



# **Business Customer Gateway Release Notes 4.4**

**Version 3.0**

**June 5, 2013**

# Business Customer Gateway

## Release Notes

The Business Customer Gateway (BCG) Release 4.4 will be deployed June 9, 2013. This release introduces a new design that provides a new look and feel, provides new features and functionality and simplifies the registration process. These Release Notes provide the contents of this release and its effect on the following areas based on changes identified during the test stage of the development cycle.

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# 1. Internal and External Customers

The Business Customer Gateway (BCG) will be deployed June 9, 2013. This release introduces new functionality and provides a new look and feel for the site. The following items are included in BCG Release 4.4 and are of interest to internal and external users of the system.

## 1.1 Enhanced Navigation

Redesigned application flows and layouts provide enhanced navigation, optimize usability and give the site a new look and feel. This includes the following:

- New style templates
- Consolidation of screens
- User Inbox for important messages
- Ability to identify services as “favorites” which are displayed in a separate, easy to access, area on the homepage
- Support page for additional information
- Tooltips that additional information about a topic

## 1.2 Public (Landing) Page

A new BCG Public landing page; where users are able to get information on USPS products and services as well as register to use these services. This page includes:

- Promotional area for what is new in products and services.
- New layout for BCG Service offerings; now grouped by Mailers, Shippers, and Business sections. Users will be able to view a brief description of a service. (See the Appendix A for additional information regarding the services available). Prior to this release, a full listing of services on the BCG was unavailable on the public landing page.
- New and updated Service Information pages for all services. Users will be able to access additional information on a particular service and or product before registering.

## 1.3 Registration Process

The registration process has been streamlined, making it easier for a customer to register and do business through the BCG.

- When creating an account, users will have the ability to enter their Customer Registration ID (CRID); if known, or their business name and address. Before, the business name and address was the only option. The option of using the CRID allows users that want to get access to an existing business account the ability to identify that specific account. This ensures users get access to the correct account.

- Unique Identifiers (i.e. CRID and 9-digit Mailer ID) are automatically assigned during the registration process for new accounts and viewable throughout the BCG. Previously, only a CRID was assigned and displayed in company profile. Since a Mailer ID (MID) is needed for many of the mailing and shipping service processes, a 9-digit MID is now assigned automatically at registration. Previously customers had to request a MID. Customers still have the option to request additional MIDs, if needed, through their Mailer ID service.
- Users who register at a new location will automatically get access to Core Services listed below. Prior to the release, users had to request access for each service separately.
  - Core Services
    - Manage Mailing Activity
    - Mailer ID
    - Customer Label Distribution System (CLDS)
    - Intelligent Mail for Small Business (IMsb) Tool
    - Every Door Direct Mail
    - Schedule a Mailing Appointment (FAST)
    - Customer Supplier Agreements (CSAs)
    - Incentive Programs
    - Online Enrollment
    - Electronic Verification System (eVS)
    - Scan Based Payment (SBP)
    - Parcel Return Service (PRS)
    - USPS Package Intercept

**Note:** Existing users who are the only user at a location will have their account upgraded with any core services they do not currently have access to upon logging into the new app for the first time. Pre-Existing multiple users at a location will be directed to the homepage where they can access and request additional services.

- Users also get automatic access to the following services that do not require a BSA:
  - Customer Label Distribution System
  - Every Door Direct Mail
  - Automated Business Reply Mail
  - Intelligent Mail for Small Business
- Adding an additional business location is now easily accessible from multiple places throughout the application. When adding a location, the same Core services are assigned for a user at that location. Previously, the user was confined to adding a location when requesting access to a single service. With the new BCG, the service does not have to be requested and approved before adding a location.
- The location service administrator process has been streamlined. When registering as a single user, the first person that signs-up for a location for a service will automatically become the Business Service Administrator (BSA) for all core services. Previously, users were prompted to be the BSA for each service individually.
- A new list of approved business services for users is now available in their profile. The list includes an indicator next to those services for which the user is the Business Service Administrator (BSA).
- Users can identify a business location as a Mail Services Provider (MSP) by selecting the MSP checkbox. This is new functionality to enable access to tools for Service Providers to manage certain account activity for their customers. (See section 1.12 for additional information on MSPs).

## 1.4 Pre-Existing User Log-In Process

Users who had previously created an account in the BCG will not need to register again. Existing users will maintain their user name, password, access and services (including the BSA role) in the new BCG.

To protect user information; security questions are required of all users.

- Users who created an account between April 2009 and July 2011 have one security question and will be prompted to provide a 2nd security question. (Exception: if a user logged in through USPS.com they will have already completed the second security question). Some mailers have their user login information occurring automatically on their computer during the log-in process. In order to successfully log-in, the owner of that account should login directly and complete a new secret question.

Some users with accounts prior to April 2009 will be asked to complete their first security question upon their first time log-in to the BCG. Upon their second log-in, they will be asked to complete a second security question. This applies to users that did not complete security questions when the Gateway website initially deployed.

## 1.5 Homepage

A user signed-in to the BCG will see a new page that allows them to easily navigate to Business Services and tools. The signed-in page has also been streamlined to group services into individual Service tabs for customers shipping packages and mailing letters and flats, as well as other varieties of services. The user can access these services and additional tools from one page.

- Inbox
- Mailing Services
- Shipping Services
- Other Services
- Support
- Manage Account

In addition, users will see new functionality:

- Notifications and Alerts box
  - Appears when there are important announcements.
- Message box
  - Provides information on pending access requests.
- Favorites Area
  - The user will have the capability to bookmark the business services they utilize the most. When a user first logs into the new BCG, the Favorite Services will default to preset services. Users will also have the capability to edit their Favorites.

## 1.6 Inbox

The Inbox tab will give the BSA the ability to view and approve or deny any requests for access to services in a single request. Previously, the inbox functionality provided individual request and the BSA had to approve one service at a time.

## 1.7 Business Services

The process for requesting and receiving access to business services has been streamlined. The user can request access to services in bulk during initial enrollment, or individually using the service tabs. Users will have the capability to view, request, and receive access to services from one screen by each of the Business Service Tabs listed below.

- Mailing Services
- Shipping Services
- Other Services

Users will also see a visual representation of the services they currently have, services pending, and other services available. Prior to this release, users could not view the status of their services nor request access from the same page. The user would have to go to their profile to view the list of services for which they had access.

Additional information in regards to what services are grouped into the Mailing, Shipping, and Other Services tabs is available in Appendix A.

## 1.8 Support Page

A new Support Page is available and provides online and live service information. The support page can be accessed by the 'Help' link. Before signing into the BCG, the user will be able to access the Support Page from any Service Page and from the 'Help Link' located on the toolbar. Once signed in, the user will be able to access the Support page from the Support Tab.

Prior to the release, support links were located in multiple locations. Now support information is consolidated onto one page and accessible throughout the BCG.

## 1.9 Manage Account

Enhancements to Manage Account allows users to quickly view and modify various aspects of their account, including the features detailed below. Prior to the release, this information was displayed on one page using multiple tables. The new BCG has streamlined this process by separating these tools onto separate pages.

- Manage Profile
  - The user can easily edit their information, view terms & conditions, and add a new business location.
- Manage Preferences
  - The user now has the option to select up to seven of their services to appear in their Favorite Service Panel. This is a new, quick access, feature.
- Manage Services
  - Users can view the status of a service, request access, or remove an approved service on the new Manage Services page. Approved services may be access via this page by clicking the service name. In addition, the user can download their service data and review service request history.

## 1.10 Multiple Locations

Users that utilize services for multiple business locations have an additional tab labeled 'Manage Locations' located under Manage Account. Manage Locations has been redesigned to allow the user to easily navigate throughout the page. Users will be able to:

- Add a new business location. Previously, the user was confined to adding a location when a single service was being requested. With the new BCG, the service does not have to be requested and approved before adding a location.
- View a location
  - New functionality allows users to view a location with a dropdown feature.
- Edit a location – Note: Only the BSA can edit locations except the home location.
- Expanded location search functionality
  - New functionality gives users the capability to search using any character.
- Sort by MSP indicator
  - New functionality enables the user to sort by MSP. Previously the user could only sort by Business Name and Address, City/State, and CRID.

Users with multiple business locations will also be able to select a location from a dropdown menu to view functionality from the Mailing, Shipping, and Other Services pages. This functionality was not available previously.

There is additional new functionality under 'Manage Services'. The user can toggle between viewing by location and service while staying on the Manage Service page. The user will be able to see the services and their status, as well as if they are the BSA or not. In addition, the user will be able to take action on a service; such as requesting access or removing a service. This functionality was not available previously.

- When viewing by location, all available BCG services will be listed with their current status for the location selected in the dropdown. When the user selects a different location from the dropdown, the table will display the services for that new location.
- When viewing by service, all available BCG locations will be listed with their current status for the service selected in the dropdown. When the user selects different services from the dropdown option, the table will display the locations for that service.

## 1.11 Multiple Users

There is new simplified functionality to allow the BSA to manage multiple users from the 'Manage User' tab available under 'Manage Account.' This tab will only appear for a BSA when there are additional users who have access to the services and locations. The BSA can filter information by the following categories:

- Location
- Service
- User
- Access Level

The BSA can also view Pending requests. This functionality was previously under the Manage Users Access.

The BSA can control the level of access for each service by a user at a specific location such as:

- Access
- BSA Delegate
- No Access
- Requested

## 1.12 Mail Service Providers

Mail Services Providers can identify themselves by selecting the MSP checkbox. The MSP question and checkbox will display under the following scenarios:

- A new user registering for the first time; that is in the BSA role.
- Adding a location, to an existing account if the user is a BSA.

The MSP question and checkbox will be available for all scenarios in July.

Note: If the MSP checkbox is marked yes, the MSP will have access to the 'Customer Validation Tool', which will allow the MSP to validate their customer information. In addition, the MSP will be able to request CRIDs and MIDs on behalf of their customers. These additional features will be available in the July release.

## Appendix A- Further Information

From the Public Landing page, users can access services grouped into Mailers, Shippers, and Business sections before registering. When accessing one of these sections, the user can view a brief description of services defined by each category.

- Mailers
  - ADVANCE
  - Automated Business Reply Mail
  - Centralized Account Processing System (CAPS)
  - Customer Label Distribution System (CLDS)
  - Customer Supplier Agreements (CSAs)
  - ePubwatch
  - Every Door Direct Mail (EDDM)
  - Incentive Programs
  - Intelligent Mail Small Business (IMsb) Tool
  - Mailer ID
  - Manage Mailing Activity
  - Product Performance Reports
  - Schedule a Mailing Appointment (FAST)
  
- Shippers
  - CAPS
  - Electronic Verification System (eVS)
  - Incentive Programs
  - Mailer ID
  - Manage Mailing Activity
  - Online Enrollment
  - Parcel Return Service (PRS)
  - Product Performance Reports
  - Scan Based Payment (SBP)
  - USPS Package Intercept
  
- Business
  - ADVANCE
  - Automated Business Reply Mail
  - CAPS
  - CLDS
  - CSAs
  - ePubwatch
  - EDDM
  - Incentive Programs
  - IMsb
  - Mailer ID
  - Manage Mailing Activity
  - Product Performance Reports
  - Schedule a Mailing Appointment (FAST)
  - eVS
  - Business Service Network (BSN) Services
  - Mail Transport Equipment Ordering System (MTEOR)
  - Online Enrollment
  - USPS Package Intercept
  - SBP
  - PRS

The Business Service tabs from the Sign-In homepage provides a list of services associated to each Service tab as follows.

- Mailing Services:
  - Automated Business Reply Mail
  - Balance and Fees (*PostalOne!*)
  - CLDS
  - CSAs
  - Dashboard (*PostalOne!*)
  - Electronic Data Exchange (*PostalOne!*)
  - EDDM
  - Incentive Programs
  - IMsb
  - MID
  - Mailing Reports (*PostalOne!*)
  - Manage Permits (*PostalOne!*)
  - Postal Wizard (*PostalOne!*)
  - Schedule a Mailing Appointment (FAST)
  - ePubwatch – located in ‘Other Links’ box
  - CAPS - located in ‘Other Links’ box
  - ADVANCE - located in ‘Other Links’ box
  - Tech Credit - located in ‘Other Links’ box
  
- Shipping Services:
  - Balance and Fees (*PostalOne!*)
  - Dashboard (*PostalOne!*)
  - Electronic Data Exchange (*PostalOne!*)
  - eVS
  - Incentive Programs
  - MID
  - Mailing Reports (*PostalOne!*)
  - Manager Permits (*PostalOne!*)
  - Online Enrollment
  - PRS
  - Postal Wizard (*PostalOne!*)
  - SBP
  - USPS Package Intercept
  - CAPS – located in the ‘Other Links’ box
  
- Other Services:
  - Audit Mailing Activity (*PostalOne!*)
  - Intelligent Mail Services
  - MTEOR
  - Track and Confirm
  - USPS Tracking
  - Verification Assessment Evaluator (*PostalOne!*)
  - Business Service Network(BSN) eService – located in ‘Other Links’ box