	1 484 Trays	2 484 Trays:		Other:	3
Customer Reference ID:	3083100				
Federal Agency Cost Code:	1207				
Statement Sequence No:	309138				

Message from webpage

Are you sure you want to cancel this postage statement?

Line Number	Entry Description	Title	Rate	Weight	Quantity	Postage
B1	None	5-Digit				\$ 273.000
B2	None	3-Digit				\$ 242.000
B3	None	ADC				\$ 55.954
B4	None	Mixed ADC				\$ 5.490
B5	DHDC	5-Digit	Plats 3.3 oz (3.2963 lbs) or less	0.312	665 pcs.	\$ 178.200
B6	DHDC	3-Digit	Plats 3.3 oz (3.2963 lbs) or less	0.384	1014 pcs.	\$ 389.370
B7	DHDC	ADC	Plats 3.3 oz (3.2963 lbs) or less	0.452	1014 pcs.	\$ 458.520
B8	DHDC	Mixed ADC	Plats 3.3 oz (3.2963 lbs) or less	0.482	1 pcs.	\$ 3.462
B23		Standard Mail Automation Plate Subtotal (Lines B1-B22)				\$ 1,529.400
B24		Number of pieces that empty	Full Service Intelligent Mail Option	0.001	5013 pcs.	\$ 4.013
						Part B Total (Line B23 minus B24): \$ 1,823.448
						Total Postage From All Parts: \$ 1,823.448
						Total Postage: \$ 1,823.45
						Total Postage Affixed: \$ 1,823.450
						Net Postage Due: \$ 0.000
						Net Postage Adjustment Transaction Amount: \$ 0.00

USPS Use Only

Perform Verification:	Verification data not available at this time.		
One Pass/Two Pass Verification			
Received:	Errs Percentage:	0 Additional Postage:	\$ 0.00
AIRC:	Cost Avoidance:	0 Verifying Employee's Name:	
Total Additional Postage:	\$ 0.00 Number of Reworked Pieces:		

[Back](#)
[Cancel](#)

Click Back to return to the previous page. Click Cancel to submit the cancellation request for this postage statement.

[Home](#) | [Site Map](#) | [Help](#) | [Customer Care](#) | [Feedback](#) | [Sign Out](#)

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Figure 4-37: The PostalOne! System displays one final pop-up warning before cancelling the postage statement. (Postage amounts are for illustration purposes only.)

UNITED STATES POSTAL SERVICE®

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 > Mailing Reports > Pending Postage Statements > Canceled # 5089932

Postage Statement # 50556475 in Mailing Group # 5089932 has been canceled.

[Home](#) | [Site Map](#) | [Help](#) | [Customer Care](#) | [Feedback](#) | [Sign Out](#)

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Figure 4-38: A Cancel Receipt is displayed upon successful cancellation

UNITED STATES POSTAL SERVICE®

HOME | HELP | CUSTOMER CARE | SIGN OUT

Dashboard Management System

Search Results

My Search Criteria: [Search](#) [Help](#)

Legend: [1] for postage adjustment [2] for USPS adjusted entry [3] for Full Service statements [3] for Basic Service statements

21 jobs found, displaying 21 of 21
 23/2001 3/2001

Job ID	Market (Cross ID)	Postage Statement ID	Verification Type	Media Date	Submit Date	Job/Publication Name	Product/STS	Mag Class	Printed	Postage (\$)	Statement Status
000000	000000	000000000	WE	11/02/09	11/02/09	AUTOMATED MAILING SYSTEMS INC.	H 78	FC	4,800	\$1,103.30	PN
000000	000000	000000000	F	12/11/09	11/02/09	FDWA, FDWA	DR 8000	SR	2,013	\$1,823.45	UPD
000000	000000	000000000	F	12/11/09	11/02/09	FDWA, FDWA	DR 8000	SR	2,013	\$1,823.45	CAN
000000	000000	000000000	WE	11/02/09	11/02/09	AUTOMATED MAILING SYSTEMS INC.	H 78	FC	2,000	\$894.20	PN
000000	000000	000000000	WE	11/02/09	11/02/09	AUTOMATED MAILING SYSTEMS INC.	H 78	FC	1,000	\$338.50	PN
000000	000000	000000000	F	11/02/09	11/02/09	AUTO WEEK / AUTOMATED MAILING SYSTEMS INC. (Verifac Issue No 1 Issue Date 2009-04-31)	FE 12450	FE	36,688	\$23,312.20	UPD
000000	000000	Multiple	No	11/02/09	11/02/09	merged 11/09	Multiple	FC	262,036	\$413,433.86	SPB
000000	000000	000000000	WE	11/02/09	11/02/09	MAIL PLUGS	FC 1005	SR	300	\$128.10	PN
000000	000000	000000000	WE	11/02/09	11/02/09	AUTOMATED MAILING SYSTEMS INC.	H 78	SR	1,000	\$266.50	PN

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

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

Status Chart [Show / Hide](#) [Add Class Chart](#) [Show / Hide](#)

Figure 4-39: The postage statement displays on the Dashboard as cancelled in “CAN” status. (Postage amounts are for illustration purposes only.)

5. Reports (PostalOne!)

The Mailing Reports menu page provides access to a variety of reports, including View Transactions, Mailing Summary Report, Pending Postage Statements and the Issue Level Postage Statement Report for Periodicals. These can be accessed by clicking on the links from the reports menu page (Figure 5-1: Mailing Reports Menu).

Postage statements submitted via the Postal Wizard and through electronic documentation using Mail.dat and Mail.XML are visible through a variety of mailing reports (Figure 5-1: Mailing Reports Menu).

- View Transactions (lists all transactions using Postal Wizard, Mail.dat or Mail.XML entry)
- Mailing Summary Report (summarizes all postage statements in a designated time period for a particular permit using Postal Wizard, Mail.dat or Mail.XML entry)
- Issue Level Postage Statement (sums the issue level postage for all Periodicals postage statements submitted via the acceptance office, using Postal Wizard, Mail.dat or Mail.XML entry)
- Pending Postage Statements (Only postage statements electronically submitted using Postal Wizard features appear in this list. This report can be used to find the Mailing Group ID that must be communicated to acceptance personnel with a mailing.)

5.1 View Transactions

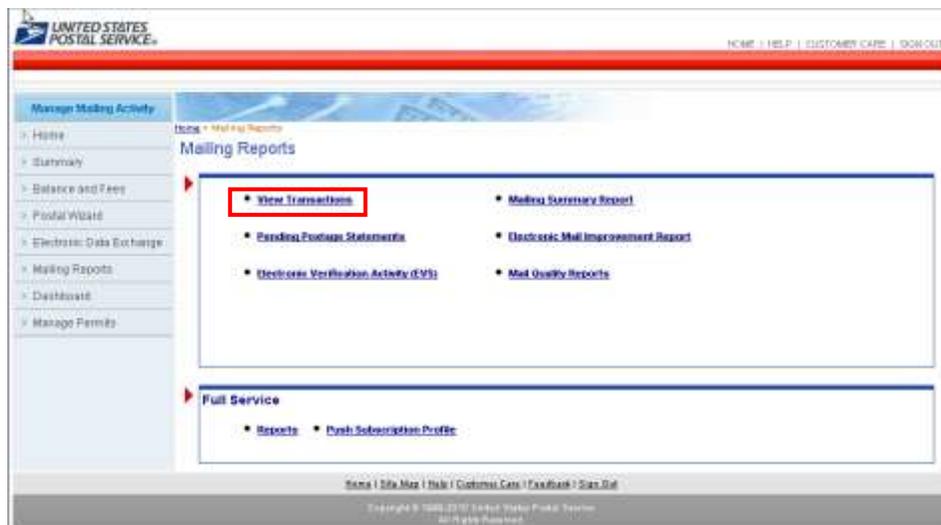


Figure 5-1: Mailing Reports Menu

UNITED STATES POSTAL SERVICE

HOME | HELP | CUSTOMER CARE | SIGN OUT

Manage Mailing Activity

Home - Mailing Activity - View Transactions

Transactions

The date range for any search must be 125 days or less. Transactions only appear in MyReport for 1 year and 1 month after the transaction date. If you need to retain the data for a longer period of time, please download the data while it is available and store the information on your computer.

Display by: Transactions

Location	Transaction Type	Account Type	Permit / Fee Number
AT&T SERVICES INC	AE	AE	
Customer Reference Number	Start Date	End Date	
	08/30/2011	11/03/2011	SEARCH

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

Permit	Post Office	Date	Transaction Type	Postage	Statement#	Customer/Reference ID	Begin Balance	Amount	End Balance	Plan#	Download
012448	KANSAS CITY, MO	11/03/2011	AE	77301300	na		0x48 -32,785.77	Exch 80593	0x48	80593	POA
014877	HARTFORD, CT	11/03/2011	AE	77381855	na		0x48 -1,785.09	Exch 1025	0x48	1025	JIR
014877	HARTFORD, CT	11/03/2011	AE	77381282	na		0x48 89,887.88	Exch 283288	0x48	283288	JIR
011744	SACRAMENTO, CA	11/03/2011	AE	77360159	AT&T Service Inc Sacramento		0x48 -1,92.83	Exch 23	0x48	23	ENL
011744	SACRAMENTO, CA	11/03/2011	AE	77370856	AT&T Service Inc Sacramento		0x48 2,288.00	Exch 1640	0x48	1640	ENL
011744	SACRAMENTO, CA	11/03/2011	AE	77373345	AT&T Service Inc Sacramento		0x48 317,042.08	Exch 870893	0x48	870893	ENL
012388	HOUSTON, TX	11/03/2011	AE	77361300	13355		0x48 -230.00	Exch 83	0x48	83	AM
012388	HOUSTON, TX	11/03/2011	AE	77366670	16388		0x48 -574.70	Exch 461	0x48	461	AM
012388	HOUSTON, TX	11/03/2011	AE	77366403	16388		0x48 196,015.88	Exch 837775	0x48	837775	AM
01888	ALPHARETTA, GA	11/03/2011	AE	77369740	13192		0x48 2,171,785.83	Exch 823883	0x48	823883	CPV

Figure 5-2: (View) Transactions landing page: user clicks a PS Form under the Transaction Type

The (View) Transaction Report displays all transactions for permits that are linked to the locations in the User's profile. These transactions include postage statement transactions that have been finalized (billed) by Postal Service acceptance personnel. Users can access postage statement details under Transaction Type (Figure 5-2). Note that the date range for any search must be 125 days or less from the system date. Transactions only display on this report for one year and one month after the transaction date. If a user needs to retain the data for a longer period of time, there is a download option where the data can be stored on the user's desktop (Figure 5-3).

Note. For Periodicals (PS Form 3541) mail entered via Mail.dat, the download options will show postage statement, Edition Weight Worksheet and Ad Percent Worksheet. Any Periodicals mail entered via Mail.XML or Postal Wizard or BMEU will show only a download option for the postage statement. This is because these modes of entry do not offer Edition Weight Worksheet and Ad Percent Worksheet features.

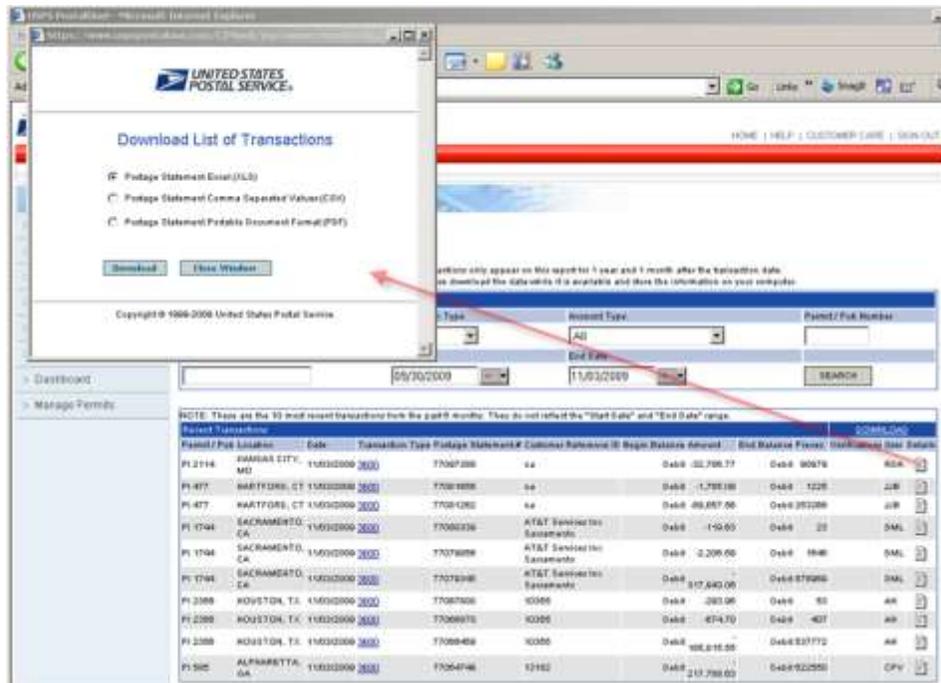


Figure 5-3: Download Options include: .XLS, .CVS and .PDF



Figure 5-4: User selects a Postage Statement Form 3600 which displays from Transactions landing page. (Postage amounts are for illustration purposes only.)

5.2 Mailing Summary Report

The Mailing Summary Report summarizes all postage statements in a designated time period for a particular permit when electronic documentation is received by Postal Wizard, Mail.dat or Mail.XML entry. A user can select a (postage statement) form type or an individual location to refine the search. The user is required to select the account type and enter a permit or publication number. The report defaults to a two week date

range, but the user can enter a specific date range to refine the search up to 365 days. The information that is presented includes the line item details from the postage statement.

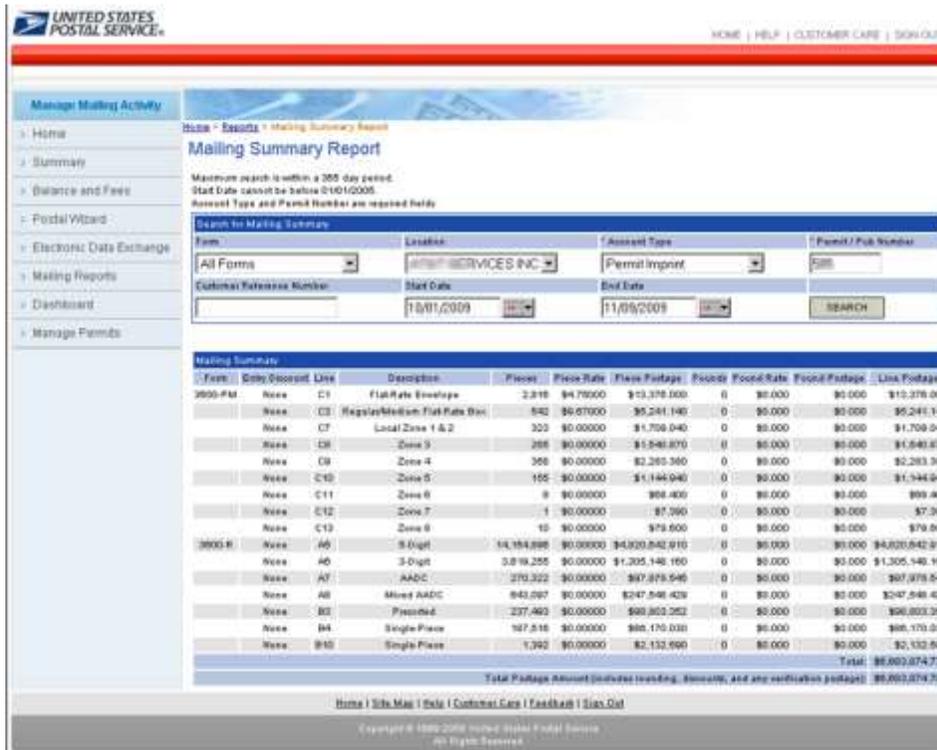


Figure 5-5: Mailing Summary Report. (Rates and postage amounts are for illustration purposes only.)

5.3 Issue Level Postage Statement

The Issue Level Postage Statement is for Periodicals publications. Single-issue or consolidated Periodicals postage statements that are ready for USPS processing or have already been finalized by USPS personnel are available for issue-level viewing. The Issue level postage statement sums the issue level postage for Periodicals postage statements which have been submitted to the acceptance office using the Postal Wizard, Mail.dat or Mail.XML. 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 and for a full sequence of screen pages, refer to the User Access to Electronic Mailing Information Reports Guide, vol. II, chapter 5, Periodicals Reports.

5.4 Pending Postage Statements

If the postage statement has not been verified and accepted by the local post office or the BMEU, users can cancel pending postage statements. The Pending Postage Statement link under the Mailing Reports menu (Figure 5-6) allows users to view pending electronic postage statements submitted via all eDoc submission methods: Mail.dat, Mail.XML and the Postal Wizard. A user can also use this report to find the Mailing Group ID that must be presented to acceptance personnel with a mailing.

To view electronically-submitted postage statements in all stages, as well as supplemental reports for statements submitted using Mail.dat or Mail.XML use the Dashboard. The MERLIN Summary Report and Move Update Validation Report can both be accessed from the Pending Postage Statements page.

Postage statements can be cancelled by selecting the “X” under the View/Cancel column. The postage statement displays where the cancel button is presented at the bottom of the statement. Upon selecting the cancel button the system prepares begins the cancellation (Figure 5-7).



Figure 5-6: Pending Postage Statements. (Postage amounts are for illustration purposes only.)



Figure 5-7: Canceling a postage statement that is pending

5.5 Full-Service Verification Invoice Report

The *PostalOne!* system creates the Full-Service Verification Invoice Report 30 days after the job is completed in *PostalOne!* or 30 days after the date the last postage statement was finalized, whichever comes first. The *PostalOne!* system considers a job complete when the total pieces for finalized postage statements matches the total pieces in the qualification report. The Full-Service Verification Invoice Report provides information to identify the specific job found with errors and additional postage charges that will apply from discount removal. The report provides functionality to allow the eDoc submitter to make payment for the assessment or request reconciliation of the identified errors. The reconciliation request will be sent to Remediation Team/Help Desk for review: The Help Desk will review/investigate the reconciliation request and notify mailer of review results.

While the discount removal has not yet been activated, mailers are encouraged to take advantage of the reconciliation process and use the feedback to correct full-service verification errors prior to the implementation of the full-service discount removal. The timeframe for implementing the discount removal is under review, and will be announced in advance by the Postal Service. Mailings completed prior to the announced date will not be subject to loss of the full-service discount. See *A Guide to Intelligent Mail for Letters and Flats*, Section 5 for more information.

Note that a separate set of reports is generally available within 48 hours after the finalization of postage statements reports details on mail verification errors. These reports, known as “Full-Service Data Quality and Verification Reports”, are described in *Electronic Mailing Information and Reports Guide: Access to Electronic Mailing Reports*, in Chapter 4, “Full-Service Data Quality and Verification Reports.” The verification errors themselves are listed in *A Guide to Intelligent Mail for Letters and Flats*, Appendix D.

To access the Full-Service Verification Invoice Report, first log into the Business Customer Gateway and select the link for Verification Assessment Evaluator (PostalOne!) (Figure 5-8).

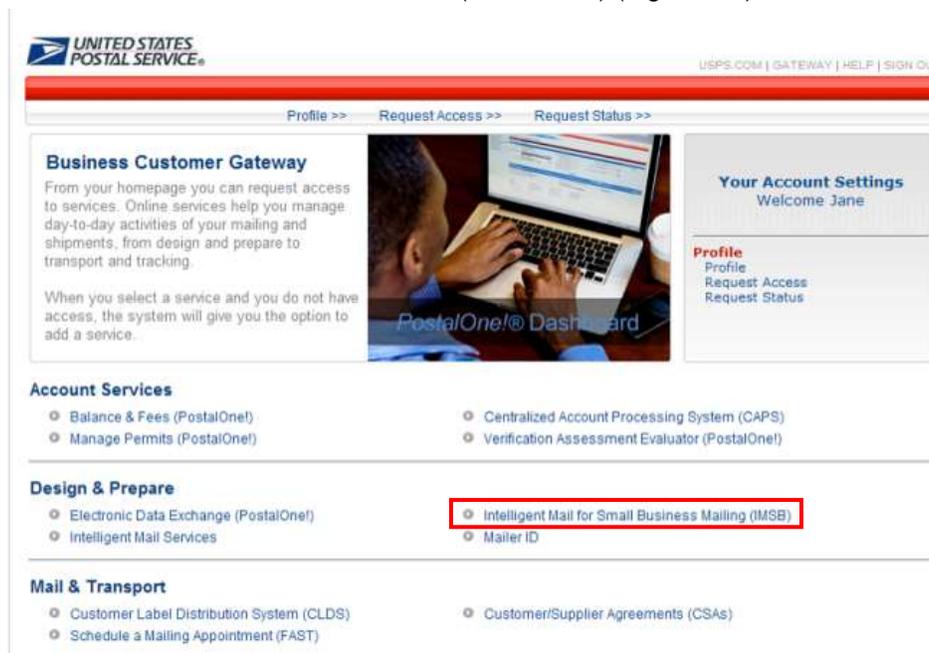


Figure 5-8: Business Customer Gateway with link for VAE

Select Full-Service Verification Invoice Report (Figure 5-9) and the system will display a set of search settings (Figure 5-10). Choose the settings and click **Execute Search** to see the details of eDocumentation verification assessments (Figure 5-11).



Figure 5-9: Full-Service Verification Invoice Report

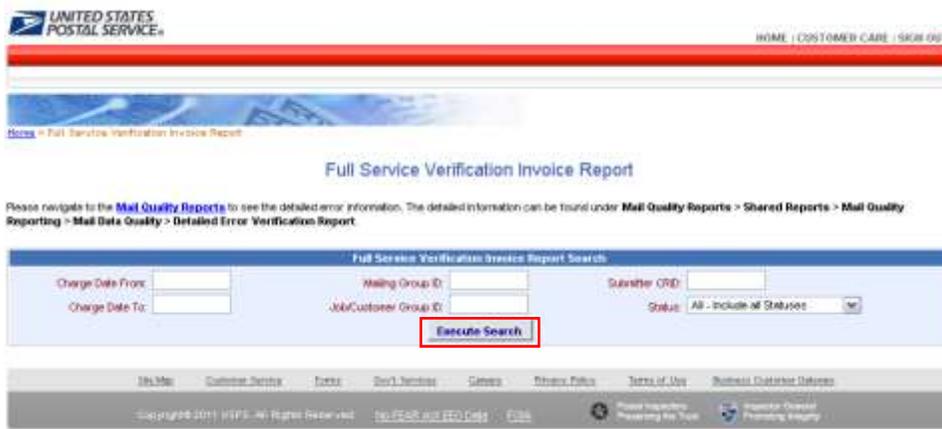


Figure 5-10: Search Settings for Full-Service Verification Invoice Report

For a job with a status of Unpaid, there are two options available: Pay the assessment or Request Review (Figure 5-11).

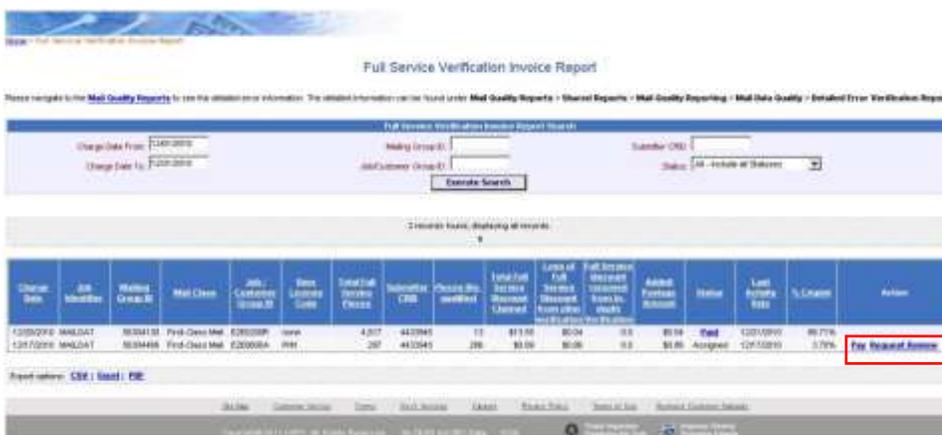


Figure 5-11: Full-Service Verification Invoice Report Example. (Postage amounts are for illustration purposes only.)

Selecting the Pay link displays the Confirm Payment window shown in Figure 5-12. In the Confirm Payment window, select the permit to pay from, either a permit associated with their CRID (profile) or a permit used in the mailing job itself.

Select one or more permits to make payments. Enter the amount in the “Amount (\$)” box, and select “Add”. You can continue to select other permits / amounts, entering them with “Add” until the amount added covers the assessment. Select “Confirm” to make payment (or Cancel) and return to the Full Service Error Report page.



Figure 5-12: Confirm Payment Example

From the Full-Service Verification Invoice Report window (Figure 5-11), selecting Request Review displays the window shown in Figure 5-13.

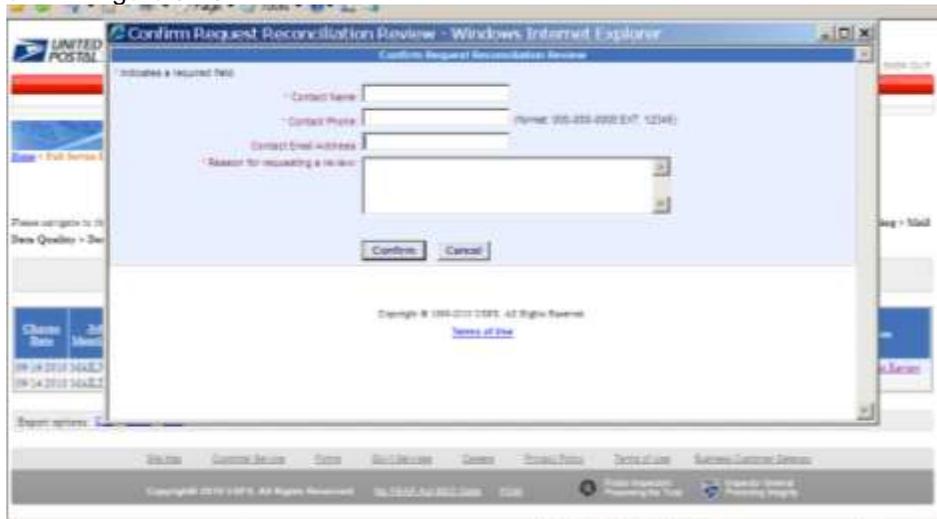


Figure 5-13: Confirm Request Reconciliation Review Example

6. Facility Access & Shipment Tracking (FAST)

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

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

The screens that follow demonstrate the general flow for creating the FAST hierarchy. Refer to Figure 6-1 through 6-4.

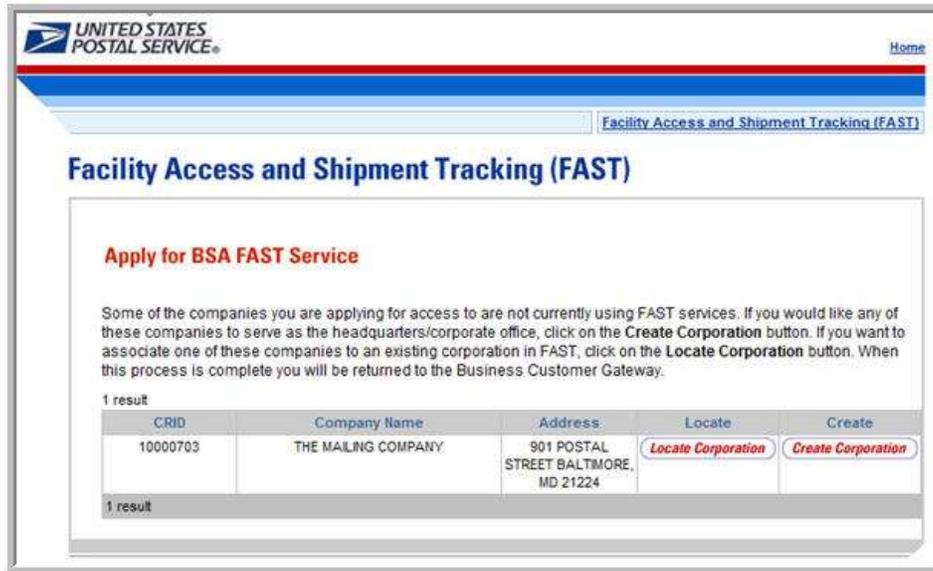


Figure 6-1: Applying for BSA FAST Service

To apply for BSA FAST Service, click the Confirm button on the bottom of the Apply for BSA FAST Service page to proceed. On the next screen, click the Locate Corporation button to proceed to the Apply for BSA FAST Service screen (Figure 6-1), where a user may enter a CRID to locate an existing corporation in FAST (Figure 6-2). Alternatively, the user may click the Create Corporation button to proceed to the Apply for BSA FAST Service page, where he/she may confirm that the company will be created as the headquarters/corporate office in FAST.

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

UNITED STATES
POSTAL SERVICE®

Home

Facility Access and Shipment Tracking (FAST)

Facility Access and Shipment Tracking (FAST)

Apply for BSA FAST Service

Please enter the exact Customer Registration Id (CRID) of the corporate entity using FAST services to associate the currently selected entity to.

Company Name: THE MAILING COMPANY
CRID: 10000703
Address 1: 901 POSTAL STREET
City: BALTIMORE
State: MD
ZIP Code: 21224

A CRID is a numeric identifier up to 15 digits.

* Customer Registration ID:

[< Back](#) [Search >](#)

Figure 6-2: Locating an Existing Corporation within FAST

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

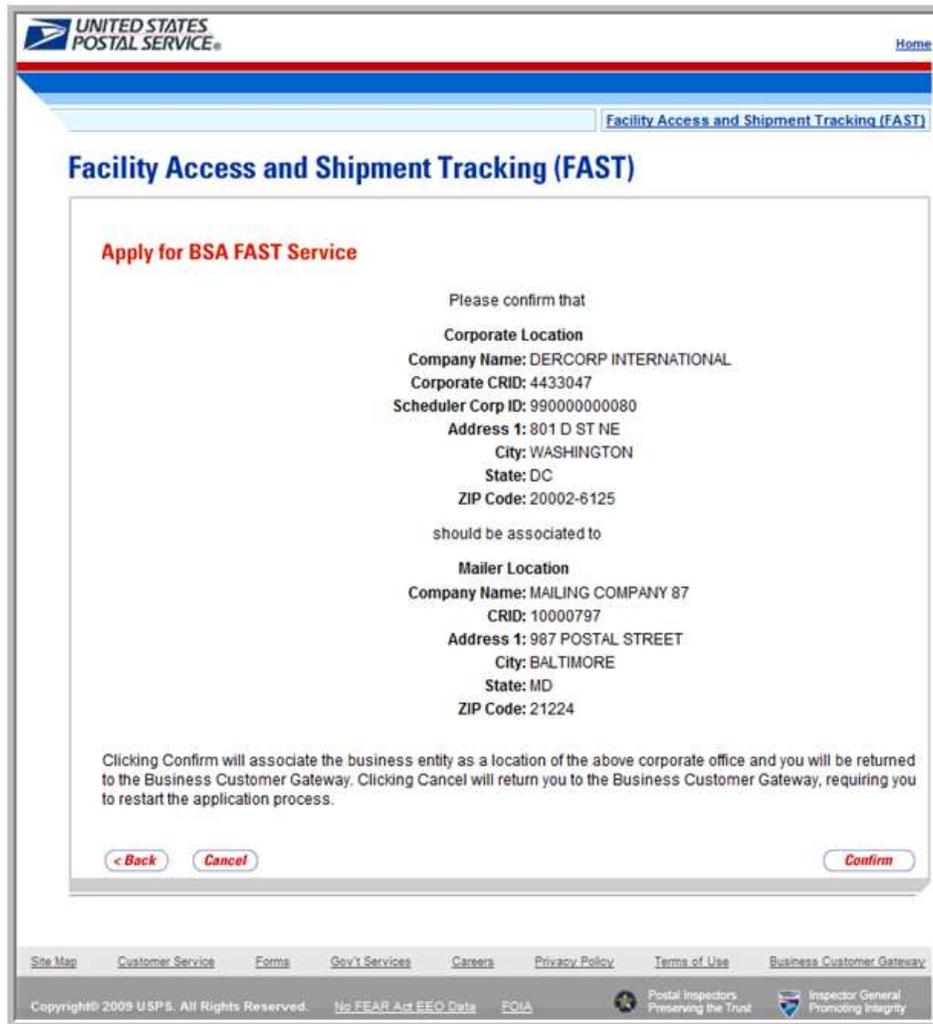


Figure 6-3: Confirming an Existing Corporation as the Headquarters/Corporate Office

If a user wishes to create a new corporation in FAST on the Apply for BSA FAST Service page (Figure 6-3), the user clicks the Confirm button to create a new corporation in FAST as the headquarters/corporate office and proceeds to the Business Customer Gateway page.

7. Test Environment for Mailers (TEM)

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

Mailers who elect to submit Mail.dat files will need to submit their Mail.dat files via the *PostalOne!* Mail.dat Client, a downloadable application that is available via the Business Customer Gateway.

Mailers who wish to participate in Full-service are required to submit Mail.dat or Mail.XML and pass test criteria in the TEM. Steps that guide mailers through the TEM are outlined in the *Test Environment for Mailers guides* on the [RIBBS®](http://ribbs.usps.gov) Web site at

http://ribbs.usps.gov/intelligentmail_gateway/documents/tech_guides/TEMCHECKLIST.pdf.

Mailers who are interested in testing Mail.XML must complete some preparatory work prior to entering TEM, such as developing or purchasing Mail.XML software, and obtaining the USPS-provided schemata i.e., Web Services Description Language (WSDL) and XML schema document and templates (XSD) used to ensure conformity and standardization of data exchange between the *PostalOne!* system and customers.

7.1 Accessing the TEM

To use the TEM a user must have a Mailer ID (MID) and CRID. For most customers, a MID can be requested through the Mailer ID system, accessed through the Gateway. The CRID is assigned by the Gateway customer registration system when an account is set-up by each user. To obtain a MID through the Mailer ID system, a customer must first request access to the Mailer ID system using the Gateway Request service access process (Refer to section 2.7 to learn more about new users requesting a service).

To access the TEM, a user must have access to the *Manage Mailing Activity* service. Once the request for the Manage Mailing Activity is approved, the user logs in to the Gateway and clicks on the “Electronic Data Exchange” link on the left-hand side menu of their homepage (Figure 7-1).

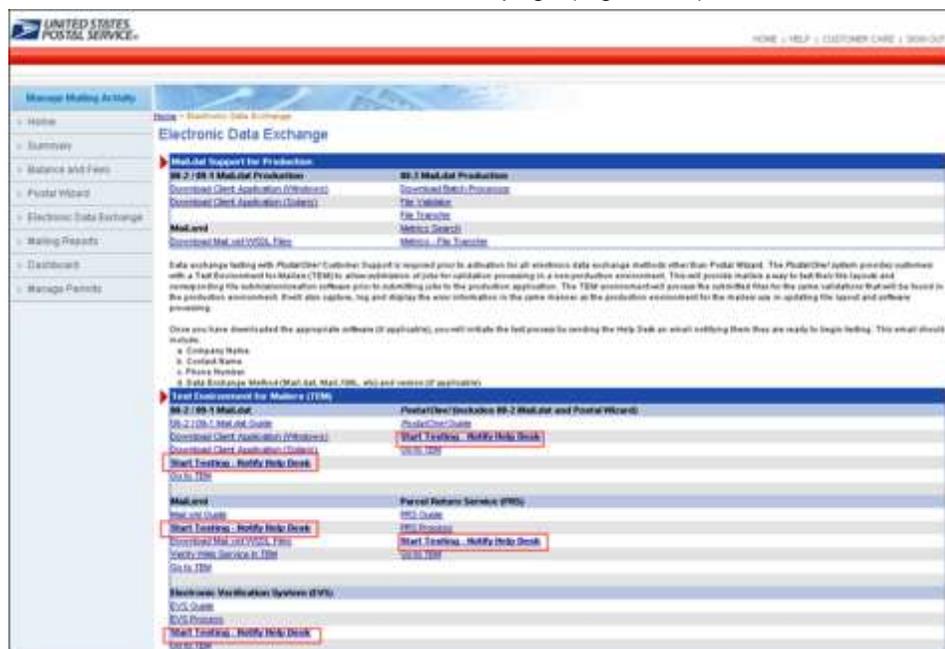


Figure 7-1: Electronic Data Exchange

7.2 The Test Environment for Mailers (TEM) Checklist and Troubleshooting

To successfully conduct testing in the TEM, we recommend following the *Test Environment for Mailers (TEM Checklist and Troubleshooting Guide)* posted on RIBBS®. This guide includes steps specific to Mail.dat and Mail.XML. It is designed to help mailers navigate the electronic documentation requirements and to assist with migrating to the Intelligent Mail full-service option. The checklist provides step-by-step tasks and accompanying worksheets for data set-up requests that ensure MIDs, CRIDs and Permits are appropriately linked and assigned. Steps include a review of suggested guides for technical considerations and constructing Intelligent Mail barcodes, making plans for feedback, establishing access to the Business Customer Gateway, designing and validating barcodes. The checklist also outlines the TEM process. The TEM process includes test scenarios for mailers to complete. This TEM guide also includes a troubleshooting section to assist mailers with identifying and correcting common errors. Refer to the Appendix A of this document for a model of the test criteria for First Class Mail; for all mail classes criteria go to the TEM Checklist and Troubleshooting guide on RIBBS® for comprehensive Test Criteria.

7.3 TEM Process

The following section describes the TEM process. The high level steps to complete the TEM process are summarized below, but the *Test Environment for Mailers (TEM) Checklist and Troubleshooting Guide* posted on RIBBS® is the recommended reference document for TEM.

TEM Process – A Quick Summary

- Submit Data Set-up Worksheet if necessary to clean-up CRIDs, MIDs and permits are correct or linked correctly.
- Log on to the Business Customer Gateway and access the TEM through the Electronic Data Exchange link.
- Begin practice runs using the test scenarios
- Notify the Help Desk by email to start the validation of test scenarios, after successful practice runs.
- Complete the TEM process by executing the test scenarios and meeting the criteria (the Help Desk monitors and records)
- Wait for authorization from a USPS representative to begin submitting full-service mailings.

To Access the TEM, the user clicks the “Go to TEM” link on the Electronic Data Exchange page to enter the TEM (Figure 7-2). A popup window will display, notifying the user is leaving the Business Customer Gateway (Figure 7-3). If the user clicks a “Go to TEM” link, the first screen to appear is the Summary Transaction Information page after clicking the Electronic Data Exchange link from the user’s homepage. This Summary screen is considered the TEM homepage (Figure 7-4). Once in TEM, to return to the Gateway the user can select the “HOME” link, located at the top right corner (Figure 7-3).

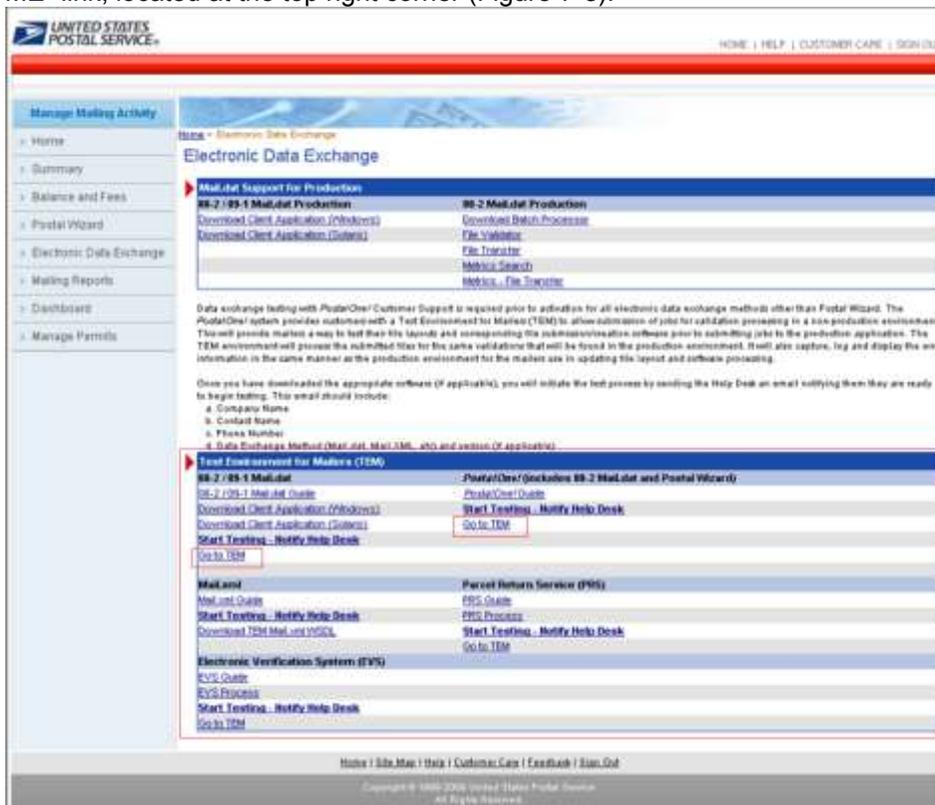


Figure 7-2: Go to TEM link

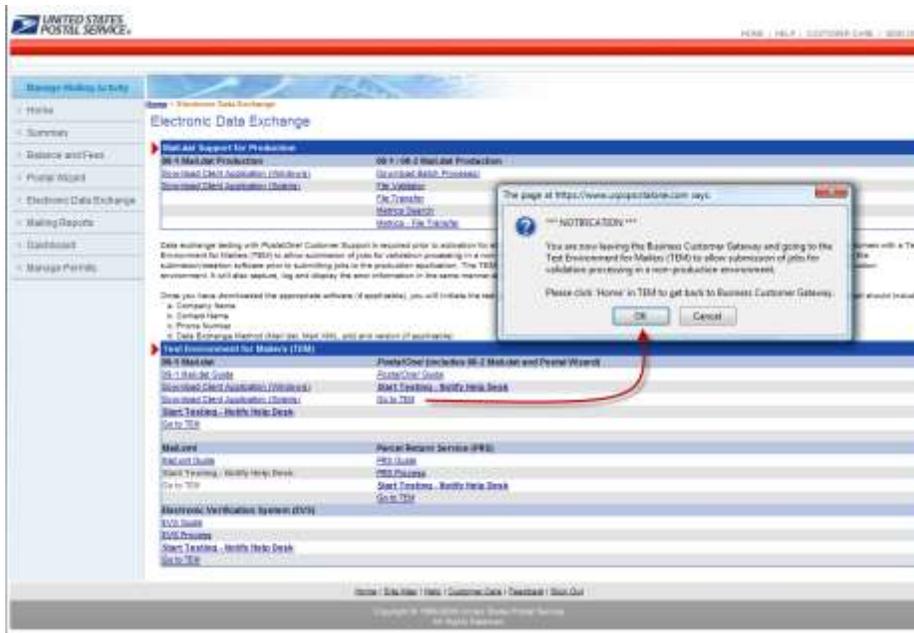


Figure 7-3: Leaving the Business Customer Gateway to enter the TEM

① **Enter the TEM.** Once inside the TEM, the user will have access to the same functionality as in the Production environment. Refer to the selection options under the Manage Mailing Activity menu. These supporting functions can be used when customers practice and execute the test scenarios.

- **Summary** (TEM homepage) to review transaction information (Figure 7-4)
- **Balance and Fees** (*PostalOne!*) to check balance and fees (Figure 7-5)
- **Dashboard** (*PostalOne!*) management system) to submit and view jobs electronically (Figure 7-6)
- **Electronic Data Exchange** to download client software (Figure 7-7)
- **Mailing Reports** (*PostalOne!*) to access *PostalOne!* reports (Figure 7-8)
- **Manage Permits** to manage permits (Figure 7-9)

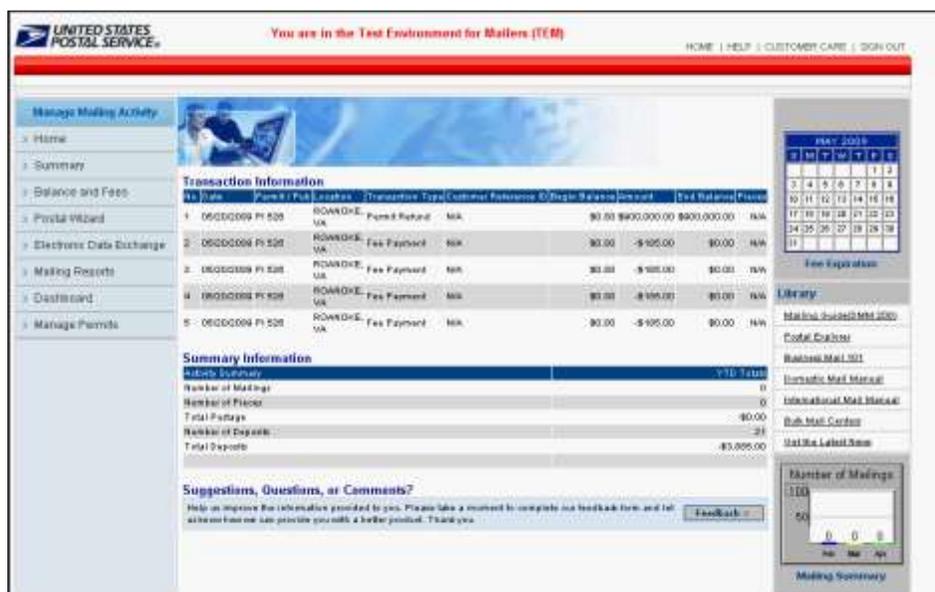


Figure 7-4: Summary page to review transaction information (TEM homepage)

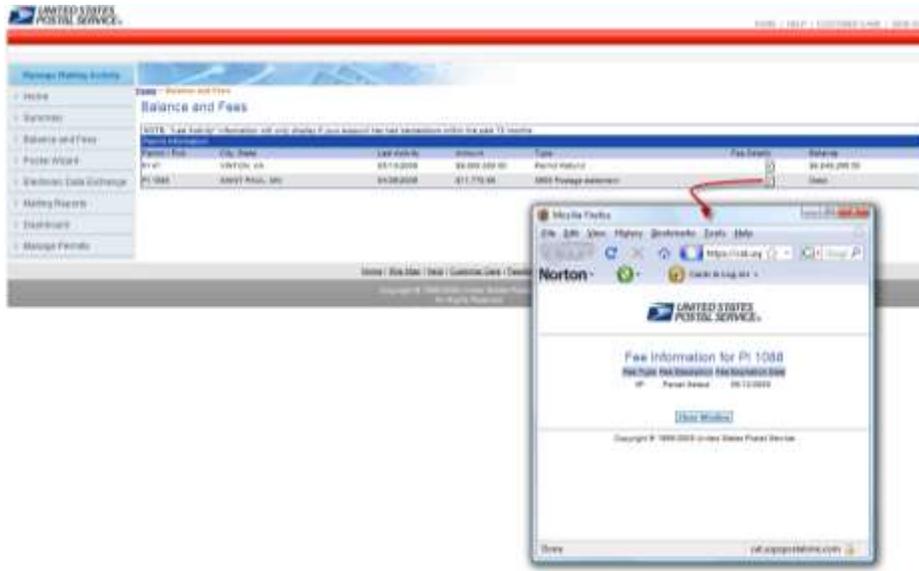


Figure 7-5: Balance and Fees to check balance and fees using *PostalOne!*

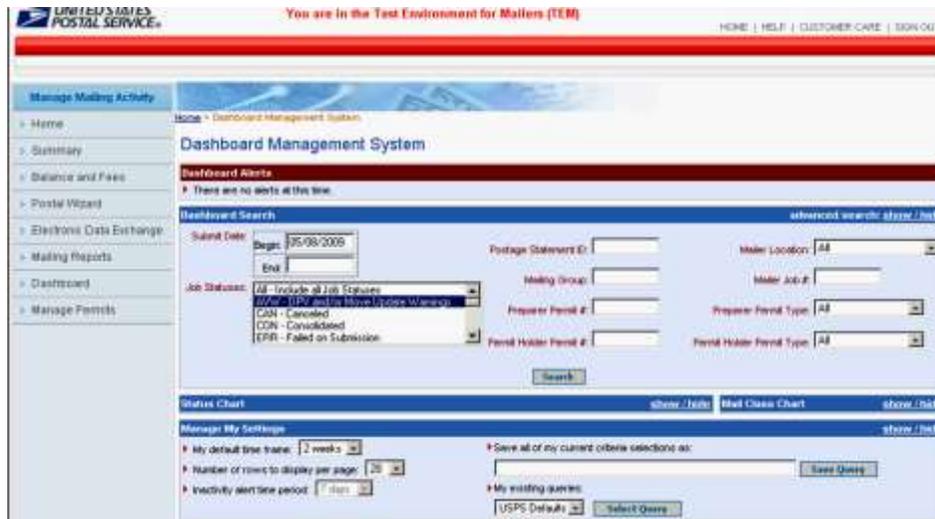


Figure 7-6: *PostalOne!* Dashboard

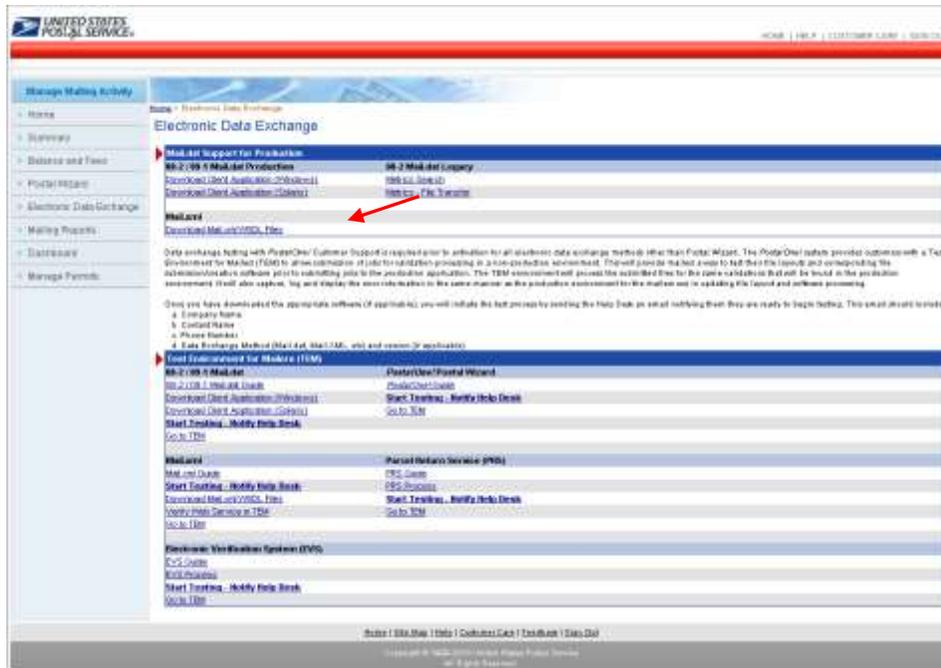


Figure 7-7: Download client software from the Electronic Data Exchange page

Mailers who submit Mail.dat 09-1, Mail.dat 11-1, or Mail.dat 11-2 files to the Postal Service do so using the downloadable *PostalOne!* Mail.dat Client. Refer to Chapter 3 of the Postal Service Mail.dat Technical specification for installation instructions and system requirements.

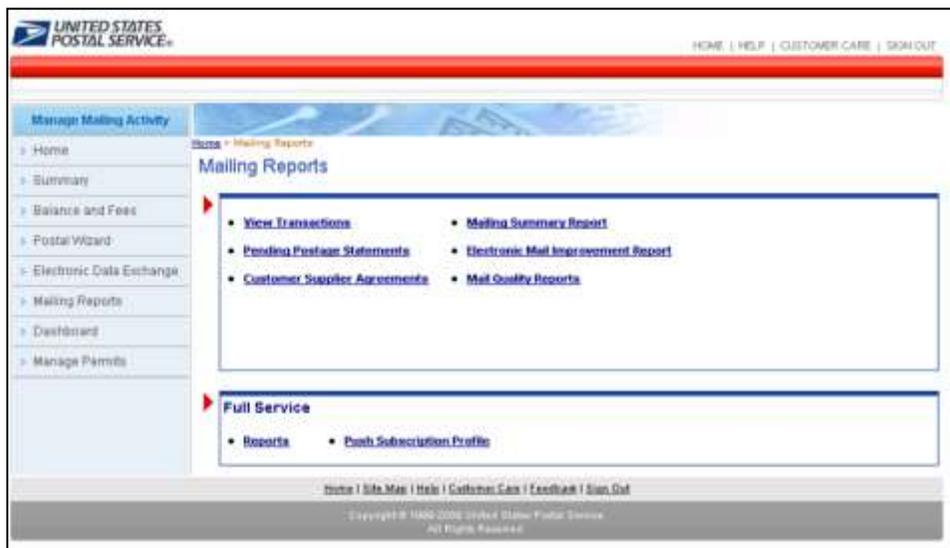


Figure 7-8: Mailing Reports to access *PostalOne!* Reports

Mail Quality Report and full-service mail quality information is also available in the MicroStrategy platform where the *PostalOne!* system provides the source data. See [Electronic Mailing Information and Reports Guide](#).

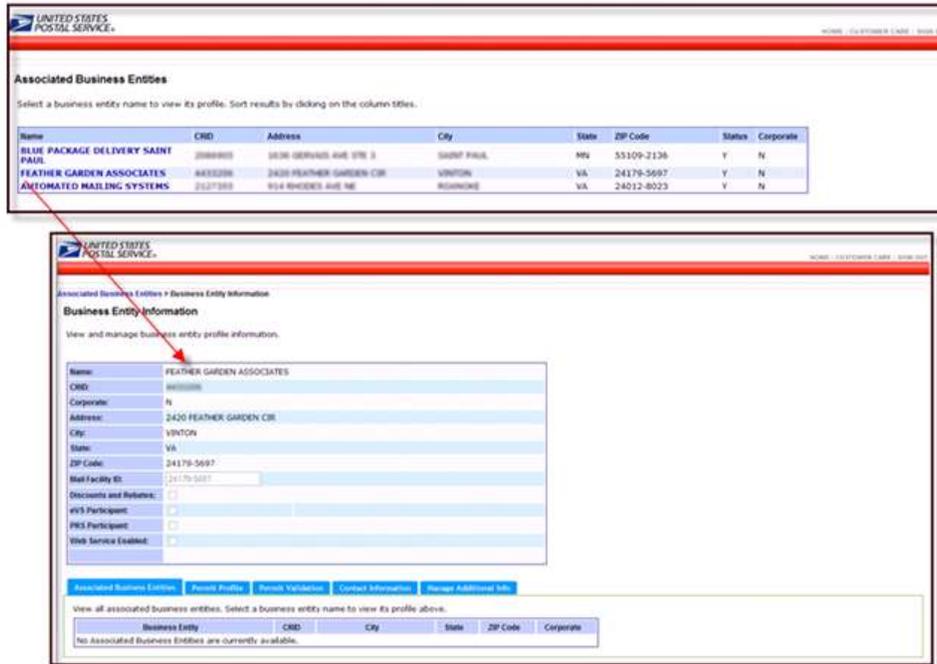


Figure 7-9: Managing permits

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

Mailers who submit Mail.dat 09-1, Mail.dat 11-1, or Mail.dat 11-2 files to the Postal Service do so using the downloadable *PostalOne!* Mail.dat Client.

Note: When using the *PostalOne!* Mail.dat Client, mailers must be logged in to the Business Customer Gateway and must then also click on one of the links that is associated to *PostalOne!* (i.e., Electronic Data Exchange, Mailing Reports, etc.) before logging into the *PostalOne!* Mail.dat Client. This will ensure that linkages to the location CRIDs and permits in *PostalOne!* are accessible to the *PostalOne!* Mail.dat client during server processing. The client is downloaded from the Electronic Data Exchange Page and designed to work while the user is logged into the Gateway.

Refer to the Postal Service Mail.dat Technical Specification, Chapter 3, for detailed installation instructions and user guidance.

- Notify the Help Desk by email to practice.** When the customer is ready to practice submitting Mail.dat files to the TEM, the customer initiates the practice process by sending the Help Desk a notification email and attaches the Full-Service Data Set-up Request Worksheets (available from RIBBS at http://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/xmlspec/xmlforms/xmlforms.htm.) The worksheets are designed to ensure that identification data is set up correctly and will prepare the Help Desk with verifying that the MIDs are all inclusive and the location associated to the MIDs are accurate (List of Mailer IDs Worksheet). This is for the purposes of USPS administrative purposes and does not restrict the use of Mailer IDs. For CRIDs use the "List of CRIDs Worksheet" to ensure that all MIDs are associated to the correct CRID and CRID location.
- Begin practice runs.** The customer uses the test scenarios that closely reflect their intended production plans when submitting Mail.dat files during practice.

- ⑤ **Notify the Help Desk by email to validate scenarios.** The customer initiates the test validation process by sending the Help Desk notification of readiness to begin meeting the test criteria. The Help Desk responds, assists mailers with the test scenario criteria, and provide technical assistance if necessary.
- ⑥ **Complete the TEM process.** The customer completes the required scenarios for each mail class by executing the test scenarios and meeting the criteria. The Help Desk will monitor that the test criteria are being met and completed.
- ⑦ **Wait for authorization.** Once the customer has successfully completed their Mail.dat file testing in the TEM, the Help Desk will notify the Business Mail Entry unit or Business Mail Support that the Mailer has completed the file testing and is ready to move to the Production environment.

7.4 Parallel Testing

For mailers with a Special Postage Payment System, there is a parallel test process. These mailers will receive Business Mail Support (BMS) Authorization. The BMS will assess the requirement for parallel test for mailers who have not participated in eDoc previously.

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

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

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

8. Mailer ID System

8.1 Overview

A Mailer ID (MID) is required in all Intelligent Mail. The MID is a field within the Intelligent Mail barcode that is used to identify Mail Owners and/or Mailing Agents or other service providers on the mailpiece. Both the Mail Owner and Mail Preparer are required to be identified for all full-service mailings in eDoc.

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

The Mailer ID System allows Mail Owners and Mail Preparers / Mailing Agents to request MIDs for their own use. Mail preparers, mailing agents or other service providers can request and query for MIDs on behalf of Mail Owners or business entities using Mail.XML USPSMIDCreateRequest message. Mailers are required to provide the information for all of the required blocks including legal liability acknowledgement. Refer to the Postal Service Mail.XML Technical Specification for Profiles and Full-Service Feedback volume posted on RIBBS at https://ribbs.usps.gov/intelligentmail_schedule/releaseoverview2012.htm.

8.2 By/For Identification

By/For identification determines the data recipients for full-service feedback. Both the Mail Preparer (By) and Mail Owner (For) must be identified in full-service eDoc. If the Mail Owner is also the preparer and if no data distribution is desired, the Mail Owner Mailer ID (MID) can populate all the required fields in the eDoc and Intelligent Mail barcode (IMb), and will be used in full-service feedback. When the mail owner wishes to

delegate his/her Full-Service ACS data to a third party, full-service feedback uses the MID identification from the eDoc and the data recipient profile from the Mailer ID system.

In general, Full-Service ACS data is defaulted to the Mail Owner or delegate. Start-the-clock and container visibility data is available to the Mail Owner or delegate, and the Mail Preparer or delegate. If the intended data recipient (Mail Owner or Mail Preparer) prefers to retrieve data, the Mail Owner and Mail Preparer uses either the CRID, Permit Number or MID in the By/For eDoc for identification. If the intended data recipient wishes to delegate the data to a 3rd party, the MID in the By/For of the eDoc is used or if profile is set up, MID on the mail piece. Refer to A Guide to Intelligent Mail for Letters and Flats, section 1, posted on the RIBBS Web site at <http://ribbs.usps.gov/index.cfm?page=intellmailguides>

8.3 Mailer ID Issuance and Exceptions

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

8.3.1 Requesting Additional MID or Exceptions requires justification.

- Total mailing volume (per year)
- Number of mailing locations
- Total volume per mailing location (per year)
- Mailing cycles at locations (i.e. estimated total number of pieces within a 45 day period)

8.3.2 Exceptions for Mailer ID Application

Exceptions require hard-copy application process and Business Mail Entry Unit involvement. A Mailing Agent can request a MID on behalf of a Mail Owner through the hard-copy application process. If a mailing agent is acting on behalf of a mail owner, the mail owner and mailing agent must read, complete and sign section 3b of the Mailer ID Application which can be downloaded from the RIBBS Web site at <http://ribbs.usps.gov/index.cfm?page=intellmailmailidapp>.

The customer must forward the MID Application to the Business Mail Entry Unit (BMEU) or the Mailpiece Design Analyst (MDA) for volume validation. Mailers can contact their local BMEU or Mailpiece Design Analyst (MDA), by accessing:

<http://www.usps.com/nationalpremieraccounts/findlocators.htm> (Business Mail Entry locator) or <https://ribbs.usps.gov/mda/mda.cfm> (MDA Support Center).

The BMEU representative or MDA will verify that the Mailer ID Application is complete and validates the mailing volumes through the *PostalOne!* system, or other pertinent documentation provided by the applicant that demonstrates mailing volumes. The Mailer ID Application information is forwarded to the *PostalOne!* Help Desk who will issue the Mailer ID.

8.4 Mailer ID Request Dispositions

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

MID requests can be completely approved, partially approved or rejected by the MID system (e.g., partially approved or rejected as in a request for seven 6-digit MIDs, the approval is for five 6-digit MIDs, and two

MIDs' request are rejected). A MID request can be rejected because of conditions in violation of MID rules or limits. In such instances, a trigger for the Help Desk to get involved occurs.

8.5 Navigating the MID System

Once the user has gained access to the Mailer ID service through the Gateway, the user will have access to the MID system (this assumes that a BSA has been designated for this service or the BSA had previously approved access for the user). The system may be accessed from the Design & Prepare section of the Gateway homepage after a user signs in (Figure 8-1).

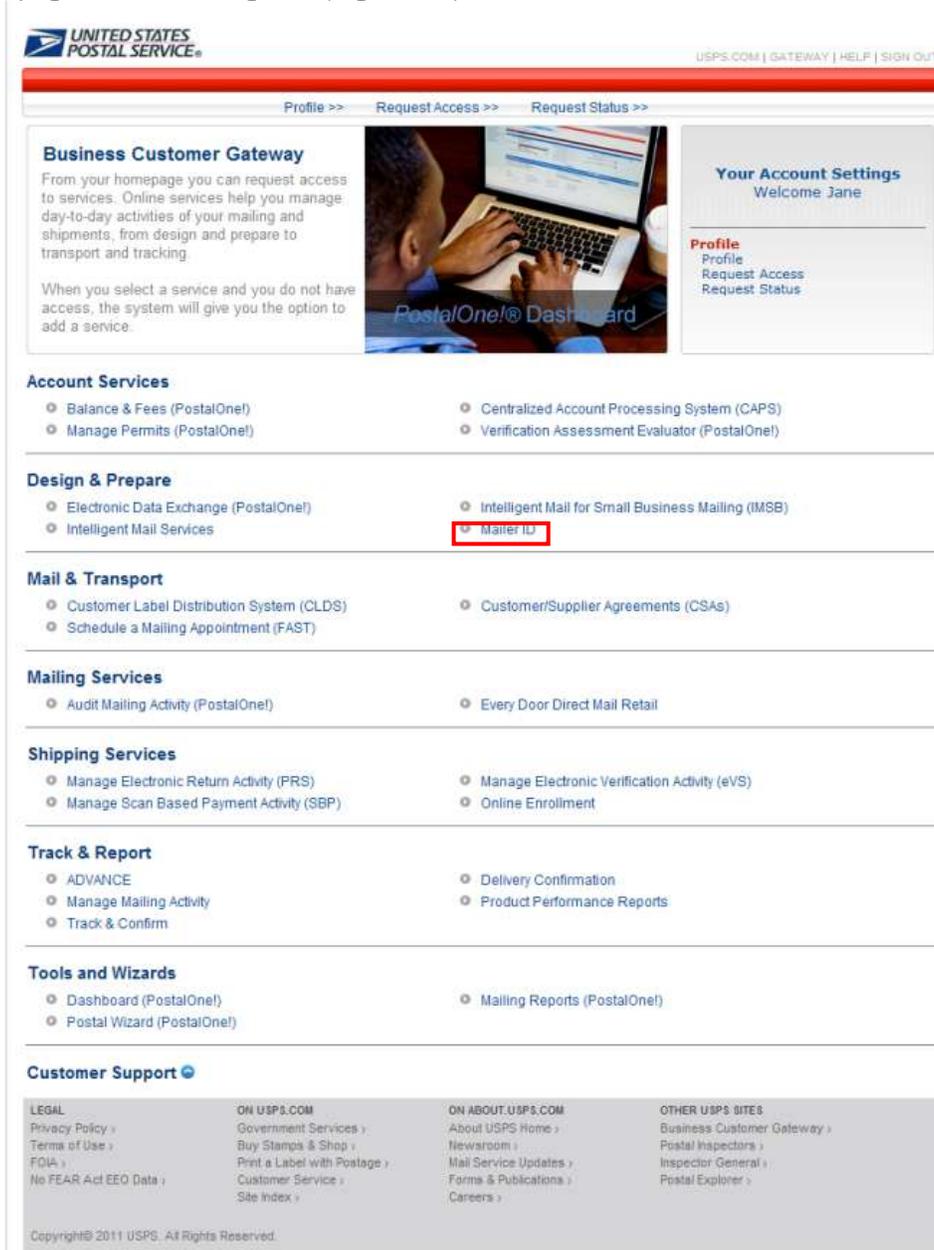


Figure 8-1: User accesses the Mailer ID System from Gateway homepage

The Welcome to the Mailer ID System page is the MID system landing page (Figure 8-2). This screen appears after the user selects the Mailer ID link from the homepage. In this screen, the (signed-in) user currently has one MID associated with its CRID. A user with no MIDs assigned will see a MID Summary

indicating no Mailer IDs are associated to its CRID. The screens that follow demonstrate the general flow of a new user accessing the Mailer ID system.

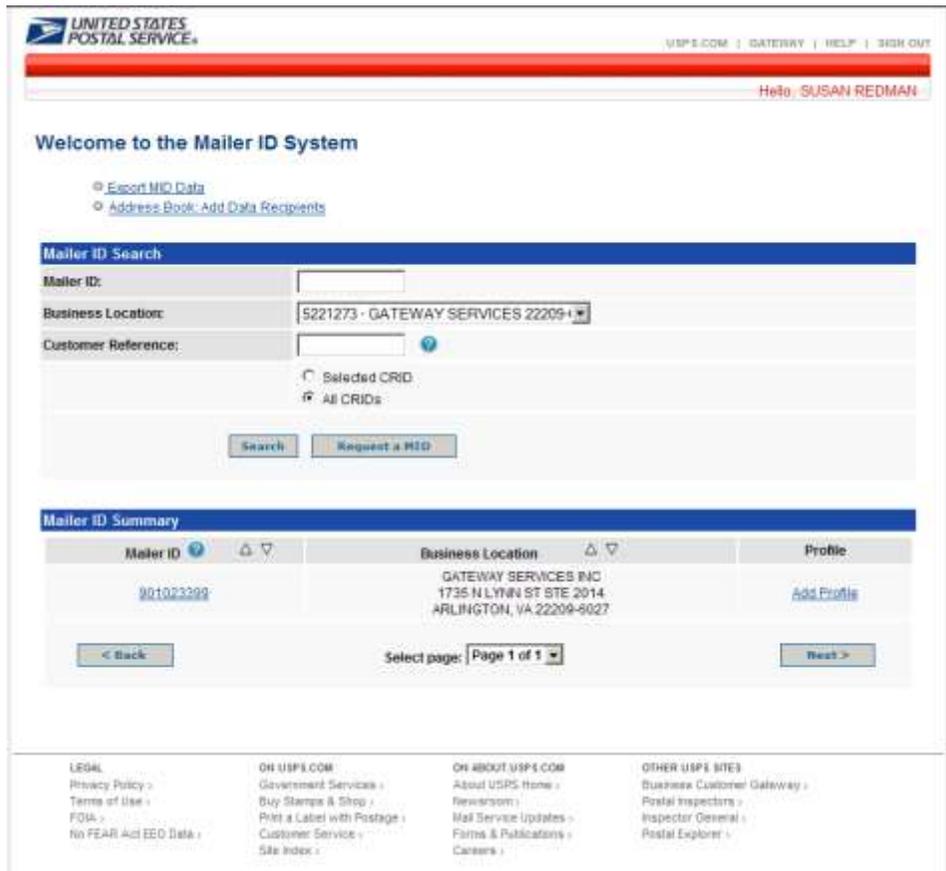


Figure 8-2: Welcome to the Mailer ID System page

The Welcome to the Mailer ID System

The Welcome to the Mailer ID System landing page has several features and is described in the following sections.

1. Apply for (Request) a MID
2. Export Mailer ID Data
3. Invoke the Address Book Add Data Recipients feature
4. Edit a Mailer ID (program association e.g., Full/ Basic Automation Service, OneCode Confirm)
5. Add or Edit a MID Profile (data distribution)
6. Invoke a Search by MID or CRID

8.6 Applying for a Mailer ID

The Apply for a MID screen appears when the user selects the Request A MID button from the Welcome to the Mailer ID System page (Figure 8-2). The user has the option to select a nine-digit numeric or a six-digit Mailer ID from the dropdown menu (Figure 8-3) and can request the number of MIDs available to the user. The system assigns MIDs based on the USPS established business rules, requiring mailers to meet certain volumes. For detailed information on the Mail ID volume requirements and such, refer to A Guide to Intelligent Mail for Letters and Flats, posted on RIBBS.

UNITED STATES POSTAL SERVICE®

USPS.COM | GATEWAY | HELP | Site Out

Hello, [Business Customers](#)

Insufficient Volume for 6 digit MID.

Apply For a Mailer ID

Select the type of MID you would like to request: 6 digit or 9 digit. You may apply for a maximum of 10 MIDs per site in one request. Please revisit this page if you would like to apply for more than 10 MIDs. Use the drop down menu to select either a 6 digit MID or a 9 digit MID.

Please fill in the following information

MID Type / Company Name / Quantity	6 Digit - GATEWAY SERVICES INC - 0 Available 6 Digit - GATEWAY SERVICES INC - 0 Available 9 Digit - GATEWAY SERVICES INC - 1 Available
Number of MIDs Requested	

LEGAL: Privacy Policy >, Terms of Use >, FOIA >, for PEAR Act EEO Data >

ON USPS.COM: Government Services >, Buy Stamps & Shop >, Print a Label with Postage >, Customer Service >, Site Index >

ON ABOUT USPS.COM: About USPS Home >, Newsroom >, Mail Service Updates >, Forms & Publications >, Careers >

OTHER USPS SITES: Business Customer Gateway >, Postal Inspectors >, Inspector General >, Postal Explorer >

Figure 8-3: Applying for a MID

8.6.1 Volume rules for MIDs

9 digit Mailer ID

- **1st MID can be obtained without (Mailer) volume verified**
- **2nd MID and additional MIDs require 1 million pieces with volume verified per MID request**

6 digit Mailer ID

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

8.6.2 Quantity Rules for MIDs through the Mailer ID System

9 digit Mailer ID

- **ten (10)**

6 digit Mailer ID

- **five (5)**

8.6.3 Assigning MIDs

The MID system logic in assigning MIDs are a function of the MID issuance rules. ¹

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

¹ See also Section 8.3.2 above, Exceptions for Mailer ID Application

8.6.4 Mailer ID Requests

Mailer ID requests can be for any of the following:

- *request a 6 digit Mailer ID*
- *request a 9 digit Mailer ID*
- *request the number of MIDs*

8.6.5 Mailer ID Use

Mailer ID can be used for any of the following programs (refer to Figure 8-4):

Mailer IDs can be used for Confirm, Full/Basic Service, Full-Service ACS, OneCode ACS, OneCode ACS with Confirm, and Traditional ACS. Note: The Full-Service ACS option requires selecting both the checkboxes for Full/Basic Service and Full-Service ACS. If entering unassociated ACS billing information, only the Full/Basic Service checkbox needs to be selected.

Mailer IDs for Package Product Programs can be used for Confirmation Services for Package Products and Extra Services or for the Electronic Verification System (eVS)

The ACS Program Options screen appears after selecting the program options via Request MIDs from the Apply for a Mailer ID screen (Figure 8-3). This screen displays the MID(s) that the system created. When the user receives a new MID, the MID Summary page displays with instructions on how to proceed with using Mailer IDs for which the MID has been associated. The user's new MID assignment(s) is shown at the top of the Summary page along with the program(s) that were selected to associate with it. The user can continue requesting additional MIDs or return to the MID Summary (landing) page.

UNITED STATES POSTAL SERVICE®

USPS.COM | GATEWAY | HELP | SIGN OUT

Hello, SUPERDOWN

Mailer ID Program Option Details

Apply For a Mailer ID

Select whether you wish to assign a specific Mailer ID number or have the system assign it, and indicate which programs will be used with this Mailer ID (at least one must be selected).

Mailer ID Request # 1

Automatically generate this Mailer ID.

Please try to assign the Mailer ID I have requested below.

Add a Customer Reference

Check the boxes for the program options you are selecting. Note: If you select one of these options you can not select a Package Product program option for this Mailer ID.

CONFIRM
(i.e. Delivery Confirmation, Signature Confirmation, Certified Mail, Express Mail, Priority Mail Open and Distribute)

Full / Basic Service

Full Service ACS
(Must select Full / Basic Service to receive Full Service ACS)

One Code ACS
(Submit Form 3573 to acs@usps.gov)

One Code ACS with CONFIRM
(Submit Form 3573 to acs@usps.gov)

Traditional ACS
Submit Form 3572 to acs@usps.gov. Traditional ACS is not available in conjunction with OneCode or Full Service ACS.

Check the box for the Package Product Program option you are selecting. Only one program option can be selected. Note: If you select one of these options you can not select a program option from above for this Mailer ID. For either Package Products option, submit the PS Form 5051 to dconfirm@usps.gov or fax to 901-821-6244.

Confirmation Services for Package Service Products and Extra Services
(i.e. Delivery Confirmation, Signature Confirmation, Certified Mail, Express Mail, Priority Mail Open and Distribute)

Electronic Verification System (eVS) for Package Products

[Request Mid](#) [Return](#)

LEGAL
[Privacy Policy >](#)
[Terms of Use >](#)
[FOIA >](#)
[No FEAR Act EEO Data >](#)

ON USPS.COM
[Government Services >](#)
[Buy Stamps & Shop >](#)
[Print a Label with Postage >](#)
[Customer Service >](#)
[Site Index >](#)

ON ABOUT.USPS.COM
[About USPS Home >](#)
[Newroom >](#)
[Mail Service Updates >](#)
[Forms & Publications >](#)
[Careers >](#)

OTHER USPS SITES
[Business Customer Gateway >](#)
[Postal Inspectors >](#)
[Inspector General >](#)
[Postal Explorer >](#)

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Figure 8-4: Mailer ID Program Option Details

Mailer ID Profile

The Welcome to the Mailer ID screen (Figure 8-2), a user has the ability to edit a MID Program option by selecting the MID hyperlink-enabled number under the Mailer ID section. If the user selects the MID number, the system displays the Mail ID Program Options Details page (Figure 8-5). The user has the option to add or remove a Program using the *Update* button. The user can create a custom name to identify a Mailer ID by using the Alias field. The Alias has a limit of 38 characters. A confirmation screen will be displayed after the user edits any MID Program Options.

The user can no longer delete a MID from his profile. To delete a Mailer ID, the mailer should call the Help Desk.

If a user selects the *Return* button, the system redirects the user to the MID Summary (landing) screen (Figure 8-2) without making updates or changes.

Program Options

The following Mailer IDs have been issued in response to your request. Click on selected Mailer ID to change options.

[Request More MIDs](#) [Return To Summary](#)

New Mailer ID	
Mailer ID:	901077919
Program(s) selected:	Full / Basic Service
Customer Reference (alias) :	

- CONFIRM**
 Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID you must contact the CONFIRM support desk to complete your account profile, by calling 1-800-238-3150, option #1.
- Confirmation Services for Package Service Products and Extra Services**
 Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID, you must complete the Certification Process for Confirmation Services. The National Customer Support Center (NCSC) provides technical support for the certification process, should you have any questions regarding the process you may call a member of the Confirmation Service Certification Customer Support Team at (877) 254-9693 (Option 1). Please go to <http://mbbs.usps.gov/index.cfm?page=barcodecert> to obtain the Confirmation Services Certification Test Instructions to help you begin mailing with Confirmation Services as quickly as possible.
- Electronic Verification System (eVS) for Package Products**
 Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID, you must complete the eVS Certification Process. The National Customer Support Center (NCSC) provides technical support for the certification process, should you have any questions regarding the process you may call a member of the eVS Customer Support Team at (877) 254-9693 (Option 1) or email at eVS@usps.gov. Please go to http://mbbs.usps.gov/evs/documents/tech_guides/ to obtain the eVS Certification Test Instructions.
- Full / Basic Service**
 Thank you for applying for your new USPS Mailer ID (MID). You are now able to use your new MID for letters, flats and cards utilizing Full Service or Basic Service options. If you are selecting to use Full Service, please contact the ACS department at 1-877-640-0724 option #1.
- One Code ACS**
 Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID you must contact the One Code ACS support desk to complete your account profile, by calling 1-877-640-0724 option #1.
- One Code ACS with CONFIRM**
 Thank you for applying for your new USPS Mailer ID (MID). Before you begin using your new MID you must contact the One Code ACS support desk, by calling 1-877-640-0724 option #1, and the CONFIRM support desk, by calling 1-800-238-3150, option #1, to complete your account profiles.

[Request More MIDs](#) [Return To Summary](#)

LEGAL Privacy Policy Terms of Use FOIA No FEAR Act EEO Data	ON USPS.COM Government Services Buy Stamps & Shop Print a Label with Postage Customer Service Site Index	ON ABOUT USPS.COM About USPS Home Newsroom Mail Service Updates Forms & Publications Careers	OTHER USPS SITES Business Customer Gateway Postal Inspectors Inspector General Postal Explorer
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Figure 8-5: Mailer ID Details page (edit mode) – successful update confirmation

The MID: A Few Things to Think About as a Mail Owner	
Full-Service ACS is governed by the By/For identification fields within the eDoc	Simple Rule 1: Mail Owner must be identified in eDoc by one of: <ul style="list-style-type: none"> • Mailer ID (MID) • Customer Registration ID (CRID) • Permit.
Mail Owner and the Mail Preparer are responsible for controlling access to data and information	Simple Rule 2: A delegated party who is to receive feedback must be associated to the mail owner CRID to where the feedback data is normally

about their mailings	distributed. The Permit and/or MID must also be associated to the mail owner CRID in order to distribute data.
A third party other than mail owner/preparer can receive Mail Owner Full-Service ACS	Simple Rule 3: A party other than mail owner/preparer to whom feedback is to be diverted, must be affiliated via a data recipient profile, which is setup by the Mail Owner in the Mailer ID System.
To access online reports, a user must be associated to the company CRID that by default receives the feedback data	Simple Rule 4: CRID that receives the feedback data is the CRID that is identified in the mailer owner field of the eDoc and who must take action to divert data to the user.

Table 5: Mailer Owner Considerations

8.7.1 Mailer ID Recipient Profile

The Mailer ID Recipient Profile tool is used for data distribution by creating profiles for recipients of the data. Currently, Full-Service ACS, Nixie, IMb Tracing, and full-service start-the-clock / container visibility, tray visibility, and bundle visibility scan data can be distributed to a third-party.

A user must first create a Mailer ID Data Recipient Profile for the full-service mailings by selecting the **Add Profile** (from the Welcome to the Mailer ID System page) or **Remove MID Profile** (from the Mailer ID Data Recipient profile). If the user selects the *Edit Profile* hyperlink under the Data Profile section from the MID Summary screen (Figure 8-6), the system displays the Mailer ID Data Recipient Profile page (**Error! Reference source not found.**). This page is long and requires the user to use the scroll bar. **Error! Reference source not found., Error! Reference source not found., and Error! Reference source not found.** show the two sections of the MID Profile page.

The Mailer ID Summary Overview (refer to Figure 8-6)

- 1 **Request a Mailer ID.** Takes the user to the Apply for Mailer ID page. User applies for a MID from this *Request for a MID* button. See the section above on Applying for a Mailer ID.
- 2 **Export MID Data.** Allows the mailer to export MID data for a selected CRID. See section 8.8.
- 3 **Address Book.** Takes the user to the Address Book feature. User starts the data recipient creation from this link. See section 8.9 on Mailer ID Address Book.
- 4 **MID Search.** Allows the user to enter a MID for which to search. MIDs that match the search criteria are displayed as links when the searching user is the MID Owner. The link will take the user to the Mailer ID Details edit page.
- 5 **Customer Reference Search.** Allows the user to search for MIDS based on the Customer Reference field for all CRIDs registered under a mailer's Business Customer Gateway profile.
- 6 **Affiliate Dropdown Menu.** Allows the user to select a company for which to view a MID(s). The list of companies is derived from the user's CRID profile as captured/identified by the Gateway customer registration system. All company CRIDs associated to the user which has a MID privilege or role is listed.
- 7 **Mailer ID Affiliate** (per Search Results). Any MIDs matching the search criteria are (results) displayed as links when the searching user is the owner of the MID (or if the searching user is the delegate of the MID). If the MID has been delegated, the user performing the search will not see a link. If the user selects the MID hyperlink, the Mailer ID Detail page appears.
- 8 **Mailer ID Affiliate (delegated)** (per Search Results). Any MIDs matching the search criteria are displayed. If the MID is delegated, the link is disabled.
- 9 Add Profile or Edit Profile.

Add Profile allows the user to create a MID profile. When a profile does not exist for the MID, the user can select the link and be taken to the Mailer ID Data Recipient Profile page, top section, where the user can set-up a MID profile.

Edit Profile allows the user to edit a previously established profile. When a profile exists for the MID, the user can make changes to a previously established profile to determine the recipients for data e.g., Full-Service ACS, Confirm and Start-the-Clock (Figure 8-8, Figure 8-9, and Figure 8-10).

10 Add/Edit ACS Billing. Allows the user to add and manage a billing profile for unassociated Full-Service ACS records fulfilled. See Section 8.10 for information.

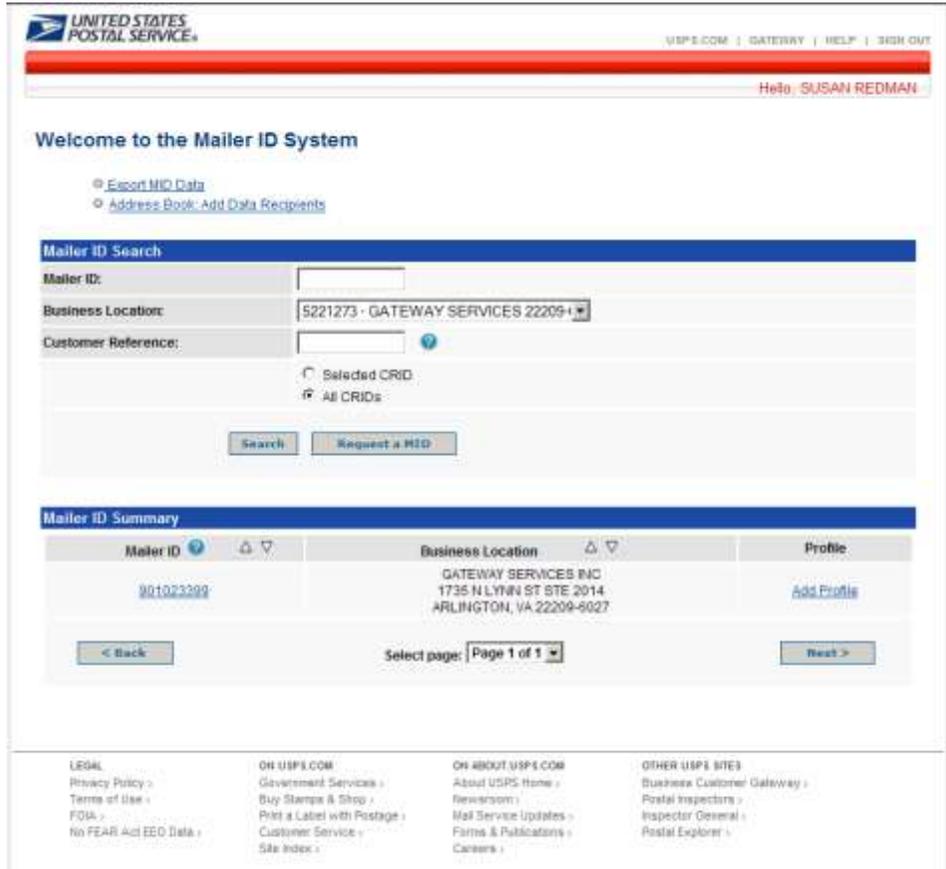


Figure 8-6: Mailer ID Summary page

8.7.2 Mailer ID Delegation

In the Mailer ID Data Recipient Profile, top section of screen, the user can elect to delegate a MID. If the user elects to delegate a MID to an affiliate (selects from Delegate dropdown and checks the Delegate checkbox) the remaining portion of the screen becomes disabled as it (MID) can then only be updated by the selected delegate. The dropdown options are entries from the user's Address Book associated with the business location identified.

Note: This option DOES NOT create any data distribution profile. This option only gives maintenance of a MID to a third party. The third party with control of the MID can now manage data distribution profiles and send the data on behalf of the owner of actual MID to self or another party. Refer to the Address Book section below.

Figure 8-7 Mailer ID Data Recipient Profile

The Mailer ID Data Recipient Profile - Delegation Overview

- 1 **Mailer ID.** The Mailer ID for which the profile will be set-up.
- 2 **Site Address.** The business entity name and address for which the MID was created and as captured during the gateway account set-up.
- 3 **Delegate Checkbox.** Allows the user to delegate the (displayed) MID by selecting the checkbox. An entire MID is delegated, not individual data types. Selecting the checkbox disables all fields in the data recipient sections.
- 4 **Delegate Dropdown Menu.** Allows the user to select entries from their Address Book.
- 5 **Remove Profile Button.** Allows user to disable delegation if it was previously established so that control of data distribution returns to the user.

8.7.3 Mailer ID Data Distribution

Independent sections are displayed for each data type (e.g., Full-Service ACS, Confirm, and full-service Start-The-Clock / container visibility). How to associate the MID to a data recipient is described in the section below. Note that Mailer ID profile updates must be completed in the Mailer ID System 24 hours before the eDoc for the mailing is submitted to receive the correct data distribution. There are four options (Figure 8-9). Data for most of the above services can be provided to the mail owner or someone they designate and it may also be provided to the mail preparer or someone they designate; however it cannot be provided to both the primary and their designate.

Data Type	Owner or Designate	and/or	Preparer or Designate
Start of Clock	Owner or Owner Designate	and/or	Preparer or Preparer Designate
Container Visibility	Owner or	and/or	Preparer or

	Owner Designate		Preparer Designate
Tray Visibility	Owner or Owner Designate	and/or	Preparer or Preparer Designate
Bundle Visibility	Owner or Owner Designate	and/or	Preparer or Preparer Designate
IMb Tracing	<ul style="list-style-type: none"> • To sign up for IMb Tracing, please contact the IMb Tracing helpdesk at IMbTracing@USPS.GOV or 1-800-238-3150. • IMb Tracing data is provisioned based on the MID on the mailpiece. It is not provisioned based on the mail owner or mail preparer that is indicated within your electronic documentation. • When you fill out your IMb Tracing application form, you can indicate who should receive your IMb Tracing data. Some mailers choose to receive the data themselves and others choose to provision it to their Mail Service Provider. • By default, IMb Tracing data can only be sent to one IMb Tracing account. However, if you would like more than one IMb Tracing account to receive a copy of the data, you can create an Exception Broker through the MID system on the Business Customer Gateway. 		
Change of Address	Owner or Owner Designate	and/or	Preparer or Preparer Designate
Note	Owner or Owner Designate	and/or	Preparer or Preparer Designate
eDoc Data Quality Report	Owner or Owner Designate	and/or	Preparer or Preparer Designate

Table 6 Delegation of Data by Mail Owners and Mail Preparers

8.7.3.1 Data Recipient Options

Note: Radio buttons allow only one option to be selected at any one time.

Do not create a profile for this data. Selecting this radio button causes no data distribution profile to be set-up. This is the default setting when a MID is created. The Mail Owner identified in the eDoc receives Full-Service ACS and Confirm data, the Mail Owner and Mail Preparer receive Full-Service Start-the-Clock and Container Visibility data. In the event that a user previously selected a different data distribution option and wishes to revert back to the default setting, the user can select this option.

Send this data to the preparer of the mail. A Mail Owner may authorize a Mail Preparer to receive the data associated with all mailings that specific Mail Preparer creates. For this option the user is required to identify the Mail Preparer from their Address Book. The user may select only one Mail Preparer.

Send data to the holder of the MID on the mailing. When this option is active (the Mail Owner MID is used to identify the Mail Owner in the eDoc), the system will route data to the Mailer ID on the mailpiece. When selecting this option, a user identifies a data recipient from an Address Book entry that is not the Preparer or Mailer ID holder on the mailpiece to receive data. This option only applies to the ACS and IMb Tracing data.

Always use the business information below to route my data. When this option is active it acts as an exception broker to send your data to a third party identified through the MID.

Profile	Description
Static Relationship	Mail owner or preparer has given control to a third party or preparer to manage and distribute data. This MID delegation does not delegate data to any third party rather allows third party to manage the data distribution profiles.
	Mail owner always distributes data to the party identified for a specific Mailer ID. Applies to ACS and IMb Tracing data.
	Mail owner data is distributed to mail preparer for pieces prepared by the mail preparer.
	Data is distributed to a designated third party (identified by the MID)by the Mail Preparer or Mail Owner (When Mail Owner and/or Mail Preparer identify themselves with a specific MID in the eDocs)

Table 7 Data Recipient Options

The ACS data can be sent by the Mail Owner to the Preparer of the mail piece; to the entity whose MID is on the physical piece's IMb; entity identified by their MID as a third party to always receive the data belonging to the Mail Owner.

FULL-SERVICE ACS

Select an existing data recipient from your previously selected recipients or add a new recipient.

- Do not create a profile for this data.
- Send this data to the preparer of the mailing.
Allow the following recipient to receive my data based on information contained in electronic file submissions.
Recipient:
- Send this data to the holder of the MID on the mailing.
(The MID on the piece receives the data and the MID creating the profile must be the owner of the piece).
- Always use the business information below to route my data.
Recipient:

Figure 8-8 Full Service ACS data distribution to recipient

The Tray Visibility data can be sent to the preparer of the trays by the mail owner; or the Mail Owner or preparer can send this data to a designated third party.

TRAY VISIBILITY

Select an existing data recipient from your previously selected recipients or add a new recipient.

- Do not create a profile for this data.
- Send this data to the preparer of the mailing.
Allow the following recipient to receive my data based on information contained in electronic file submissions.
Recipient:
- Always use the business information below to route my data.
Recipient:

Figure 8-9 Tray Visibility Data Distribution to Recipient

The Bundle Visibility data (Top piece scans of a bundle) can be sent to the preparer of the bundle by the mail owner; or the Mail Owner or preparer can send this data to a designated third party.

BUNDLE VISIBILITY

Select an existing data recipient from your previously selected recipients or add a new recipient.

Do not create a profile for this data.

Send this data to the preparer of the mailing.

Allow the following recipient to receive my data based on information contained in electronic file submissions.

Recipient:

Always use the business information below to route my data.

Recipient:

The IMb Tracing data always goes to the subscriber whose MID is on the Physical mailpiece IMb. However the Owner of the piece can designate a third party to receive the IMb Tracing data besides the subscriber of the MID on the physical piece.

Figure 8-10 Bundle Visibility Data Distribution to Recipient

IMb Tracing

IMb Tracing is a free service that provides automation scan data for your letters, flats, and bundles. To sign up for IMb Tracing and configure your data subscription, please contact the IMb Tracing helpdesk at IMbTracing@USPS.GOV or 1-800-238-3150.

IMb Tracing data is provisioned based on the MID on the mailpiece. It is not provisioned based on the mail owner or mail preparer that is indicated within your electronic documentation. When you fill out your IMb Tracing application form, you can indicate who should receive your IMb Tracing data. Some mailers choose to receive the data themselves and others choose to provision it to their Mail Service Provider. Work with the IMb Tracing Helpdesk to complete your IMb Tracing application form and configure your data subscription.

By default, IMb Tracing data can only be sent to one IMb Tracing account. If you would like more than one IMb Tracing account to receive a copy of the data, you can add an exception below, which will create a duplicated copy of the IMb Tracing scan events for this MID, which can be provided to a designated MID in the data distribution profile. (Please note that in most instances, mailers do not need to duplicate scan event data. Either the mailer or their designee can subscribe to receive IMb Tracing scan information; this exception is only needed if both the mailer and their designee need to receive the same scan information.) The third party designee MID owner will need to sign up for IMb Tracing and configure their data subscription through the same process described above. They should contact the IMb Tracing helpdesk at IMbTracing@USPS.gov or 1-800-238-3150.

Radio Button 1 Do Not duplicate scan events (Most Common)

Radio Button 2 Duplicate scan event for third party MID.

Figure 8-11 IMb Tracing Data Distribution to Recipient

The Start-The-Clock and Container Visibility data can be sent to the preparer of the containers by the mail owner; or the Mail Owner or preparer can send this data to a designated third party.

FULL-SERVICE START THE CLOCK/CONTAINER VISIBILITY

Select an existing data recipient from your previously selected recipients or add a new recipient.

Do not create a profile for this data.

Send this data to the preparer of the mailing.

Always use the business information below to route my data.

Recipient:

Figure 8-12 Start-the-Clock Data Distribution to Recipient

Data for most of the above services can be provided to the mail owner or someone they designate and it may also be provided to the mail preparer or someone they designate; however it cannot be provided to both the primary and their designate. Table 8 is a tabular representation of this policy. A checkmark in a column means that data can be provided to that entity; an "X" in the column means the data cannot be provided.

Data Type	Owner or Designate	and/or	Preparer or Designate
Start of Clock	Owner or Owner Designate	and/or	Preparer or Preparer Designate
Container Visibility	Owner or Owner Designate	and/o	Preparer or Preparer Designate
Tray Visibility	Owner or Owner Designate	and/o	Preparer or Preparer Designate
Bundle Visibility	Owner or Owner Designate	and/o	Preparer or Preparer Designate
IMb Tracing	<ul style="list-style-type: none"> • To sign up for IMb Tracing, please contact the IMb Tracing helpdesk at IMbTracing@USPS.GOV or 1-800-238-3150. • IMb Tracing data is provisioned based on the MID on the mailpiece. It is not provisioned based on the mail owner or mail preparer that is indicated within your electronic documentation. • When you fill out your IMb Tracing application form, you can indicate who should receive your IMb Tracing data. Some mailers choose to receive the data themselves and others choose to provision it to their Mail Service Provider. • By default, IMb Tracing data can only be sent to one IMb Tracing account. However, if you would like more than one IMb Tracing account to receive a copy of the data, you can create an Exception Broker through the MID system on the Business Customer Gateway. 		
Change of Address	Owner or Owner Designate	and/o	Preparer or Preparer Designate
Note	Owner or Owner Designate	and/o	Preparer or Preparer Designate
eDoc Data Quality Report	Owner or Owner Designate	and/o	Preparer or Preparer Designate

Table 8 Delegation of Data by Mail Owners and Mail Preparers

8.8 Mailer ID Data Export

Mailers have the capability to export MID data for a selected CRID to either an Excel (XLS) or a Comma Separated Value (CSV) file format. The user selects the *Export MID Data* link from the Welcome to the Mailer ID System page. Refer to Figure 8-2.

The MID system will export the following fields:

- CRID
- MID
- Company Name
- Address Line 1
- Address Line 2
- ZIP/Postal Code
- State
- Phone
- E-mail
- Pax
- Registered service for each MID

- Total MIDs
- Number of 9-digit MIDs
- Number of 6-digit MIDs

8.9 Mailer ID Address Book

The Address Book screen appears when the user selects the *Address Book* link from the Welcome to the Mailer ID System page. The Address Book feature allows a user to maintain a list of Mailer ID data recipients. Refer to Figure 8-14.

A user has the option to enter a MID and the system will display a pop-up, Figure 8-14, to verify the recipient to be added. At this point, the user can add the entry to the Address Book by clicking the *Continue* button or by clicking the *Cancel* button.

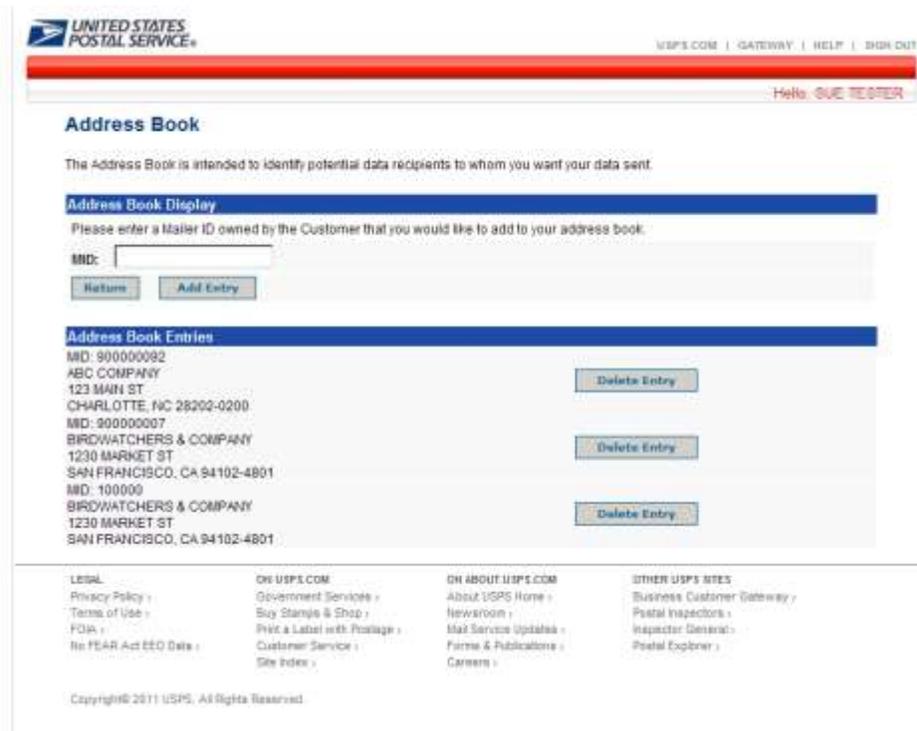


Figure 8-13: Address Book

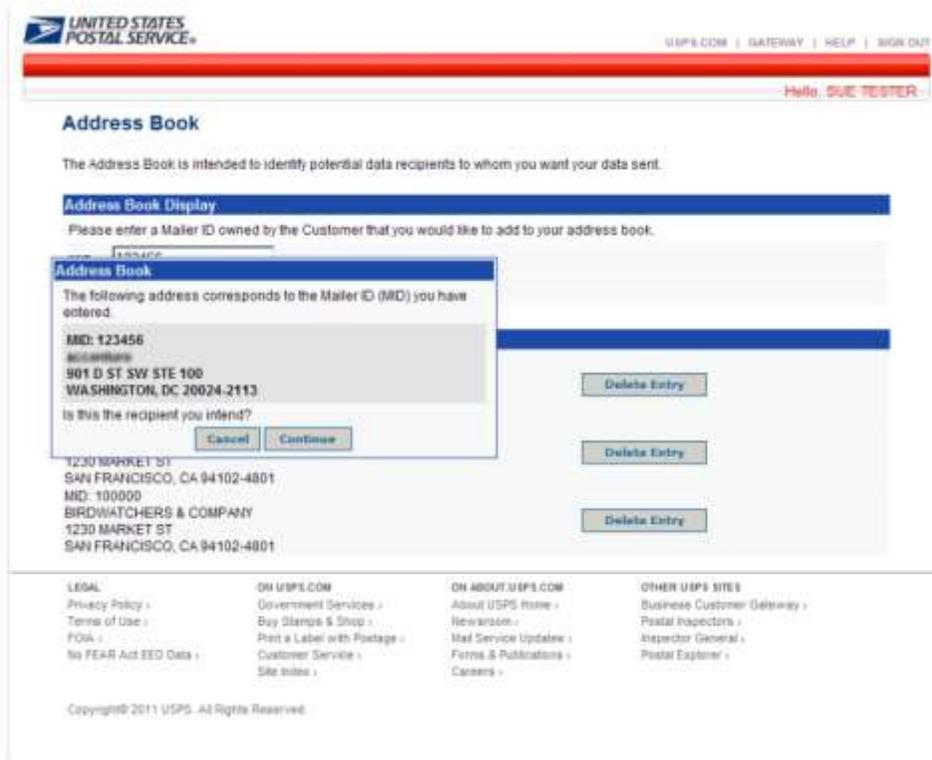


Figure 8-14: Entering a MID in Address Book

8.10 Full-Service ACS Billing Option

To fulfill non full-service mailpiece ACS with a full-service Service Type Identifier (STID) that cannot be matched to eDoc, the MID system will add a Full-Service ACS Billing profile for unassociated ACS records. This functionality enables mailers to optionally request that invoicing be directed to a specified "Bill to" address for unassociated records. This option is only available to mailers who select the basic/full-service program option. The MID system will have an "Unassociated Full-Service ACS Billing" page which will allow a mailer to input billing information that will be sent to the National Customer Support Center, ACS Department to enable fulfillment and billing. Refer to Figure 8-15: Full-Service ACS Profile Data Entry Screen.

Full-Service ACS Unassociated Billing Profile

Invoices will be mailed to the Customer Registration ID (CRID) that is associated with the Mailer ID used in the Intelligent Mail barcode (IMb) on the mail piece for Address Correction Service (ACS) records which were generated and fulfilled, but could not be associated to electronic documentation.

Specify an alternative billing address by providing all information marked by an asterisk. You may also submit an address not associated with a Mailer ID in your profile.

Delegate the management of this Mailer ID ACS Billing Profile to the business listed below. Delegation enables the Mailer ID ACS Billing Profile for this Mailer ID to match that of the business listed below.

Delegatee

Billing Address	
MID:	200087
CRID:	4432002
Attention Line:	<input type="text"/>
*Name/Company Name:	<input type="text"/>
*Country:	<input type="text" value="UNITED STATES"/>
*Address Line 1:	<input type="text"/>
Address Line 2:	<input type="text"/>
Address Line 3:	<input type="text"/>
*City:	<input type="text"/>
*State:	<input type="text" value="SELECT"/>
*Zip:	<input type="text"/>
Zip-Four:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
Email:	<input type="text"/>
<input type="button" value="Save Profile"/> <input type="button" value="Remove Profile"/> <input type="button" value="Reset"/> <input type="button" value="Return"/>	

Figure 8-15: Full-Service ACS Profile Data Entry Screen

9. Appendix A: Test Criteria for the TEM Sample

The following is an extract for First-Class mail from the eDoc and Full-Service Authorization Guide which is available on RIBBS®. Refer to this checklist for an up-to-date list for all mail classes.

First-Class Mail Test Scenarios

At a minimum complete FC1A or FC1B, FC2A or FC2B, FC3 and FC4A or FC4B. If you are testing for full-service complete FC1A or FC1B, FC2A or FC2B, FC3, FC4A or FC4B and FC5.

Scenarios FC1A and B: Submit a Mail.dat file.

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

- Qualification Report including Container Information (.csm Container status is 'blank' for an original file)
- Version Summary Report

Then submit a 'ready to pay' Mail.dat file that contains the information necessary to generate the following documents:

- PS Form 3600 – Postage Statement – First-Class Mail (.csm Container status is 'R' for ready-to-pay)
- Reconciliation Report

Or

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

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

Scenarios FC2A and B: Submit a Mail.dat file with more than one postage statement

Conditional: If the mailer intends to send to the production environment more than one postage statement (statements on more than one day) for a mailing (job), this scenario must be completed. If every mailing (job) produced by the Mailer will have only one postage statement then this scenario is not required. If not completing FC2, include the reason in the "Mail.dat Electronic Documentation Authorization Survey".

FC2A: Submit an 'original' Mail.dat file that contains the information necessary to generate the following documents:

- Qualification Report including Container Information (.csm Container status is 'blank' for an original file)
- Version Summary Report

Then submit a 'ready-to-pay' Mail.dat file that contains the information necessary to generate multiple (at least two) postage statements (.csm Container status is 'ready-to-pay') and the following documents:

- PS Form 3600 – Postage statement – First-Class Mail– Multiple postage statements (at least two statements with different mailing dates)
- Reconciliation Report

Or

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

- Qualification Report including Container Information
- PS Form 3600 – Postage Statement – First-Class Mail– Multiple postage statements (at least two statements with different mailing dates)

- Version Summary Report
- Reconciliation Report

Scenario FC3: Cancel a Postage Statement.

The Mailer must be able to Cancel a Postage Statement. Tip: Submit a Mail.dat file that cancels one of the postage statements from Scenarios FC1/FC2 or cancel one of the postage statements from Scenarios FC1/FC2 through the *PostalOne!* Graphic User Interface.

Scenario FC4A and B: Change a piece weight.

Conditional: If the Mailer only produces postage affixed (metered or precanceled stamp) mailings, this scenario is not required. Include the reason for not completing FC4 in the File Testing Scenario Worksheet that is emailed to the Help Desk.

FC4A: If the Mailer's software is not capable of changing piece weights, submit an 'original' Mail.dat file; then a 'ready to pay' Mail.dat file (Mailer may submit a 'ready to pay' file in first transmission) that generates a postage statement. Cancel the postage statement using the *PostalOne!* Graphic User Interface. Submit the same file as a new 'original' Mail.dat file with a new job number and a changed piece weight; then a 'ready to pay' Mail.dat file (Mailer may submit a 'ready to pay' file in first transmission) that generates a postage statement. Supply both job numbers in the File Testing Scenario Worksheet that is emailed to the Help Desk.

Or

FC4B: Submit an 'original' Mail.dat file; then a 'ready to pay' Mail.dat file (Mailer may submit a 'ready to pay' file in first transmission) that generates a postage statement. Cancel the postage statement. Submit an update file that changes the piece weight from the original statement and creates a replacement postage statement with the new piece weight. All transmissions are for the same Job ID and mailing group ID.

Scenario FC5: Submit a Mail.dat file that meets full-service criteria.

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

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

Scenario FC6: Submit a Mail.dat file that contains mixed mailings.

Mailings with full-service mailpieces combined with basic automation service mailpieces and/or POSTNET mailpieces in the automation portion. Include non-automation piece information if this type of mail is produced by the Mailer. If there is a Customer Supplier Agreement, include applicable information in file. Submit a Mail.dat file that contains the information necessary to generate the following:

- Qualification Report including Container Information
- PS Form 3600 – Postage Statement – First-Class Mail
- Version Summary Report
- Reconciliation Report
- Identify each piece as full-service, basic automation or POSTNET
- Piece level information in an IMR (Intelligent Mail Range Record) or PDR (Piece Detail Record) file
- Nesting information at the piece level, tray level and container level

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

Scenario FC7: Submit a Mail.dat file with mailings that have repositionable notes.

Submit a Mail.dat file that contains the information necessary to generate the following:

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

Scenario FC8: Submit a Mail.dat file that contains First-Class co-mailings.

Submit a Mail.dat file that contains the information necessary to generate the following documents:

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

Scenario FC9: Submit a Mail.dat file that contains First-Class co-palletization.

Trayed Letters – this scenario has mail presented and co-palletized at one post office

Submit one or more Mail.dat file(s) representing the original documentation and postage statement(s). [Do not use permit imprint accounts linked to the Centralized Account Processing System (CAPS).] Send the job number(s) to the Help Desk using the File Testing Scenario Worksheet. This file(s) will generate the following documents:

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

The postage statement(s) will be finalized by the TEM team. The Mailer will then send in the Mail.dat file for the co-palletized mailing. This file will generate the following document: Original Container Information (OCI) Report.

10. Appendix B: Access to Online Postage Statements

Mailers can view and retrieve postage statements online. Refer to this quick reference, step-by-step set of instructions to access hard copy postage statements. For detailed instructions for each step, refer to the citation noted in parenthesis.

The sections and figures in parenthesis below are hyperlinked. Place your mouse (or cursor) over the section number or figure then select the Ctrl key plus click the mouse to take you to the actual section within this document.

1 Access the Business Customer Gateway (Section 2.1)

- Existing users log on using Gateway username and password (Section 2.2)
- New users (Section 2.1):
 - From the usps.com home page, click the hotlink for the [Business Customer Gateway](#) found on the lower right hand corner of the page.
 - Click *Sign Up* to register as a new user and create user name and password.
 - Select business account and enter company information.
 - Review and confirm information.
 - Read and accept the Privacy Act.

2 Select a Business Service (Section 2.6)

- Existing users select Mailing Reports
- New users must request access to Manage Mailing Activity services
 - Select [Manage Mailing Activity](#) (*PostalOne!*) under “Track & Report” (Section **Error! Reference source not found.**).
 - Select the business location to associate to the service (Section 2.6).
 - Confirms or cancel the business service request (Figure 2-19).
 - Assume the Business Service Administrator (BSA) role, or wait for approval for access (Section **Error! Reference source not found.**).

3 Manage Permits (Section 2.4)

- Click on Manage Permits (*PostalOne!*) to verify correct permits are linked to the desired business location. Users may view linked permits for a business location under the “Permit Profile” tab.
- BSAs may link additional permits by selecting the “Permit Validation” tab. If validation fails, BSA should contact the Help Desk at 800-522-9085 or at postalone@email.usps.gov

4 Access Transactions and Postage Statements (Section 4.5)

- Submit postage statements
 - a. Hard Copy
 - b. Electronically
 - i. Postal Wizard (Section 4.2, Figure 4-2)
 - ii. Mail.dat (Section 3.1)
 - iii. Mail.XML (Section 0)
- View, download, or print postage statements using the Dashboard (Section 4.5.1)
 - a. Search (Section 4.4.1, Figures 4-28 – 4-30)
 - i. Ensure that “Include Closed Jobs” check box is clicked
 - b. Download in Excel, CSV, and PDF formats
- Access Mailing Reports from the Gateway Signed-In page (Section 0)
- Cancel postage statements (Section 4.6)
- Select [View Transactions](#) (Section 5.1) user may access Postage Statement details under [Transaction Type Section](#) (Figure 5-2); Report displays postage amounts by line item for a permit and

postage statement type for permits that are linked to the locations in the User's Profile for the Manage or Audit Mailing Activity Service.

Note: Both Mail Providers and Mail Owners can access the same postage statements online, but have different access privileges. Mail Providers can view postage statements for all their clients. Mail Owners can access only their own Postage Statements. Mail Providers are encouraged to work with the Mail Owners to get access their postage statements. Postage statements can be downloaded in PDF, Excel or in Comma Separated Value (text only).

For questions regarding the Business Customer Gateway or Linking Permits, contact the Help Desk at 800-522-9085 or at postalone@email.usps.gov

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