

# TT #18: Business Customer Gateway - Meeting Minutes

Friday, June 28, 2013  
12:00pm-1:00pm EST

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Agenda Items:

1. Review Minutes – June 14
2. Issues/Concerns
3. Group Input
4. Next Meeting

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## Review Minutes – June 14

## Issues/Concerns

1. The Export functionality via Manage Users page that was originally scheduled for the July release is pushed back because it is more complex than USPS first thought. USPS will continue to look into options and will keep you informed.
2. Question: As the Primary BSA I approved a user for MMA but denied all other services the user does not need. Why does the user receive BSA emails to approve services if she was denied services prior?

Answer: USPS will investigate

## USPS and Customer Input

USPS is looking into modifying/adjusting multiuser CRID for existing users. There are three options USPS is proposing:

1. USPS Question - Option 1: Do you want to request access to services via a Mailing bundle or Shipping bundle option?
  - By listing out each service under each bundle, the user can make a selection of what bundle set of services they want access to.
  - This can cut down on the services the user has access to and BSA approval.
  - The user will be prompted with a question if they are the correct person to become the BSA without automatically be assigned the BSA role.

TT18 Answer:

- We do not like grouping of services and do not want to be the BSA for all those services because we have to take extra steps to manage users.
- We would like to see an option that allows a service by service request when account is created. The user can select one single service.

- The user can still have the option to choose a bundle or group of services if they need to but they should also have the option to select individual services as well.

Option 2: Do you want to select services individually as oppose to assigning group of services immediately i.e. Manage Mailing Activity (MMA)? This will include the BSA question. If USPS went in this direction there are additional questions.

- If the user select the Bundle option, but they are not the correct person to become the BSA and the user selects 'no' for BSA, should the request be made for the user and the service go into Pending BSA status?
- Or should the system not allow the user to request a service even if they do not want to become the BSA?

TT18 Answer:

- In this scenario, maybe a message could be generated for the Manage Mailing Activity (MMA) BSA, notifying them that they have pending request and there was no BSA for that service. This would allow the MMA BSA to determine who should become the BSA or if someone inadvertently select BSA, the MMA still have the option to approve/deny the BSA for that location.
- Want the user to be able to request service individually when they register. It is fine to have bundle as options as well but the user should have the option of choosing a bundle service and or individual service.
- If a service is automatically assigned, BCG should force the user to accept or deny role that they are going to become the BSA by selecting 'yes' or 'no.'
- We do not like the system assigning/forcing someone to automatically become the BSA for any services when registering at a new location.

Option 3: When a new or existing user comes into the BCG and registers on an existing CRID, should they come into the first two screens and get additional options to make a single service selection or bundle service selection? Or should the user be directed to the home page and go through the mailing, shipping, and other pages and request services one by one?

TT18 Answer:

- Once the user is in the Mailing, Shipping or Other Services pages they should be allowed to select either a bundle of services or pick a service within a bundle/group. This would be helpful to small, medium, and large users.
- The user should be allowed to select Basic Services by bundle or pick a service within the group and the Basic services should not be in a default status.

- The user should be able to click a button to accept the BSA role
- Make sure each screen has all service options
- Add Miscellaneous Option for additional services i.e. audit mailing

Answer: USPS can look into this. If the user registers with the exact CRID, USPS would know if there are already other users at that location. The user would have to know the CRID in advance to ensure they get the exact match for that CRID.

4. USPS Question: Once a user selects their services and unchecks the BSA box or selects 'No' to becoming the BSA and clicks the request button, should USPS allow the services they want to request still go through and get put into pending BSA status until someone else comes in and take that role? OR should those services be requested for them but have them wait until a BSA has been assigned? Meaning they would have to go in at a later date and re-request access to the service.

TT18 Answer: BCG should send an email to the other BSA that user has requested service but there is no BSA. Someone should know that there is a pending service request.

5. USPS Question: What should happen if someone says 'yes' or 'no' to becoming the BSA at a new location and the user is really the only one?
- The user may not understand this statement and the BCG does not automatically make them BSA and if the user says 'no' to becoming the BSA, their request is sitting out there and there is no one else to notify.

TT18 Answer: BCG should send a message to the user that there is no BSA for this service and it will not be approved until someone accepts the BSA role for this service. The user can escalate or make another choice.

USPS Answer: USPS will look into this.

5. Mailer Question: For future consideration, can the system prompt a message to a new user asking them 'Does your company have a current association with the BCG? If the user says 'yes', they should enter the CRID of that location to ensure they get the exact match of that CRID and have some idea of what they are going to do with the company.

Would that work at the beginning level of coming into the BCG and be able to know that the company already knows the individual is signing up and has been given pre-authority by the company so that when the Primary BSA sees the name come through, somebody else already knows that customer is signing up?

6. Mailer Question: Have you decoupled the MID in your backend system from being a requirement to tie to all the other services? At one time that was a prerequisite that they had to have for shipping services before they can move forward. Has that been decoupled in your application now?

USPS Answer: For some services users still need MID others they do not. USPS will have to get the list of the requirement. From BCG side, only MID is required for Online Enrollment. When BCG goes to other systems they are checking to see if user has other services i.e. Imsb tool might need MID to get in. Not completely decoupled yet.

7. Mailer Question: So then it would be hard to move from Basic service because it would not allow other services they request to be properly applied or work, right?

USPS Answer: Yes that is another reason why those are part of the basic service because we can resolve the contingent service situations on our own. If we just give you everything, the user does not have any contingent issues. They will have access to all those services. Seamless on user end because they do not have to know all those relationships.

8. USPS Question: How do you want the BSA information displayed for pending requests?

TT18 Answer: The BSA information has always been available. The name should be a default and the BSA should be able to choose what additional contact information to display, email address and or phone number.

9. USPS: The Manage Users export feature will not be available until a later release. The BCG team is working with the developers on this. It is a complex situation in the way the data is structured and how it is pulled from customer registration. We could run into performance issue in getting the data back to you. We are looking at a better way to implement this so that you do not run into any issues.

TT18 Answer: Please do not let this fall off the list as we really need this feature.

#### **Open Recommendations List**

1. Mailing/Shipping Service Pages
  - Not fond of this layout – Too much scrolling
  - USPS looking at making services pages collapsible. It will push the page up. Descriptions will not automatically be shown.
2. Change look of service pages. The list is too long and too much scrolling. Look into collapsing the service descriptions.
  - Possibly have a variety of views and let the user choose how they want to view it i.e. MicroStrategy
3. Eliminate flashing image if it occurs on the new homepage as it does on the existing homepage.
4. Choose a location before opening the Dashboard to speed up the response.
5. Allow BSA the ability to remove a user from the list all together via Manage Users.
6. Would like to have an export capability from the Manager Users page that should include an email, address, phone, etc.
7. Add contact information from Manage Users page and Inbox.

8. Put some language on the screen regarding contingent service i.e. you need access to MMA and MID for Online Enrollment.
9. Have BSA preferences and default to display BSA information.
10. Capability to edit password once logged into the BCG.
11. Provide some type of automatic update and notification to the user when the access level has been changed in the Manage Users page.
12. Manage profile screen add a location recommendation from the *PostalOne!* Report subgroup
  - In the add a business location block maybe it should be two functions
    - i. create a business location and;
    - ii. add a location to your profile
13. Would like to have the capability to view the name of the BSA.
14. Large mailers would like to define what services their users should have access to or BSA role rather than having the users automatically assigned Core services.

#### **Closed Recommendations**

1. Favorites text is too small. They should be made larger or stand out more - Completed in July Release 5.0
2. Add “Gateway” in the header instead of “Home” – Completed in June Release 4.4.
  - USPS can try and add to a BNS/SRS for an upcoming PO! Release
3. Text in Black Tool Bar can be more prominent and the Header links are too small, maybe make the gray even a bit brighter than it is but like the gray bar. Completed in July Release 5.0.
4. Add ‘Click on service name for additional information’ in mailing, shipping, and business modals on public homepage. Completed in July Release 5.0.
5. Change “Welcome” to “Gateway” on tabs - users are used to that terminology – Completed in June Release 4.4.

#### **Next Meeting**

- July 19 at 12pm EST