

TT #18: Business Customer Gateway - Meeting Minutes

Friday, July 19, 2013
12:00pm-1:00pm EST

Agenda Items:

1. Review Minutes – June 28
2. Group Input
3. Additional Comments/Questions
4. Next Meeting

Review Minutes – June 28

Group Input

Based on recommendations from the last meeting, USPS made some mock-up screens on Online Enrollment, BSA question, and the BSA contact information. The group provided feedback on what mock-ups were more in line with what they would like to see.

- Online enrollment process for all user types.
 - TT18 Response: Prefer the mock-up screen that lists out the services.
 - Would like to have the 'Other' services (MID, MMA, Incentive Programs) items to check rather than the bundle option.
 - These 'Other' services should be renamed to something different such as primary or core services and should be at the top of the page.
 - Users will not need to be automatically assigned these services.
 - Mailing and Shipping Services should be unchecked by default.
 - The word 'basic' in the first radio button that reads 'I'd like be given basic USPS Business Services' should be changed to something else e.g. 'full suite of services' or 'primary services'.
 - No default on the radio buttons when choosing basic USPS Business Services or Custom selecting services.
- BSA's should be given the option to choose if they want to accept the BSA role or not on the homepage.
 - TT18 Response: Prefer the mock-up that shows the BSA description and the 'yes' or 'no' checkbox.

- If the BSA selects 'no' to becoming the BSA, there request should go into pending BSA until another user comes in and accepts the BSA role for that service.
- BSA text description should be more prominent, possible a red text so the user is aware that this section is important.
- Where to allow the BSA the option to select if they want their additional contact information displayed for users. (**Note:** This will allow users to see additional BSA contact information other than there name in the pop-up modal when a user selects 'you' or 'not you' on the BSA column of the Manage Services page. Only BSA's will see this on their profile page. This feature will not be available for general users).
 - TT18 Response: Prefer the Manage Profile page
 - There should be a checkbox for their email address and one for their phone number below the User name.
 - The checkbox should not be set to default.

✚ Additional Comments/Questions

- TT18 Question: Will there be a BSA Administrator page available so that we can control what users can and can't see?

USPS Answer: Nothing in plan now but we can explore in the future. We do have some functionality that has been proposed that would work with the BSA page as oppose to the Mailing and Shipping Service pages. Please provide your ideas to us.
- Informed Visibility Workgroup would like for the reports i.e. IMb Tracing that were accessed from the BCG previously to be much easier to get to. Right now, the user has to go through several steps to access them.
 - USPS is looking into this.
- TT18 would like to meet periodically to discuss new functionality and enhancements for a future release, including the updates and changes that were discussed from today's meeting and what the final results will be.
- TT18 would like a list of ideas/improvements that are documented by USPS so that feedback can be given and perhaps prioritized by the group.
 - USPS has a forecast of features that can be shared with the group that outlines what is on the list.
- TT18 would like the new enrollment process for multiple users to be implemented in a future release.
 - USPS looking to get this done later this year but it depends on the complexity of developing the logic.

✚ Next Meeting

- TBD

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.