

Welcome to the Getting Started with Full-Service training.

To assist customers in transitioning to Full-Service Intelligent Mail, this course provides an overview of Full-Service.

Agenda

- **Full-Service Requirements**
 - Intelligent Mail Barcodes
 - Electronic Documentation
- **Available eDoc Technologies**
 - Mail.dat®, Mail.XML™, Postal Wizard, IMsb Tool
- **Full-Service Mailing Solutions**
 - Commercial Software Vendors
 - Mail Service Providers
 - IMsb Tool
- **Getting Started**
 - BCG access
 - Obtaining a MID
- **Full-Service Benefits**
 - Per piece discounts; free address correction; ability to track and monitor service; elimination of permit fees; use of one permit across all mailing locations, (“Mail Anywhere”)

Agenda

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At the end of this module you will be able to do the following:

- understand the requirements for Full-Service Intelligent Mail, specifically relating to the Intelligent Mail barcodes and the submission of Electronic Documentation, or eDoc.
- understand the technologies available to submit your mailing information electronically: Mail.dat, Mail.XML, Postal Wizard, and the Intelligent Mail for Small Business tool.
- understand some of the available software solutions to help you in your transition
- know some tips on how to sign up, get an account, and acquire a Mailer ID, and
- understand the key benefits of Full-Service, which include receiving the per piece discounts, address correction on Full-Service pieces, the ability to track and monitor service, the elimination of permit fees, and the use of a single permit across all mailing locations nationwide (aka ‘Mail Anywhere’).

Let’s begin by reviewing the eligible mail classes for Full-Service Intelligent Mail and defining some common terminology.

Full-Service Intelligent Mail

- The following categories are eligible for a per piece Full-Service discount
 - **First-Class Mail® postcards, letters and flats**
 - **Standard Mail® letters and flats**
 - **Periodicals letters and flats**
 - **Bound Printed Matter flats**
 - **Standard Mail Basic Carrier Route (CR) flats**
 - **Standard Mail High Density CR flats**
 - **Standard Mail High Density Plus CR flats**
 - **Periodicals CR flats**
- *Not Eligible (even with an IMb)*
 - **Standard Mail Saturation CR flats**
 - **Bound Printed Matter CR flats or DDU-entered flats**
 - **Business Reply Mail (BRM), QBRM, CRM or PRM**

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Mailers who receive automation prices can qualify for an additional per piece discount on their mail by doing Full-Service.

The following classes of mail are eligible for Full-Service:

- First-Class Mail cards, letters and flats
- Standard Mail letters and flats
- Periodicals letters and flats
- Bound Printed Matter flats
- Standard Mail Basic Carrier Route flats
- Standard Mail High-Density Carrier Route flats
- Standard Mail High Density Plus Carrier Route flats
- Periodicals Carrier Route flats (all levels)

The following are not eligible for Full-Service, even when the pieces are barcoded with an Intelligent Mail barcode:

- Standard Mail Saturation Carrier Route flats
- Bound Printed Matter Carrier Route flats or Destination Delivery Unit (DDU)-entered flats
- Business Reply Mail (BRM), Qualified Business Reply Mail (QBRM), Courtesy Reply Mail (CRM), or Permit Reply Mail (PRM)

Please note that although QBRM and PRM do not qualify for Full-Service, both are still required to have an Intelligent Mail barcode.

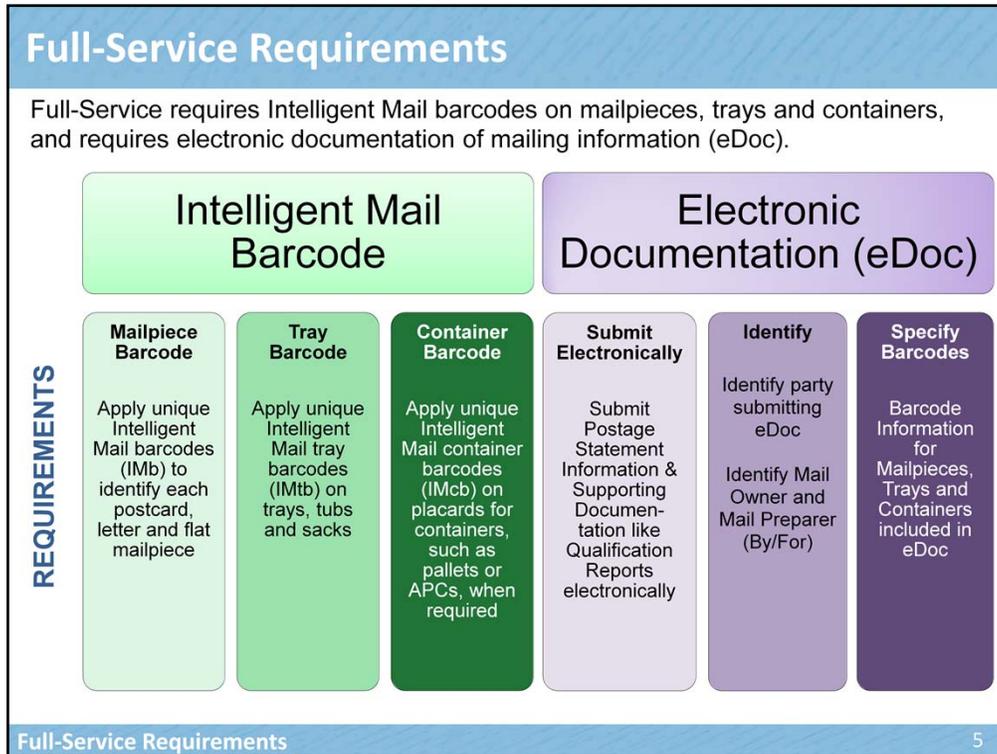
Common Terms and Definitions		
Term	Definition	Uses
Electronic Documentation (eDoc)	<ul style="list-style-type: none"> Electronic Documentation (or eDoc) allows mailers to submit mailing information – such as postage statements, qualification reports and other required documentation – electronically to USPS 	<ul style="list-style-type: none"> Expedites acceptance and payment verification eDoc is required for all Full-Service mailings
Permit	<ul style="list-style-type: none"> Payment account that is issued by USPS authorizing customers to mail at commercial rates 	<ul style="list-style-type: none"> Used to pay postage for commercial accounts
Customer Registration ID (CRID)	<ul style="list-style-type: none"> A unique ID number issued by USPS to identify a customer's physical business <u>location</u> (address) 	<ul style="list-style-type: none"> Used in eDoc to identify submitter of the file Used in eDoc to identify Mail Owner, and/or Mail Preparer
Mailer ID (MID)	<ul style="list-style-type: none"> A six- or nine-digit number issued by USPS to a mail owner or mail service provider 	<ul style="list-style-type: none"> Used in IMb barcodes Also used to identify Mail Owners and Mail Preparers within eDoc Used to determine to whom mailing information and reports should be distributed

Introduction

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Before we talk about the requirements for participating in Full-Service and what goes into an Intelligent Mail barcode, let's talk about some basic USPS terminology. It is important to understand the concepts of electronic documentation, permits, CRIDs and MIDs in commercial mailings.

- **Electronic Documentation (or eDoc)** allows mailers to submit mailing information – such as postage statements, qualification reports and other required documentation – electronically to USPS, expediting acceptance and payment verification. This information was traditionally provided to the Postal Service in hardcopy.
- With Full-Service mailings, mailers cannot submit hard copy postage statements. Mailers must submit postage statements and mailing documentation electronically using one of the eDoc methods described later on in the presentation.
- Next, a **Permit** is a payment account issued by USPS which authorizes a customer to mail at commercial rates. This is how customers pay for postage. Mailers must hold a permit and pay an annual mailing fee at every Business Mail Entry Unit (BMEU) or Post Office where they want to enter and pay for commercial mail.
- A Customer Registration ID or **CRID** is a unique ID number issued by USPS to identify a customer's physical business location (address). There are several uses for a CRID. The Postal Service uses this ID to link mailing events to a mailer's business location. In addition, the CRID is used to determine the recipient of Full-Service feedback data and provides access to a variety of reports. Mailers can use this ID in their eDoc files to identify the submitter of the eDoc. They can also use the Mailer ID to identify the Mail Owner and/or the Mail Preparer.
- A Mailer ID or **MID** is a six-digit or nine-digit number issued by USPS to a Mail Owner or Mail Service Provider based on calendar-year mail volume, as verified by volume reported in *PostalOne!*. The MID is used in Intelligent Mail barcodes, to identify Mail Owners or Mail Preparers within eDoc, and to determine to whom mailing information and reports should be distributed.
- Please note that there can only be **one** CRID for each physical location. However, there can be multiple Permits and MIDs associated to the one CRID.



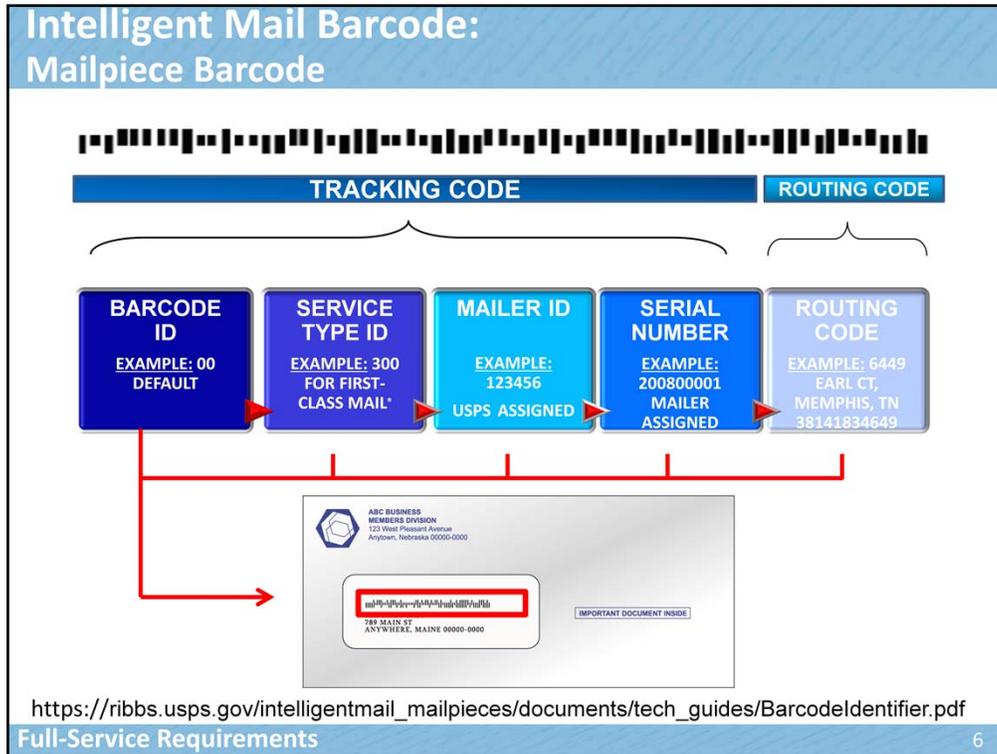
Now that we've discussed common Full-Service terminology, let's talk about the key Full-Service requirements.

Full-Service requires Intelligent Mail barcodes and eDoc.

Intelligent Mail Barcodes are required for Full-Service mailpieces, trays and containers. As we will discuss, the barcodes generally must be unique, with certain exceptions.

Electronic Documentation or eDoc is also required for Full-Service mailings. eDoc is a method by which mailers can send mailing information, such as postage statements and qualification reports, electronically to the Postal Service. Some of the key eDoc requirements we will discuss in this module include the identification of the eDoc submitter, identification of Mail Owner and Mail Preparer (known as the By/For relationship in eDoc), as well as the specification of barcode information such as MID and CRID within each eDoc submission.

First, let's focus on the Intelligent Mail barcode for mailpieces.



The Intelligent Mailpiece barcode consists of 31-digits composed of five Intelligent Mail barcode fields which are required for Full-Service. Let’s review the components of the IMb barcode.

The **Barcode ID** is a 2 digit field, that most often contains a default “00” (zero-zero). When it has a value other than “00”, it indicates optional endorsement line (or OEL) information. A mailpiece includes OEL information to specify the level of sortation of a bundle of mail. For example “30” is the OEL code for 3-digit sortation. More information is in the “Barcode Identifier document”, available on the RIBBS website at the address shown here: **[Note to presenter: do not read web address aloud]**

https://ribbs.usps.gov/intelligentmail_mailpieces/documents/tech_guides/BarcodeIdentifier.pdf

The **Service Type ID** indicates class of mail & additional services that were requested, such as tracing or Address Correction Service. At a minimum, it designates the mail class, as in the example of “300” indicating First-Class Mail. The Service Type ID should *not* be “000” (zero-zero-zero).

The **Mailer ID** is populated with a Mailer ID obtained from USPS. It can be the mail owner, mail preparer, or any stakeholder in the supply chain.

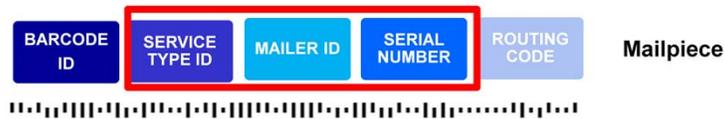
The **Serial Number** is a numbering sequence assigned by the mailer.

The **Routing code** identifies a valid delivery point address. This field must never be padded with zeroes, spaces or nulls.

Under the Full-Service option, mailers are required to use unique Intelligent Mail barcodes for mailpieces and handling units (trays or sacks) and keep those barcodes unique for 45 days. Let’s talk a little bit more about barcode uniqueness.

Intelligent Mail Barcode: Uniqueness

Barcode Uniqueness



- Full-Service mailings must use unique barcodes that don't repeat for 45 days from the date the mailing is accepted into the mailstream
 - **Exception**
 - For mailings less than 10,000 pieces where
 - postage is affixed to the piece at the correct price OR
 - all mailpieces are identical weight and separated by price
 - In these conditions, mailers may use identical barcode Serial Numbers within a single mailing but must maintain uniqueness across mailings for 45 days

Full-Service Requirements

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For Full-Service, the Intelligent Mail barcode must be unique. Barcode uniqueness for mailpieces, is determined through the combination of three fields: Service Type ID, MID and Serial Number.

Full-Service mailings must use unique Intelligent Mail barcodes that don't repeat for 45 days from the date the mailing is accepted into the mailstream.

There is an exception for mailings containing fewer than 10,000 pieces, where

- postage is affixed to the piece at the correct price OR
- all mailpieces are identical weight and separated by price

In these conditions, mailers may use identical barcode serial numbers on all mailpieces within a single mailing. This barcode serial number must maintain uniqueness across mailings for 45 days.

Intelligent Mail Barcode: Service Type ID

- The Service Type ID (STID) is a 3-digit code to identify the class of mail and any additional or special services requested for the mailpiece
 - Must be provided in the IMb
 - Must be contained in the eDoc
- A table of STIDs is available on the RIBBS website:
https://ribbs.usps.gov/intelligentmail_mailpieces/documents/tech_guides/std.pdf
 - The table shows which STID to use on a mailpiece to indicate the class of mail, type of address correction (ACS), and mailpiece tracking service requested



Full-Service Requirements

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The Service Type ID is another requirement for an Intelligent Mail barcode.

The Service Type ID is a 3-digit code to identify the class of mail and any additional or special services requested for the mailpiece such as the address correction (ACS) and mailpiece tracking.

The IMb must contain the accurate Service Type code in order for the Postal Service to effectively process the mailpieces per the service standard of the mail class and to fulfill the services requested such as ACS and tracking service.

A table of Service Type IDs is available on RIBBS at the address shown: **[Do not read web address aloud]**

https://ribbs.usps.gov/intelligentmail_mailpieces/documents/tech_guides/std.pdf

The STID table shows which 3-digit code to use in the mailpiece barcode to indicate the following:

- Class of Mail
- Type of Address Change Service (ACS) requested
- Whether the mailing is Full-Service or not
- Whether mailpiece tracking (IMb Tracing) is requested

Next we will talk about the Mailer ID, which is another required field in the Intelligent Mail barcode.

Intelligent Mail Barcode: Mailer ID

- The Mailer ID is a required field in the Intelligent Mail Barcode and is used in conjunction with the STID and Serial Number to maintain barcode uniqueness
- MIDs are either a 6- or 9-digit number based on a mailer's historic mail volume
 - The MID is 6 digits long for mailers with a combined annual volume of 10,000,000 pieces or more. These MIDs begin with a 0-8.
 - The MID is 9 digits long for mailers with a combined annual volume of less than 10,000,000 pieces. These MIDs begin with a 9.

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Barcode ID (2N)		Service Type ID (3N)			Mailer ID (6N)						Serial Number (9N)						Routing Code (0, 5, 9 or 11N)													

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Barcode ID (2N)		Service Type ID (3N)			Mailer ID (9N)									Serial Number (6N)						Routing Code (0, 5, 9 or 11N)										

Full-Service Requirements

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A Mailer ID (or MID) is used within the Intelligent Mail barcode of a mailpiece, tray or container, in combination with the Service Type ID and Serial Number, to maintain barcode uniqueness. The MID is a six- or nine-digit numeric code assigned to a Mail Owner or Mail Service Provider by USPS.

6-digit MIDs are assigned to Mail Owners or Mail Service Providers whose annual volume is greater than 10 million pieces. 6-digit Mailer IDs begin with a 0-8.

9-digit MIDs are assigned to Mail Owners or Mail Service Providers whose annual volume is less than 10 million pieces. 9-digit Mailer IDs begin with a 9. Mail Owners or Mail Service Providers may qualify for multiple nine-digit MIDs based on annual volume increments of one million pieces.

Together the Mailer ID and the Serial Number determine barcode uniqueness for handling units and containers. For mailpieces, the Service Type ID is used in conjunction with the MID and Serial Number to maintain uniqueness.

Unique Intelligent Mail Tray Barcode For Handling Units (IMtb)

Barcode Uniqueness

ZIP CODE EXAMPLE: MEMPHIS, TN 38141	CONTENT ID # EXAMPLE: 242 – FOR TRAYS OF FCM LETTERS WITH 5-DIGIT SORT	PROCESS- ING CODE EXAMPLE: 1 FOR AUTOMATION COMPATIBLE	MAILER ID EXAMPLE: 123456 USPS* ASSIGNED	SERIAL NUMBER EXAMPLE: 20080001 MAILER ASSIGNED	LABEL TYPE EXAMPLE: 1 FOR 6-DIGIT MID
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- Full-Service requires a unique Intelligent Mail tray barcode on all handling units (trays or sacks) for 45 days
- For Mailings less than 10,000 pieces, mailers may use identical Serial Numbers within a single mailing but must maintain uniqueness across mailings for 45 days if all pieces are identical weight and separated by price or if postage is affixed to the piece at the correct price

Full-Service Requirements
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Now that we've discussed the components and requirements of the Intelligent Mail barcode, let's look at the Intelligent Mail Tray barcode.

The Intelligent Mail Tray label is used on all trays and sacks. The 24-digit barcodes on tray labels uniquely identify each tray and sack as it makes its way through the Postal Service's mail processing and transportation networks. In addition to the ZIP Code™ and Content Identifier Number (CIN), the 24-digit IM tray barcode includes a Mailer ID (MID) and Serial number, which provide a variety of tracking and reporting benefits to mailers. Let's review the components of the tray and sack barcode.

- The **5-digit Zip Code**™ identifies the tray or sack's destination.
- The **Content ID #** describes the contents of the tray or sack with a 3-digit content identifier number. For example "242" is the Content Identifier Number for trays of First-Class Mail letters pre-sorted at the 5-digit level. The table is in section 708.6.2.4 of the Domestic Mail Manual, available at the web address shown here: [**Note to Presenter:** Do not read web address aloud] <http://pe.usps.com/text/dmm300/708.htm#1691170>
- The **Processing Code** describes the type of mail being processed. "1" is used for automation compatible, barcoded, & machinable mail. "7" is used for all other mail.
- The **Mailer ID** is the 6- or 9-digit number assigned by the Postal Service, as discussed previously for mailpieces.
- The **Serial Number** is a unique 5 or 8-digit number, depending upon the Mailer ID length. This field allows mailers to uniquely number the Intelligent Mail tray barcodes.
- The **Label Type** is a 1-digit field used as a qualifier for systems to recognize and parse the data within this barcode. The value is "1" when used with the 6-digit Mailer ID or "8" when used with a 9-digit MID.

As with Intelligent Mail barcodes on mailpieces, the barcodes on tray labels must be unique in Full-Service mailings. For Intelligent Mail Tray Barcodes, uniqueness is determined by the combination of MID and Serial Number. Tray labels must use unique Intelligent Mail barcodes that don't repeat for 45 days from the date the mailing is accepted into the mailstream. However, the same rule for mailings containing fewer than 10,000 pieces applies to tray labels: for Mailings less than 10,000 pieces, mailers may use identical Serial Numbers within a single mailing but must maintain uniqueness across mailings for 45 days if all mailpieces are identical weight and separated by price or if postage is affixed to the piece at the correct price.

Now let's take a look at the Intelligent Mail Container barcode.

Unique Intelligent Mail Container Barcode (IMcb)

SCF SAN FRANCISCO CA 940
STD FLTS SCF BC/NBC

XYZ CORPORATION
INTERNATIONAL FALLS, MN

USPS SCAN REQUIRED



99 M 123456 —ABC1234

(Mailer Area)



APPLICATION IDENTIFIER <small>EXAMPLE:</small> 99	TYPE INDICATOR <small>EXAMPLE:</small> M	MAILER ID <small>EXAMPLE:</small> 203401 USPS ASSIGNED,	SERIAL NUMBER <small>EXAMPLE:</small> 200800000001 Mailer Assigned
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Barcode Uniqueness

Full-Service requires a unique Intelligent Mail container barcode on the container placard for 45 days. Exceptions to this are explained in the next slides

Full-Service Requirements
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The Intelligent Mail Container barcode is applied to mailer-generated container labels and is designed to be scanned at acceptance. The Intelligent Mail Container barcode allows each container to be associated with a unique mailing and facilitates tracking of containers upon induction.

The same uniqueness that applies to tray labels and piece barcodes also applies to container barcodes in Full-Service mailings. Container barcodes must use unique Intelligent Mail barcodes that don't repeat for 45 days from the date the mailing is accepted into the mailstream.

Let's review the components of the container barcode.

- The **Application Identifier** is a two-digit field which indicates the source of the barcode. The value must always be "99".
- The **Type Indicator** is a one-character field which indicates a mailer generated barcode. The value must be set to "M" to indicate that it is a mailer-generated barcode.
- The **Mailer ID** identifies the mail owner, mail preparer, or other stakeholder in the supply chain and can either be a 6- or 9-digit number assigned by the USPS.
- The **Serial Number** is a mailer-assigned unique 9 or 12-digit number, depending on the Mailer ID length, that maintains the uniqueness of each container for tracking purposes. If all characters of the serial number are not used, mailers can pad the beginning of the field with zeros or dashes.

Container Placard

- Container Placards are usually required for Full-Service mailings but there are some exceptions
- When discussing the exceptions, the following terms are important to understand:
 - **BMEU:** mailings presented by a customer at a BMEU
 - **Processing Facility:** mailings verified at a BMEU but given back to mailer to be taken to a processing facility
- Generally container barcodes and placards are not required for small volume mailings entered at a BMEU or Post Office

Full-Service Requirements

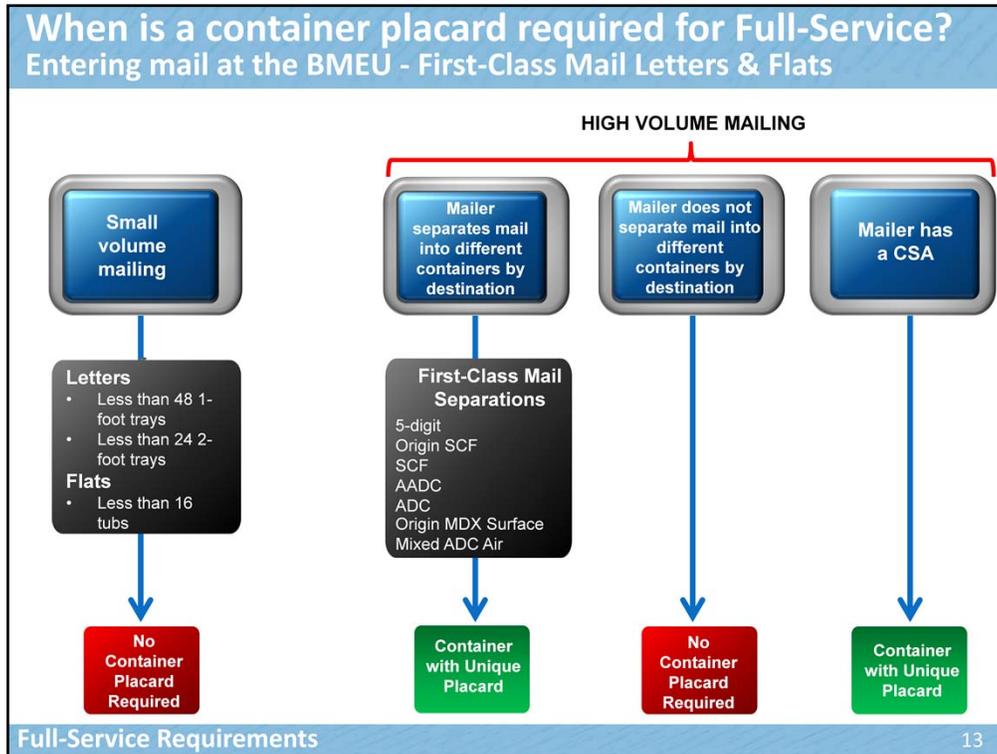
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Now we will look in more detail on when Container Placards are required.

Container Placards are usually required for Full-Service mailings but there are some exceptions. When discussing the exceptions, the following terms are important to understand:

- BMEU – mailings presented by a customer at a BMEU
- Processing Facility – mailings verified at a BMEU but given back to mailer to be taken to a processing facility

Generally container barcodes and placards are not required for small volume mailings entered at the BMEU/Post Office. We'll discuss details next



When entering First-Class Mail letters and flats at the BMEU, the type of mailing dictates whether a container placard is or is not required for Full-Service mailings. There are cases where no container placard is required. For example, no container placard is required for a small volume mailing, which in this case means one of the following:

- Fewer than 48 1-foot trays of letters
- Fewer than 24 2-foot trays of letters or
- Fewer than 16 tubs of flats

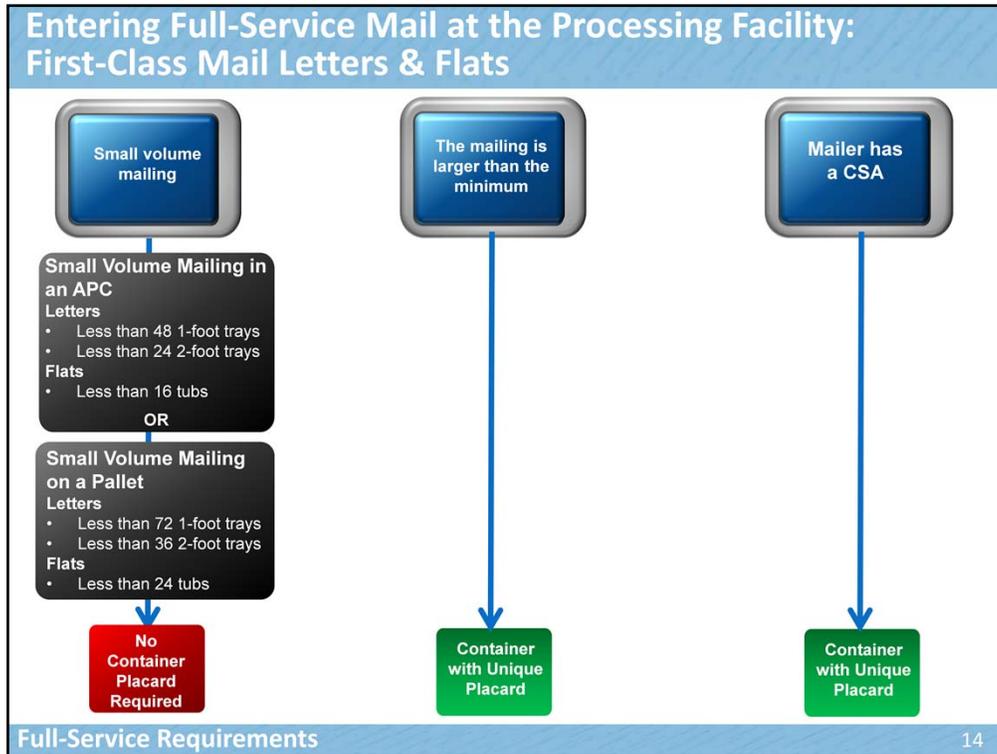
Mailings that are under the minimum threshold and are contained in mixed containers, do not need the placard.

For a higher volume mailing, if the mailer separates mail into different containers by destination at one of these specified presort levels (5-digit, Origin SCF, SCF, AADC, ADC, Origin MDX Surface, Mixed ADC Air) then a container barcode and placard are required. The separation must follow the requirements of the DMM and/or a Customer Supplier Agreement (CSA)

For a higher volume mailing of First-Class letters or flats that is not separated into different containers by destination, no container with placard is required.

Finally, for a mailer with a Customer Supplier Agreement (CSA), higher volume mailings of First-Class Mail generally require containers with unique placards. In some cases, the CSA for a particular mailer might specify a minimum volume below which a container is not required.

Next we'll look at placard rules for First-Class Mail taken to a processing facility.



This diagram shows when a container placard is required for Full-Service First-Class Mail letters and flats entered at a processing facility.

No container placard is required for a small volume mailing, which in this case means the same as for mail entered at a BMEU for mail in an APC (All Purpose Container).

That is, no container placard for a mailing in an APC if the mailing is

- Fewer than 48 1-foot trays of letters
- Fewer than 24 2-foot trays of letters or
- Fewer than 16 tubs of flats

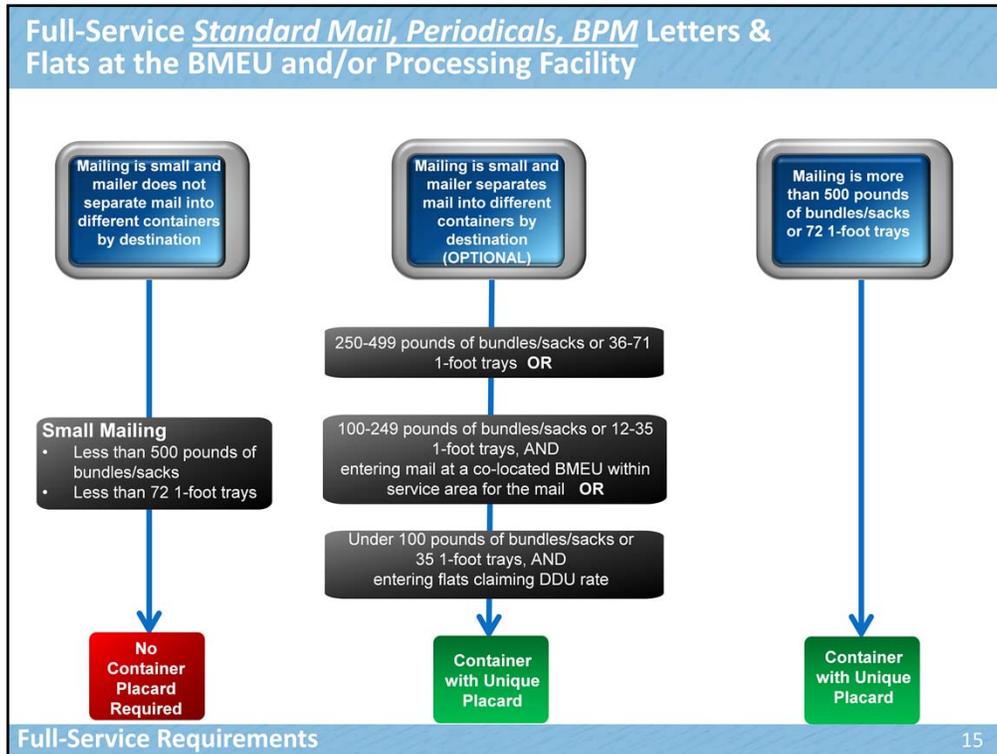
If the mailing is on a pallet rather than in an APC, here are the thresholds for a small volume mailer, in which case no container placard is required:

- Fewer than 72 1-foot trays of letters,
- Fewer than 36 2-foot trays of letters or
- Fewer than 24 tubs of flats

If the mailing is larger than these minimums a container placard is required.

If the mailer has a Customer Supplier Agreement (CSA) with the USPS, First-Class Mail letters and flats entered at a processing facility generally does require containers with unique placards. In some cases, the CSA for a particular mailer might specify a minimum volume below which a container is not required.

Next we'll look at placarding requirements for other mail classes.



This diagram shows when a container placard is required for Full-Service Standard Mail, Periodicals, and Bound Printed Matter Letters and Flats presented for acceptance at a BMEU or Processing Facility.

First, a container placard is not required if the mailing presented for acceptance is small and not separated into different containers by destination. In this case a small mailing means either

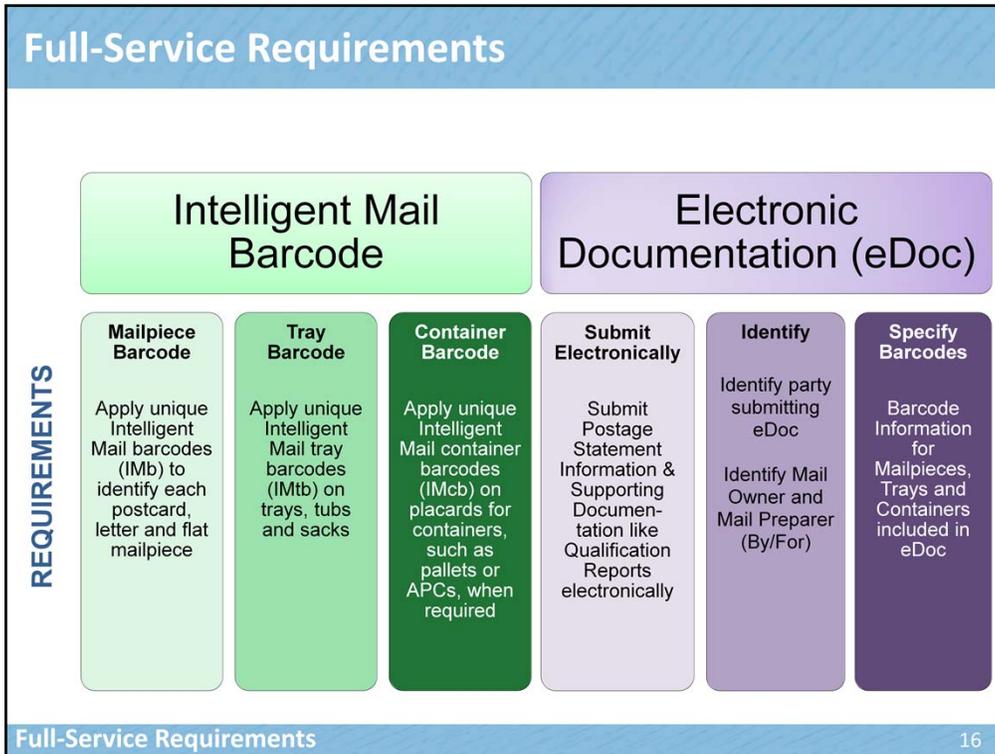
- Less than 500 pounds of bundles and sacks or
- Fewer than 72 1-foot trays

A container placard is required for small mailings presented for acceptance and separated into different containers by destination. Note that this separation is optional. This type of mailing requires a container placard in any of the following cases:

- 250 to 499 pounds of bundles or sacks or 36 to 71 1-foot trays OR
- 100 to 249 pounds of bundles or sacks or 12 to 35 1-foot trays AND the mail is entered at a co-located BMEU with the service area for the mail OR
- Under 100 pounds of bundles or sacks or 35 1-foot trays AND the mail is flats claiming DDU rate

Finally, a container placard is required for larger mailings of Full-Service Mail, Periodicals or BPM Letters and Flats presented for acceptance. Here a larger mailing means:

- More than 500 pounds of bundles or sacks or
- More than 72 1-foot trays



Now that we've discussed the Full-Service Intelligent Mail barcode requirements, let's discuss the eDoc requirements.

eDoc Requirement

- **What is eDoc?**

- Allows mailers to submit mailing information that is traditionally provided via postage statements and qualification reports electronically through the *PostalOne!* system

- **What goes in eDoc submissions?**

- Postage Statement information
- Qualification information – presort and entry facilities
- Unique barcodes for mailpieces, handling units such as trays and sacks, and containers
 - Exception for certain mailings under 10,000 pieces
 - Nesting information, which may include “logical handling units”
- Identification of eDoc submitter, Mail Owner and Mail Preparer

Full-Service Requirements

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Electronic Documentation (eDoc) is required for Full-Service mailings. eDoc allows mailers to submit mailing information, such as postage statements and qualification reports, electronically to USPS through the *PostalOne!* system, expediting acceptance and payment verification.

There are several key pieces of information that go into an eDoc submission, including:

- Postage Statement information
- Qualification information – presort and entry facilities
- Unique barcodes for mailpieces, handling units (such as trays and sacks), and containers
- nesting information
- Identification of eDoc submitter, Mail Owner and Mail Preparer

Electronic documentation must include the Postage Statement information for a mailing, as well as the presort information to support the creation of required qualification reports.

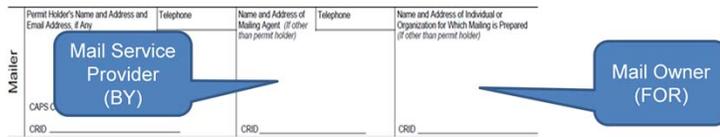
Electronic documentation must include all of the required Intelligent Mail barcode data concerning the mailpieces, trays or sacks, and containers used in the mailing. There is an exception to providing Intelligent Mail barcode information for simple mailings under 10,000 pieces. Mailings under 10,000 pieces are “simple” if the mailer chooses to either apply the same serial number to every mailpiece in the mailing or a range of serial number. A simple mailing does not have to include the Intelligent Mail tray barcode or Intelligent Mail container barcode. The mailer should include a record for every piece in the mailing including the Intelligent Mail barcode.

The eDoc must also describe how each mailpiece is linked to a uniquely identified tray or sack (known as a “handling unit”), if applicable, and how each mailpiece and tray or sack is linked to a uniquely identified container. This is referred to as a nesting relationship. A special case of nesting involves “logical handling units”. In the case when multiple trays or sacks are created with the same presort level and ZIP Code destination, the mailer may treat this group of trays/sacks as a single, logical unit called a logical handling unit. A mailpiece is then linked to the logical handling unit, telling us what group of trays/sacks a mailpiece is in, rather than the specific handling unit (that is, tray or sack). The physical uniquely identified tray or sack will also be provided in the electronic documentation as a “sibling” of the logical handling unit.

Also required in eDoc is the identification of the eDoc submitter as well as identification of the Mail Owner and Mail Preparer, also known as the By/For relationship. Let’s talk a little more about this relationship and how it is identified within a mailer’s eDoc.

eDoc Requirements

- Mail Owners and Mail Service Providers (MSPs) must be identified within the eDoc. This identification is called By/For.



Note: For simplification, a hard copy postage statement is used to represent electronic documentation since the concepts are similar within eDoc

- The Mail Owner is always required to be identified within eDoc either by a CRID, MID, or Permit
- A Mail Service Provider must identify themselves using a CRID or MID
- The party that submits the eDoc (eDoc Submitter) also must identify themselves using a CRID

Exception: If a Mail Service Provider mails for multiple Mail Owners and some have fewer than 5,000 pieces per mailing, those Mail Owners do not need to be identified within eDoc to claim the Full-Service discount but will need to be included if the Mail Owner wishes to receive Full-Service Feedback such as address correction.

Full-Service Requirements

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As stated previously, Mail Owners and Mail Service Providers (MSPs) must be identified within the eDoc. This identification is called By/For where the mail is prepared BY the Mail Service Provider and Mail is prepared FOR the Mail Owner. The Mailing Service Provider and the Mail Owner may be different parties or may be the same party. For example, when a Mail Owner submits their own mailing, they are essentially serving as their own Mail Service Provider. The identification of By/For information helps USPS establish who prepared the mailing and for whom who it was prepared.

In Full-Service, the Mail Owner is always required to be identified within eDoc either by a CRID, MID, or Permit, even if the Mail Owner is utilizing a Mail Service Provider for all aspects of their mailing. A Mail Service Provider must identify themselves using a CRID or MID. The party that submits the eDoc (known as the eDoc Submitter) also must identify themselves using a CRID. If a Mail Owner wishes to direct the Full-Service feedback data (such as address correction data or tracking data) to a third party to process for them, a MID should be used to identify the Mail Owner; this allows the data distribution capability to direct the Postal Service to forward this data to another party.

Please keep in mind that there is an exception to the By/For requirement. If a Mail Service Provider mails for multiple Mail Owners and some have fewer than 5,000 pieces per mailing, those Mail Owners do not need to be identified within eDoc to claim the Full-Service discount but will need to be included if the Mail Owner wishes to receive Full-Service Feedback.

Notice that a valid Mailer ID is a required field both in the barcode and in the mailer's eDoc. This is because there are two distinct and separate purposes of a MID. A MID is used to identify a Mailing Agent and/or Mail Owner within eDoc, as just discussed. The other use of a MID, as discussed previously, is within the physical barcode of a mailpiece, tray or container, in combination with a serial number (and in the case of mailpieces, a Service Type ID).

Agenda

- **Full-Service Requirements**
 - Intelligent Mail Barcodes
 - Electronic Documentation
- **Available eDoc Technologies**
 - Mail.dat, Mail.XML, Postal Wizard, IMsb Tool
- **Full-Service Mailing Solutions**
 - Commercial Software Vendors
 - Mail Service Providers
 - IMsb Tool
- **Getting Started**
 - BCG access
 - Obtaining a MID
- **Full-Service Benefits**
 - Per piece discounts; free address correction; ability to track and monitor service; elimination of permit fees; use of one permit across all mailing locations, ("Mail Anywhere")

Agenda

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Now that we've discussed the Full-Service requirements for Intelligent Mail barcodes and eDoc, let's talk about the four options for submitting electronic documentation. These are

- Mail.dat
- Mail.XML
- Postal Wizard and
- The Intelligent Mail for Small Business Tool

eDoc Requirement

- The four options for submitting electronic documentation are:
 - Mail.dat
 - Mail.XML
 - Postal Wizard
 - For mailings of less than 10,000 identical-weight pieces or less than 10,000 pieces with correct postage affixed to each mailpiece
 - Intelligent Mail for Small Business (IMsb) Tool
 - For mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually

Full-Service Requirements

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When a mailing with under 10,000 pieces does not require a qualification report, mailers may use any of the four submission methods to enter their mailing information. For mailings of 10,000 pieces or more, mailers must provide their electronic documentation through Mail.dat or Mail.XML. This documentation will include all of the required Intelligent Mail barcode data concerning the mailpieces, trays or sacks, and containers used in the mailing.

When mailers separate pieces of identical weight, or when the correct postage is affixed to each mailpiece in Full-Service mailings of less than 10,000 pieces, mailers are only required to submit a postage statement and no other supporting documentation, such as a qualification report, is required. Postal Wizard can be used in this instance to enter in the postage statement online. Typically, a mailer that is required to provide supporting documentation such as a qualification report, which details the presort makeup of the mailing, cannot use the Postal Wizard. The Postal Wizard only accepts postage statements and no supporting documentation.

Mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually can submit electronic documentation using the Intelligent Mail for Small Business tool.

Now let's discuss each of these methods in more detail.

Available eDoc Technologies

Mail.dat	Mail.XML	Postal Wizard	Intelligent Mail Small Business Tool (IMsb)
<ul style="list-style-type: none">• Mailer uses own software or vendor software to create electronic file• Mail.dat is an electronic file that represents the mailing and contains the Postage Statement and qualification information• Mail.dat uses a fixed file format to send mailing information	<ul style="list-style-type: none">• Mailer uses own software or vendor software to create electronic file• Mail.XML is an electronic file that represents the mailing and contains the Postage Statement and qualification information• Allows two-way conversational communication letting the customer select data fields submitted	<ul style="list-style-type: none">• Separate software is needed to generate barcodes• Mailer types information into online forms in Postal Wizard, a USPS tool• Postal Wizard creates the electronic postage statement	<ul style="list-style-type: none">• Designed specifically for small-volume mailers• Allows mailers to print an Intelligent Mail Barcode on pieces and tray labels and to prepare Full-Service mailings, including electronic submission of postage statements

Full-Service Requirements

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The Mail.dat method uses an electronic file that contains detailed information about the mailing. Mailers typically use commercially available software to generate their Mail.dat electronic files. Mail.dat uses a fixed file format to send mailing information.

Mail.XML is also an electronic file that contains information about the mailing. Like Mail.dat, mailers typically use commercially available software to create Mail.XML electronic files. Mail.XML allows two-way conversational communication letting the customer select data fields submitted.

The mailing information contained in both Mail.dat and Mail.XML represents the Postage Statement and Qualification Report for the mailing. There is a host of commercially available software products that will help mailers cleanse addresses, presort mail and prepare & submit Full-Service mailings using Mail.dat or Mail.XML.

When providing electronic documentation to USPS using Postal Wizard, the mailer uses separate software to generate the Intelligent Mail barcodes and perform presort. Postal Wizard is available for mailings under 10,000 pieces. Mailers planning to use the Postal Wizard have two choices when generating Intelligent Mail barcodes. They can put the same serial number on every piece in the mailing (known as mailing ID) or they can use a range of barcodes. After presort, the mailer will type information into the online forms in the USPS Postal Wizard tool. The mailer will include the Mailer ID applied to the pieces and either the Mailing ID or the Highest and Lowest Piece ID from the range. The Postal Wizard creates the electronic postage statement.

The Intelligent Mail for Small Business tool allows mailers to upload an address list, generate Intelligent Mail barcodes and tray labels to affix to mailpieces, and then submit an eDoc. IMsb is designed specifically for small-volume mailers (less than 10,000 pieces per mailing and less than 250,000 annually).

Agenda

- **Full-Service Requirements**
 - Intelligent Mail Barcodes
 - Electronic Documentation
- **Available eDoc Technologies**
 - Mail.dat, Mail.XML, Postal Wizard, IMsb Tool
- **Full-Service Mailing Solutions**
 - Commercial Software Vendors
 - Mail Service Providers
 - IMsb Tool
- **Getting Started**
 - BCG access
 - Obtaining a MID
- **Full-Service Benefits**
 - Per piece discounts; free address correction; ability to track and monitor service; elimination of permit fees; use of one permit across all mailing locations, ("Mail Anywhere")

Agenda

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Let's talk about the available Full-Service Mailing Solutions for customers.

Here are three examples of Full-Service solutions:

- Software products from Commercial Software Vendors,
- Mail Service Providers and
- The Intelligent Mail for Small Business (IMsb) tool

First, let's discuss commercial software products.

Commercial Mailing Software Vendors

- Mailing software vendors offer easy, ready-to-go solutions for preparing and submitting Full-Service mailings
 - **Mail.dat/Mail.XML** Vendors offer software solutions for mailers who wish to use software to prepare presort mailings, generate unique barcodes, and submit mailing information electronically to USPS.
 - **Postal Wizard** Vendors offer software solutions which allow mailers to presort mail and generate unique barcodes, but require the mailer to enter the postage statement information online via the online Postal Wizard tool

Full-Service Mailing Solutions

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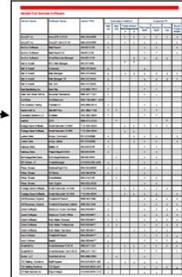
Using Commercial Mailing Software makes the required eDoc process much simpler for mailers. Mailing software vendors offer easy, ready-to-go solutions for preparing and submitting Full-Service mailings.

One type of solution these vendors offer is for Mail.dat and Mail.XML. These solutions are for mailers who wish to use mailing software to not only prepare presort mailings and generate unique barcodes, but to submit mailing information electronically to USPS as well.

A second type of solution these vendors offer is to be used in conjunction with Postal Wizard. These solutions allow mailers to presort mail and generate unique barcodes, but require the mailer to enter the postage statement information online via the online USPS Postal Wizard tool.

Commercial Mailing Software Vendors (Cont'd)

- For a list of software vendors that offer dynamic Full-Service solutions and have tested them with USPS, reference the following documents on RIBBS:
 - The [summary list](#) lists the software vendors and products that have been tested through the USPS Test Environment for Mailers, using Mail.dat, Mail.XML and/or Postal Wizard.
 - The [detailed list](#) provides more in-depth details about the capabilities and offerings of each software vendor
 - **Mailers using a product on one of these lists can start mailing in production without additional testing in the Test Environment for Mailers (TEM).** Mail Owners and Mail Service Providers who wish to validate a Full-Service test mailing can do so by submitting a single file through TEM per the instructions in the short document “Test Process for Full-Service Mail.dat & Mail.XML Mailings” available on RIBBS:
https://ribbs.usps.gov/electronicdoc/documents/tech_guides/TEMProcessMailing_sMaildat_MailXML.pdf



Full-Service Mailing Solutions

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A list of software vendors who have voluntarily tested their software with the Postal Service can be found on the RIBBS website in the Certifications section eDoc and Full-Service page. The web address is shown here: [**Note to presenter:** Do not read web address aloud]
<https://ribbs.usps.gov/index.cfm?page=electronicdoc>

A high-level document lists the software vendors and products that offer Full-Service solutions using Mail.dat, Mail.XML, and/or Postal Wizard. These vendors and products have been tested with the USPS. A direct link to this document is included here. [**Note to presenter:** Do not read web address aloud]
https://ribbs.usps.gov/uniqueimb/documents/tech_guides/VendorFullServiceCapabilities.pdf

A second document available on RIBBS is a Microsoft Excel spreadsheet document that provides more in-depth details about the capabilities and offerings of each software vendor that has tested their product with the USPS. A direct link to this document is included here. [**Note to presenter:** Do not read web address aloud]
https://ribbs.usps.gov/electronicdoc/documents/tech_guides/FullVendorMatrix.xls

Mailers using a product on one of these lists can start mailing in production without additional testing in the Test Environment for Mailers (TEM). Mail Owners and Mail Service Providers who wish to validate a Full-Service test mailing can do so by submitting a single file through TEM per the instructions in the short document “Test Process for Full-Service Mail.dat & Mail.XML Mailings” located on RIBBS at this web address [**Note to presenter:** Do not read web address aloud]
https://ribbs.usps.gov/electronicdoc/documents/tech_guides/TEMProcessMailingsMaildat_MailXML.pdf

Vendor Full-Service Software Capabilities

Vendor Full-Service Software

Vendor Name	Software Name	Vendor POC	Submission Method				Supports Full-Service			
			Mail.dat	Mail.XML	Postal Wizard A	Postal Wizard B	First-Class Mail®	Standard Mail®	Periodicals	Bound Printed Matter
AccuZIP Inc	AccuZIP 5.06	800-233-0555	X				X	X	X	X
AccuZIP Inc	AccuZIP 5.07	800-233-0555			X	X	X	X	X	X
AccuZIP Inc	AccuZIP Lite 5.07.00	800-233-0555			X	X	X	X		X
Address Vision Inc	Manifest Reporter	800-796-2676	X				X			
Anchor Software	MaxPresort	240-631-2100	X				X	X		X
Anchor Software	MaxPresort OS	240-631-2100	X				X	X		X
Anchor Software	SmartBarcode Manager	240-631-2100			X	X	X	X	X	X
Bell & Howell LLC	ECC Mail Manager	800-337-0442			X	X	X	X	X	X
Bell & Howell LLC	ECC Mail Manager	800-337-0442	X	X			X	X	X	X
Bell & Howell LLC	ECC Mail Manager FS	800-337-0442	X	X			X	X	X	X
Bell & Howell LLC	ECC Mail Manager LE	800-337-0442		X			X	X	X	
Bell & Howell LLC	Ner Sort	800-337-0442	X				X	X		
Best Manifesting Inc	Best Ship	215-606-7570	X				X	X		X
Data Tech Smart Soft Inc	Accumail Frameworks	888-227-7221	X				X	X	X	X
DuoShare	DuoShare.com	800-749-8307 x235		X			X	X		X
Flagship Software	iAddress	866-672-0907 x5	X				X	X	X	X
Flex Systems Trading	FlexMail 4.0	805-888-0014	X				X	X		
Hardin-Soft Inc	EMVIN Plus	281-689-7106	X	X			X	X		
Innovative Systems LLC	iS Mailer	302-262-5934	X				X	X		
Interlink	Interlink Circulation	888-473-3103		X			X	X		
Lorton Data	A-Qua Mailer Command	651-203-8290	X				X	X	X	X
Lorton Data	A-Qua Mailer Desktop	651-203-8290	X				X	X	X	X
Lorton Data	A-Qua Mailer/IVB	651-203-8290	X				X	X	X	X
Lorton Data	A-Qua Mailer Command	651-203-8290				X	X	X	X	X
Lorton Data	A-Qua Mailer Desktop	651-203-8290				X	X	X	X	X
Lorton Data	A-Qua Mailer/IVB	651-203-8290				X	X	X	X	X
Melissa Data	Mails-4	800-800-6245	X				X	X	X	X
Melissa Data	Presort Object 9.01.00.0	800-800-6245	X				X	X		

Full-Service Mailing Solutions

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Vendors offer a variety of software products to prepare and present presort mailings which support Full-Service. The table on this slide and the next slide is the summary list of two of the types of software products that have been tested with the Postal Service and that support Full-Service mailings: Presort Software with Mail.dat and Mail.XML and Presort Software with Postal Wizard. The third type of software tested with USPS, Post Presort Software, will be discussed in a moment.

Presort Software with Mail.dat /Mail.XML - Software products in this category allow mailers to presort mail, typically generate unique Intelligent Mail barcodes for mailpieces, trays and containers and submit mailing information electronically using Mail.dat or Mail.XML transmission methods. Electronic postage statements are created automatically from the information contained in the Mail.dat or Mail.XML files. The Mail.dat and Mail.XML columns in this chart identify vendors and products in this category.

Presort Software with Postal Wizard - Software products in this category allow mailers to presort mail and typically generate unique Intelligent Mail barcodes for mailpieces and trays. Mailers planning to use the Postal Wizard have two choices when generating Intelligent Mail barcodes. They can put the same serial number on every piece in the mailing (known as mailing ID) or they can use a range of barcodes. To complete the Full-Service transaction, mailers must then enter Postage Statement information online via the USPS Postal Wizard tool where they annotate the range of Intelligent Mail barcodes used in a mailing or the mailing ID. Remember that as noted previously, Postal Wizard is for Full-Service mailings of less than 10,000 pieces, when mailers separate pieces of identical weight, or when the correct postage is affixed to each mailpiece.

The columns labeled Postal Wizard in this chart indicate the software products that support the Postal Wizard submission method. The column marked "A" indicates products supporting the same serial number on every piece in the mailing, while column "B" indicates products supporting the use of a range of barcodes.

The "Supports Full-Service" columns on the right side of the chart display the four mail classes that are currently supported for Full-Service mailings: First-Class Mail (FC), Standard Mail (STD), Periodicals (PER), and Bound Printed Matter (BPM). An "X" in these columns depicts the specific mail classes that are supported by each product.

Vendor Full-Service Software Capabilities (Cont'd)

Vendor Name	Software Name	Vendor POC	Submission Method				Supports FS				
			Mail.dat	Mail.XML	Postal Wizard A	Postal Wizard B	First-Class Mail®	Standard Mail®	Periodicals	Bound Printed Matter	
MyPostageRate Saver	MyPostageRate Saver	888-402-9042		X				X	X		
NPI Fontes LP	PostalManager	214-634-2288 x103	X					X	X		
Pinney Bowes	AddressRight Pro	800-322-8000	X	X				X	X		X
Pinney Bowes	DFWorks	205-794-8754	X					X			
Pinney Bowes	SmartMailer	905-219-1196		X				X	X		
Pinney Bowes	SmartMailer 7	905-219-3196					X	X	X		
Pinney Bowes	SmartMailer 7 Premium Edition	905-219-3196					X	X	X		
Pinney Bowes	Sort Engine	800-622-0020	X					X	X		
Postage Saver Software	Smart Barcode 3.5 WIN /MAC	715-334-6234			X	X		X	X	X	X
Primadata Inc	MailStream Plus	920-347-1961	X					X	X		
QMSI	QSORT	888-284-1001	X					X	X		
SAR/Business Objects	PostalSoft Business Edition	800-793-7349	X					X	X	X	X
Sitor Software	Mailroom Toolkit Architect	800-653-6477	X					X	X	X	X
Sitor Software	Mailroom Toolkit Office	800-653-6477	X					X	X	X	X
Sitor Software	Bulk Mailer Business	800-653-6477	X	X				X	X	X	X
Sitor Software	Bulk Mailer Professional	800-653-6477	X	X				X	X	X	X
Sitor Software	Bulk Mailer Standard	800-653-6477				X		X	X	X	
Sitri Software	Bulk Mailer Standard	800-653-6477		X				X	X	X	
Sitri Software	PostalSoft Presort	800-653-6477	X					X	X	X	X
Sitri Software	Mailjob	800-653-6477	X					X	X	X	X
SmartSoft Inc	SmartAddresser 5.06.00	888-227-7221	X					X	X		X
Synte, LLC	AutoMail eDocs	800-899-2540		X				X			
TEC Mailing Solutions	MailPreparer	608-625-8525 x201	X		X	X		X	X		
TEC Mailing Solutions	TECAgors	608-625-8525 x201	X					X	X	X	X
TEC Mailing Solutions	Web Services API	608-625-8525 x201	X					X	X		
Vareo Energy	Presort	806-324-4596		X				X			
ZIP Mail Services Inc.	Report Magic	314-645-6055 x123	X					X	X		

Full-Service Mailing Solutions

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This is a continuation of the table from the previous slide, showing the summary list of Presort Software with Mail.dat and Mail.XML and Presort Software with Postal Wizard.

Next let's look at the other type of software tested with USPS, Post Presort Software.

Vendor Full-Service Software Capabilities (Cont'd)

- Post Presort Software Vendors
 - The chart below identifies vendors and products that support post-presort processes for Full-Service mailings.

Post-Presort Vendors										
Vendor Name	Software Name	Vendor POC	Submission Method				Mail Classes Supported			
			Mail.dat	Mail.XML	Foxtel Wizard		First-Class Mail®	Standard Mail®	Periodicals	Bound Printed Matter
					A	S				
Assurety Consulting Inc	AIJ5	866-750-4924	X				X	X	X	X
Bell & Howell	cQuencer	800-337-0442	X				X			
Bell & Howell	cQuencer Standard Mail	800-337-0442	X					X		
Grayhair Software Inc	Select Solutions	856-727-9372	X				X	X		
Monticello	Mailob	540-854-4200	X				X	X	X	X
WindowBook	Dat-Mail	617-395-4569	X				X	X	X	X

Charts current as of 3/7/2014. For the latest list update and more information about transitioning, please visit fbbs.usps.gov and click **Getting Started** under the Intelligent Mail® Services tab.

Post Presort software provides mailers with the ability to edit and consolidate Mail.dat files which have already been presorted using a different software. Post presort software provides mailers with the ability to edit information within a presort file with accurate information for drop ship dates, entry-point assignments, piece attributes and container status. Post Presort software typically supports the creation of unique Intelligent Mail (IMb) handling unit labels (IMtb) and container label (IMcb) barcodes to qualify for Full-Service discounts and the submission of electronic documentation.

Again, mailers using a product listed on this document do not need to go through TEM testing. Let's talk a little more about the TEM process.

TEM Testing

Testing Process for Mailers

- Mailers who **are not using** vendor software that has been tested with USPS need to submit test electronic mailing information through the Test Environment for Mailers (TEM)
 - Mailers should follow the instructions in the following documents:
 - TEM Process for Mailings using Software Not Tested ([Link to document](#))
 - How to Submit Mail.dat Files to TEM ([Link to Document](#))
 - How to Submit Mail.XML Files to TEM ([Link to Document](#))
- Mailers who **are using** software pre-approved by USPS, may *choose* to test their ability to submit electronic mailing information by using TEM, though they are *not required* to do so.
 - Instructions are in the document “TEM Process for Mailings Using Mail.dat or Mail.XML” ([Link to Document](#))

The Test Environment for Mailers (TEM) is a test platform designed to allow mailers to test their ability to submit electronic mailing information such as Full-Service mailings to the Postal Service.

Mailers who **are not using** vendor software that has been tested with USPS must test their files in TEM. Customers developing their own software must also go through the TEM process. Several instructional documents for how to submit mailings to the TEM environment are available on RIBBS. The names and web addresses are shown here.

“TEM Process for Mailings using Software Not Tested”

“How to Submit Mail.dat Files to TEM”

“How to Submit Mail.XML Files to TEM”

Mailers who **are using** software pre-approved by USPS, may *choose* to test their ability to submit electronic mailing information by using TEM, though they are *not required* to do so. Instructions are in the document “TEM Process for Mailings Using Mail.dat or Mail.XML” document on RIBBS

TEM Testing (Cont'd)

Testing Process for Mailers

- Once mailers go through the TEM process, they can submit their files to production using their Business Customer Gateway account
 - Instructions are in 2 documents posted on RIBBS:
 - How to Submit Mail.dat Jobs to *PostalOne!* ([Link to document](#))
 - How to Submit Mail.XML Jobs to *PostalOne!* ([Link to Document](#))

Once mailers go through TEM, they can submit their files to production using their Business Customer Gateway (or BCG) account. We'll give more information on the BCG in a moment.

Instructions for submitting Mail.dat files to *PostalOne!* are in the document at the link on this slide: [**Note to presenter:** Do not read web address aloud]

https://ribbs.usps.gov/electronicdoc/documents/tech_guides/GuideSubmittingMail_datFilesPostalOne.pdf

Instructions for submitting Mail.XML files to *PostalOne!* are in the document at the link on this slide: [**Note to presenter:** Do not read web address aloud]

https://ribbs.usps.gov/electronicdoc/documents/tech_guides/GuideSubmittingMail_XMLFilesPostalOne.pdf

Mail Service Providers and Intelligent Mail for Small Business

- **Mail Service Providers (MSPs)**

- Offer a wide variety of services for Mail Owners
- Talk to your MSP to learn more about the Full-Service solutions they offer
- There are many advantages of using an MSP to prepare your mailings. Some of the services an MSP can provide include:
 - provide/manage your address list
 - print and/or presort your mailing
 - enter your mailing with the greatest discounts possible
 - manage your feedback such as ACS
 - monitor mail quality reports

- **USPS Intelligent Mail for Small Business (IMsb) Tool**

- Online tool to help small business mailers prepare Full-Service mailings with Intelligent Mail barcodes and tray labels
- For mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually
- To learn more about the IMsb tool and how to get started, reference the IMsb user guide on RIBBS:
 - https://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/IMsbUserGuide.pdf

In addition to using a Commercial Mailing Software Vendor, mailers have two additional Full-Service mailing solutions available for their use: a Mail Service Provider (MSP) and the USPS Intelligent Mail for Small Business (IMsb) tool.

Mail Service Providers offer varying levels of solutions depending on mailers' capabilities and requirements. Mailers are encouraged to talk to their MSP to learn more about the Full-Service solutions they offer.

Mail Service Providers include, but are not limited to the following: Printer, letter shop, address list provider/manager; mail preparer, postage payment provider, mailing logistics provider, mailing tracking provider, ad agency, and mailing information manager.

Small business mailers can use the USPS Intelligent Mail for Small Business tool to prepare Full-Service mailings with Intelligent Mail barcodes and tray labels. This tool is designed specifically for small business mailers, who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually. For more information on the IMsb tool and how to get started, reference the IMsb User Guide on RIBBS.

Agenda

- **Full-Service Requirements**
 - Intelligent Mail Barcodes
 - Electronic Documentation
- **Available eDoc Technologies**
 - Mail.dat, Mail.XML, Postal Wizard, IMsb Tool
- **Full-Service Mailing Solutions**
 - Commercial Software Vendors
 - Mail Service Providers
 - IMsb Tool
- **Getting Started**
 - BCG access
 - Obtaining a MID
- **Full-Service Benefits**
 - Per piece discounts; free address correction; ability to track and monitor service; elimination of permit fees; use of one permit across all mailing locations, ("Mail Anywhere")

Agenda

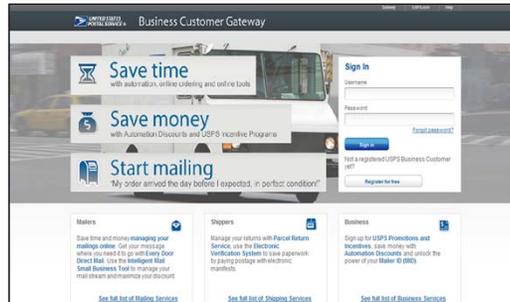
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Now that we've discussed the Full-Service Mailing Solutions for customers, let's talk briefly about how to get started with preparing Full-Service mailings.

What is the Business Customer Gateway (BCG)?

The Business Customer Gateway provides a single entry point for Postal Service online business services.

- Through the BCG, mailers can
 - Obtain an account online
 - Obtain a Mailer ID for use in Intelligent Mail barcodes
 - Test eDoc submission in the TEM environment
 - Submit Full-Service eDoc files via Mail.dat, Mail.XML or Postal Wizard
 - View postage transactions and mail quality reports
 - Obtain Full-Service benefits such as access to address correction and mail tracking data



- Access to multiple services is provided through a single user name and password.

Getting Started

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The Business Customer Gateway provides a single entry point for Postal Service online business services. Users can access Full-Service Intelligent Mail services such as

- Obtain an account online
- Obtain a Mailer ID for use in Intelligent Mail barcodes
- Test eDoc submission in the TEM environment
- Submit Full-Service eDoc files via Mail.dat, Mail.XML or Postal Wizard
- View postage transactions and mail quality reports
- Obtain Full-Service benefits such as access to address correction and mail tracking data.

Access to multiple services is provided through a single user name and password.

Now let's talk briefly about how the BCG is used to obtain a MID and CRID. This topic will be discussed in more detail in the next Module of the series, Full-Service MIDs and CRIDs

New Customer: How to Obtain a Single CRID and MID

- Log on to the Business Customer Gateway to access all online services.
<https://gateway.usps.com>
- The BCG will prompt the mailer to enter name and company information, including address. This will automatically generate a CRID and one 9-digit MID. Other business locations can be defined or linked
- Upon creating a new account, the customer's MID and CRID are displayed directly on the Confirmation screen, as shown here

The image shows a sequence of two screenshots from the Business Customer Gateway (BCG) website. The top screenshot displays the main navigation menu with options like 'Save time', 'Save money', and 'Start mailing'. A red arrow points down to the second screenshot, which is the 'You're signed up!' confirmation page. This page displays the following information:

- Your Business Location:** BCGTEST1234, 475 LENFANT PLZ SW, WASHINGTON, DC 20260-0004, UNITED STATES. A red box highlights the **CRID : 94545290**.
- We have automatically assigned you a Mailer ID (MID): 900004055**. A red box highlights this information.
- A question: **Is this location a Mail Service Provider (MSP)?** with a checkbox for 'Yes'.

Getting Started

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To access the BCG, go to <https://gateway.usps.com>

The BCG will prompt the mailer to enter name and company information, including address. This will automatically generate a CRID and one 9-digit MID. Other business locations can be defined or linked.

Upon creating a new account, the customer's MID and CRID are displayed directly on the Confirmation screen, as shown here

Where Can I Find My CRID?

The CRID is displayed on the Manage Profile tab as well as the Manage Services tab

Manage Profile Screenshot:

- User: ANNA TESTER, anna.l.carroll@usps.gov (202) 268-3265
- Home Business Location: BC0TEST1234, 475 LEIFANIT PLZ SW, WASHINGTON, DC 20260-0004, UNITED STATES
- CRID: 3-8465290
- Mail Service Providers: Get MID/CRID Assignments for your Customers.

Manage Services Screenshot:

- Viewing Services for: MEL GIBSON
- THEBSA1003COMPANY, THEBSA1003ADDRESS1, THEBSA1003ADDRESS2, ST. LOUIS, MO 63108, UNITED STATES
- CRID: 3-6515589
- Business Services table:

Service	Status	ED	Action
Authenticating service (PolarOne)	Available	N/A	GET ACCESS
Customer Label Distribution System (CLDS)	Available	N/A	GET ACCESS
Customer Register Agreement (CRA)	Available	N/A	GET ACCESS
Electronic Verification Service (eVS)	Available	N/A	GET ACCESS
Every Door Direct Mail	Approved	N/A	REMOVE
HD Device	Available	N/A	GET ACCESS
Incentive Programs	Available	N/A	GET ACCESS
Intelligent Mail Small Business (IMSB) Tool	Approved	N/A	REMOVE
Manage Mailing Activity	Pending BSA ID	N/A	CANCEL
Service Enrollments	Available	N/A	MANAGE ACCESS

For existing customers who have already been assigned a CRID and want to find this number on the BCG, the CRID can be found under the Manage Account menu in two places: the Manage Profile tab or the Manage Services tab.

Linking Permits

- Before a mailer can view any mailing information on the BCG, the mailer's BCG account and mailing permit must be linked

- There are two ways to establish the link
 1. Contact the Help Desk for assistance
 2. Utilize the BCG
 - If using the BCG to link to a Permit:
 - Go to the "Manage Permits" service
 - Click on the business link and follow the directions in the Permit Validation tab

Getting Started
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Next let's talk about how we link our permit information in the BCG. Before a mailer can view any of the mailing information on the BCG, the mailer's **BCG account** must be linked to the mailer's **mailing permit**, if one exists.

There are two ways to establish this link. A new USPS customer without any historical payment transactions, should contact the Help Desk for assistance. Help Desk contact information is provided at the end of this training.

An existing USPS customer with historical payment transactions, may utilize the BCG by going to "Mailing Service" at the BCG Welcome page and then under the "Manage Permits" section, clicking "Go To Service." On the next screen, clicking the business name will display permit information. Click the "Permit Validation" tab and then enter the information required to validate your permit account: Account Number, Account Type (such as Permit Imprint), ZIP code of Post Office of Mailing, and the dollar amount of one of the last 10 transactions on the account. Then click "Validate" to link your BCG account and Mailing permit.

Existing Customer: How to Obtain an Additional MID

Welcome, Daniel

Need help getting started with Full-Service Intelligent Mail®?

Favorite Services

- DASHBOARD
- ELECTRONIC DATA EXCHANGE
- INCENTIVE PROGRAMS
- MAILER ID**
- MAILING REPORTS

UNITED STATES POSTAL SERVICE®

USPS.COM | GATEWAY | HELP | SIGN OUT

Hello, SUSAN

Home **Request MID** MID Tools Export Data

Welcome to the Mailer ID System

Mailer ID Search

Business Location: 7633816 - TEST COMPANY 94104-4144

Mailer ID:

Customer Reference:

Display Options:

- MIDs owned by my business location(s)
- MIDs delegated to my business location(s) for Data Distribution Management
- MIDs whose Data Distribution Profile delegated to other CRIDs
- All of the above

- Customers can obtain additional MIDs through the BCG “Mailer ID” portal, which can be accessed by clicking the **Mailer ID** button within the **Favorite Services** panel or from the **Mailing Services** link in the left menu
- On the **Mailer ID** page, the customer should then click the **Request MID** link and follow the instructions that appear

BCG Account
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Previously we reviewed how a new account obtains a CRID and MID. Now let’s look at how any existing customer can also obtain additional MIDs. For physical mailpiece barcodes, some customers will require more than one Mailer ID to maintain barcode uniqueness. For example, a Mail Owner may want 2 MIDs which will be used by 2 different Mail Preparers for multiple mailings. Two different and distinct MIDs are used to uniquely identify each vendor. So in this example, the existing customer would want to obtain another MID in addition to the MID that was automatically assigned.

Let’s look at how we might do this within the Welcome page on the BCG. From the Favorite Services panel, the customer can click the Mailer ID button. (Alternately, a Mailer ID link is available by clicking the Mailing Services option on the menu on the left side of the screen.) After the Mailer ID button is clicked, a new page appears titled “Welcome to the Mailer ID System”. The customer should click Request MID at the top of the page and follow the instructions that appear.

Mail Service Provider: How to Obtain an Additional MID

Mail Service Providers may request individual or bulk MIDs and/or CRIDs on behalf of a client through the BCG

Individual and bulk requests are available for the following:

- CRID
- MID
- CRID and MID

Requests for MIDs and CRIDs

Select the type of request:

- CRID**
 - Users will provide a company name and address and the system will return a CRID
 - Individual Request Bulk Request
- Mailer ID (MID)**
 - Users will provide a CRID and the system will provide the list of Mailer IDs associated with this CRID or will provide a new Mailer ID
 - Individual Request Bulk Request
- CRID and MID**
 - Users will provide a Company Name and Address, and the system will provide a CRID and a MID
 - Individual Request Bulk Request

Your Latest Requests

Request Type	Date
CRID	Jul 11 12:54:05 20100711122405:36
CRID	Jul 11 12:20:08 20100711122008:35
CRID	Jul 10 07:48:53 20100710074853:32
CRID	Jul 10 07:42:25 20100710074225:31
CRID Look-up	Jul 10 07:46:44 20100710074644:47
CRID Look-up	Jul 12 07:37:27 20100712073727:48
CRID Look-up	Jul 12 07:35:03 20100712073503:46
CRID Look-up	Jul 12 07:24:00 20100712072400:44
CRID Look-up	Jul 11 10:28:47 20100711102847:33
MID	Jul 11 01:21:41 20100711012141:42
MID	Jul 10 07:48:08 20100710074808:34
MID	Jul 10 07:47:39 20100710074739:33
MID Look-up	Jul 11 01:17:42 20100711011742:41
MID Look-up	Jul 11 01:15:24 20100711011524:40
MID Look-up	Jul 11 01:15:12 20100711011512:39
MID Look-up	Jul 11 12:19:19 20100711121919:38
MID Look-up	Jul 10 06:00:27 20100710060027:30
CRID and MID	Jul 11 12:18:13 20100711121813:37
CRID and MID	Jul 10 07:23:02 20100710072302:29
CRID and MID	Jul 10 07:08:08 20100710070808:25

Business Customer Gateway functionality also allows Mail Service Providers (MSPs) to obtain individual or bulk MIDs and/or CRIDs on behalf of their clients. Bulk requests allow a file upload to retrieve CRIDs and/or MIDs for up to 100 customers at a time. This can be done within the BCG via the “Get MID/CRID” link on the Manage Profile page.

Upon clicking this link, MSPs will be directed to the “Requests for MIDs and CRIDs” screen. On the left hand side of the page, the user can select to request individual or bulk CRIDs and MIDs on behalf of a customer. Once a selection is made, users will be given instructions for completing their request.

Agenda

- **Full-Service Requirements**
 - Intelligent Mail Barcodes
 - Electronic Documentation
- **Available eDoc Technologies**
 - Mail.dat, Mail.XML, Postal Wizard, IMsb Tool
- **Full-Service Mailing Solutions**
 - Commercial Software Vendors
 - Mail Service Providers
 - IMsb Tool
- **Getting Started**
 - BCG access
 - Obtaining a MID
- **Full-Service Benefits**
 - Per piece discounts; free address correction; ability to track and monitor service; elimination of permit fees; use of one permit across all mailing locations, (“Mail Anywhere”)

Agenda

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Now that we’ve talked about how to get started with your Business Customer Gateway account, let’s briefly review some of the key benefits of participating in Full-Service, including

- Per piece discounts
- Free address correction
- The ability to track and monitor service
- The elimination of permit fees and
- The use of one permit across all mailing locations, known as “Mail Anywhere”

Full-Service Benefits

- ✓ **Per piece discounts**
- ✓ **Free Address Correction**
 - Change of Address and Nixie
- ✓ **Track and Monitor Service**
 - Start-the-Clock on Mail Entry
 - Visibility and Tracking
- ✓ **Elimination of Permit Fees**
- ✓ **Use of One Permit Across All Mailing Locations (“Mail Anywhere”)**

Full-Service Benefits

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Mailers receive per piece discounts on their Full-Service mail.

Address correction information is available to mailers at no additional cost for Full-Service mailpieces, providing Change of Address (or COA) information and Nixie (or undeliverable-as-addressed) information.

Full-Service mailers can monitor service at no additional cost using reports that indicate when mailings are inducted into the Postal mail stream (Start-the-Clock) and provide details on the flow of their mail. Mailers can receive visibility and tracking information such as mailpiece and tray tracking data through IMb Tracing, and tray and container tracking data through the Data Distribution / Informed Visibility dashboard.

Mailers' annual permit fee will be waived when ninety percent or more of their cumulative annual mailings consist of Full-Service mail.

Finally, Full-Service mailers will also have the opportunity to use the same permit at any location via the Mail Anywhere program.

Resources for Mailers

- **RIBBS Website:** <https://ribbs.usps.gov>
 - Getting Started Page: <https://ribbs.usps.gov/gettingstarted/>
 - Business Customer Gateway Information: <https://ribbs.usps.gov/gateway/>
- **Mailpiece Design Analyst**
 - Phone: 855-593-6093
 - Email: mda@usps.gov
- ***PostalOne!* Help Desk**
 - Phone: 800-522-9085
 - Email: postalone@usps.gov

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Additional resources for mailers include those shown here:

[Note to presenter: Do not read web addresses aloud]

RIBBS Website: <https://ribbs.usps.gov>

Getting Started Page: <https://ribbs.usps.gov/gettingstarted>

Business Customer Gateway Information: <https://ribbs.usps.gov/gateway>

Mailpiece Design Analyst

Phone: 855-593-6093

Email: mda@usps.gov

PostalOne! Help Desk

Phone: 800-522-9085

Email: postalone@usps.gov

Upcoming Webinars

The United States Postal Service is offering a series of webinars designed to assist Mail Owners and Mail Preparers in moving to Full-Service. The webinars will be offered thru March 2014. Webinar information is posted on the RIBBS website at : <https://ribbs.usps.gov/index.cfm?page=intellmailpresentations>

Topic	Dates	Description
<i>Full-Service Open Line Calls Ongoing</i>	<ul style="list-style-type: none"> First Wednesday of each month 2:00-3:00 pm EDT 	USPS representatives will be online to answer any questions related to Full-Service Intelligent Mail. Log on at https://uspsmeetings.webex.com/uspsmeetings/j.php?ED=235186642&UID=0&RT=MIMxMQ%3D%3D . For audio only (855) 860-7461 use conference ID: 747 493 349
<i>Getting Started with Full-Service</i>	<ul style="list-style-type: none"> March 6, 2014, 3:30 pm EDT 	To assist customers in transitioning to Full-Service Intelligent Mail, this course provides an overview of Full-Service. Topics include the requirements for Full-Service Intelligent Mail; the technologies available to submit mailing information electronically; software solutions available to help make the transition; tips on how to sign up, get an account, and acquire a Mailer ID; and the benefits of Full-Service.
<i>Full-Service MIDs and CRIDs</i>	<ul style="list-style-type: none"> March 13, 2014, 3:30 pm EDT 	This webinar will focus on Customer Registration IDs (CRIDs) and Mailer IDs (MIDs) as they are used in Full-Service. Topics include the multiple ways for Mail Owners and Mail Preparers to obtain MIDs and CRIDs and how MIDs and CRIDs are used in the Intelligent Mail barcode, in electronic mailing information and for receipt of Full-Service data.
<i>The Business Customer Gateway</i>	<ul style="list-style-type: none"> March 20, 2014, 3:30 pm EDT 	The Business Customer Gateway provides a single entry point for USPS online business services. This webinar will highlight those features of the newly designed Business Customer Gateway that are especially useful to Full-Service mailers. These features include a new simplified registration process, the ability to request MIDS, links to submit electronic documentation, and access to reports providing feedback on mailings.
<i>Full-Service Feedback</i>	<ul style="list-style-type: none"> March 27, 2014, 3:30 pm EDT 	Full-Service Feedback is available to all mailers preparing and presenting Full-Service mail. The Postal Service conducts in-depth analysis of Full-Service electronic documentation data and presents the results through reports such as the Mailer Scorecard. Learn how to use these reports to measure the quality of your Full-Service mailings.

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The United States Postal Service is offering a series of webinars designed to assist Mail Owners and Mail Preparers in moving to Full-Service. The webinars will be offered through March 2014. A few of the dates are listed here. Webinar information is posted on the RIBBS website at the address shown here: [**Note to Presenter:** Do not read web address aloud] <https://ribbs.usps.gov/index.cfm?page=intellmailpresentations>

A Full-Service Open-Line call is scheduled for the first Wednesday of each month, 2:00 PM to 3:00 PM Eastern Time. USPS representatives will be online to answer any questions related to Full-Service Intelligent Mail. Phone in at 1-855-8607461 or log on at the web address shown here: [**Note to Presenter:** Do not read web address aloud] <https://uspsmeetings.webex.com/uspsmeetings/j.php?ED=229251247&UID=3920958&RT=MIMxMQ%3D%3D>

The first webinar in the series is on Getting Started with Full-Service. To assist customers in transitioning to Full-Service Intelligent Mail, this course provides an overview of Full-Service. Topics include the requirements for Full-Service Intelligent Mail; the technologies available to submit mailing information electronically; software solutions available to help make the transition; tips on how to sign up, get an account, and acquire a Mailer ID; and the benefits of Full-Service.

The next webinar in the series is titled Full-Service MIDs and CRIDs. This webinar will focus on Customer Registration IDs (CRIDs) and Mailer IDs (MIDs) as they are used in Full-Service. Topics include the multiple ways for Mail Owners and Mail Preparers to obtain MIDs and CRIDs and how MIDs and CRIDs are used in the Intelligent Mail barcode, in electronic mailing information and for receipt of Full-Service data.

A third webinar is on The Business Customer Gateway, which provides a single entry point for USPS online business services. This webinar will highlight those features of the newly designed Business Customer Gateway that are especially useful to Full-Service mailers. These features include a new simplified registration process, the ability to request MIDS, links to submit electronic documentation, and access to reports providing feedback on mailings.

The final webinar in this series deals with Full-Service Feedback, which is available to all mailers preparing and presenting Full-Service mail. The Postal Service conducts in-depth analysis of Full-Service electronic documentation data and presents the results through reports such as the Mailer Scorecard. Learn how to use these reports to measure the quality of your Full-Service mailings.



We'll now take questions.