Business Customer Gateway

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All business customers, large or small, use the Gateway as a starting point to USPS services

- Creates a single, unified landing point for customers to access all of the Postal Service's online business offerings

- A single user name & password give access to multiple services

Customers will go through the Gateway to perform critical tasks such as:

- View company information

- Manage Mailer IDs

- Manage electronic data exchange

- Schedule mailing appointments

- View postage statements and transactions
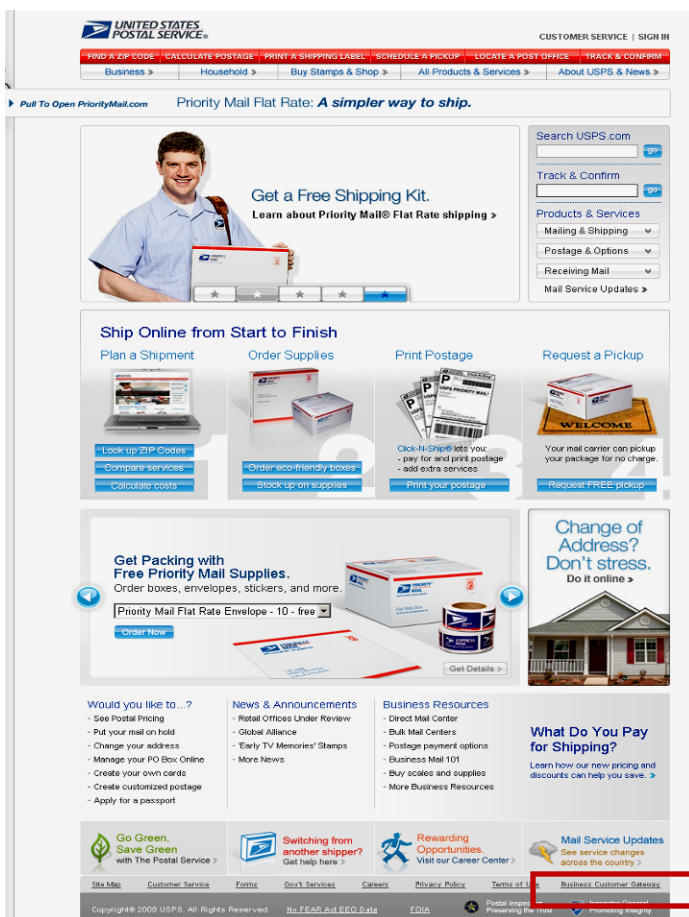
- Track and confirm

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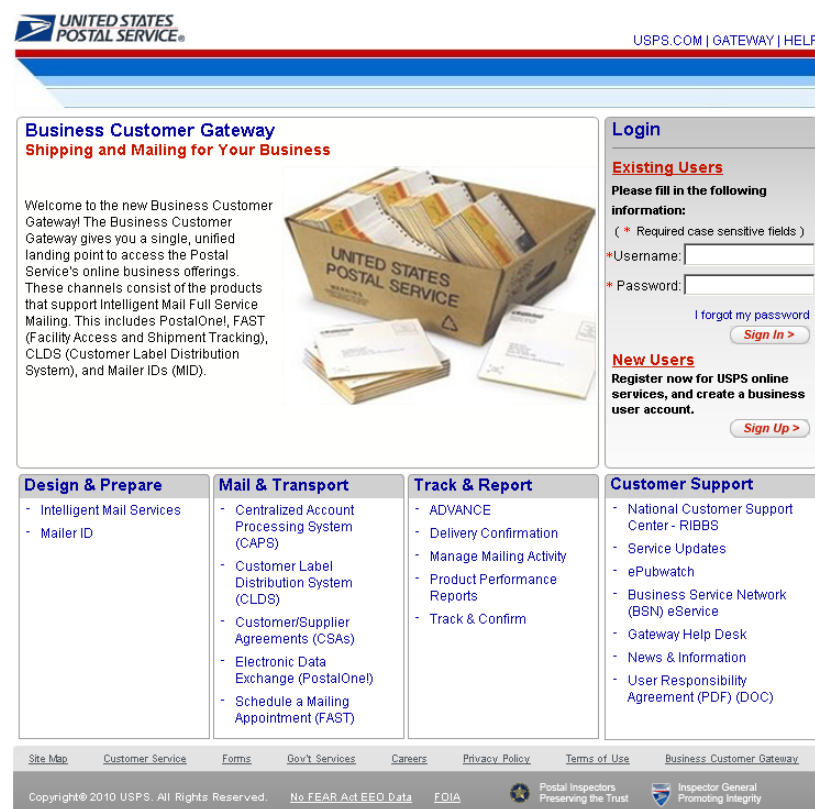# Customers access the Business Customer Gateway from USPS.com

https://gateway.usps.com/bcg/login.htm

http://www.usps.com

The Gateway landing page provides links to more information and the ability to sign in or register for access

- Information on the services available through Gateway links
- General information links
- Customer Support links
- Login for existing users
- New Users Sign Up

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Existing users log in and new users create their accounts from the Gateway landing page

- New users request access to services and business locations when signing up:
    - Services (system functionality such as *PostalOne!)*
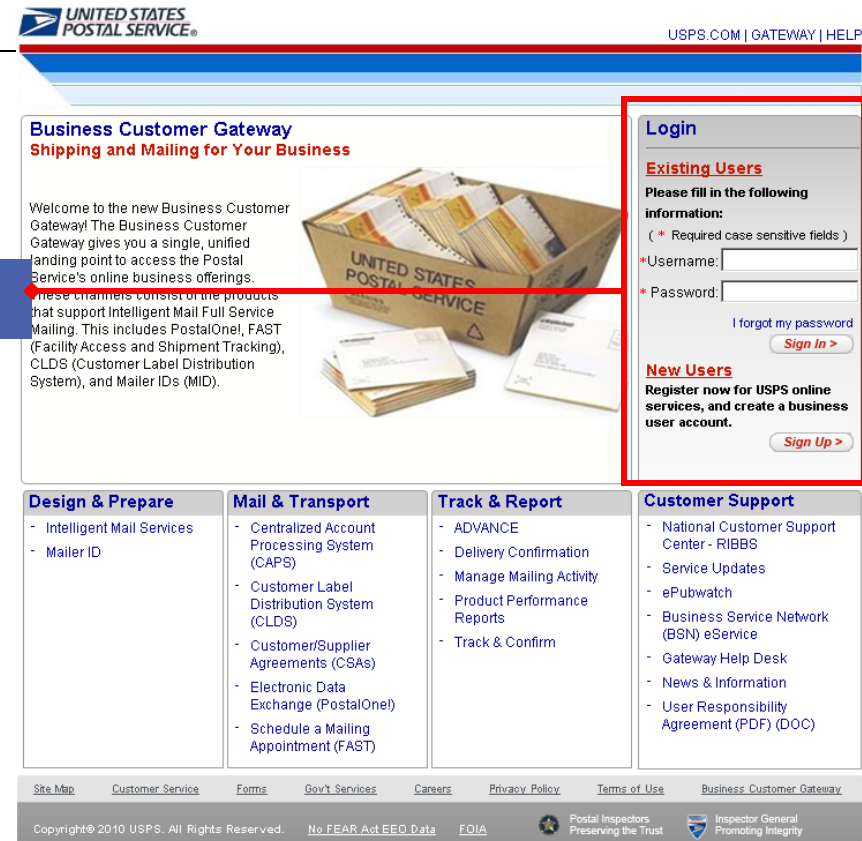   - Business locations (company name at an address)
- Services require a Business Service Administrator (BSA)
    - BSA is the key contact for a Business Location for the management of the selected Service
        - Approves and deactivates all user requests for Services at the business location
        - Establishes the company locations where permits and Mailer IDs will be linked
    - The first user requesting a service for a business location will be prompted to assume the BSA role

Step 1 for new user:
Sign up at the Gateway landing page

Step 2. New user creates Username and Password

Step 3. New user selects business account

Step 4. New user enters company information

Note: All Business locations receive a Customer Registration ID (CRID). The CRID is used to link all users and company information.

Step 5. New user reviews and confirms information	Step 6. New user reads and accepts the Privacy Act

Step 7. New user selects a business service

- A user requests a service by selecting one of the service links

- Users can add additional services and business locations later from the Gateway homepage

Step 8. New user selects the business locations to associate to the service

Step 9. New user account confirms or cancels the business service request

Some Services require a Business Service Administrator (BSA)

- The system prompts the first user to become the BSA, so the person the company wants to become BSA should register first.

- The user has the option to assume the BSA role or wait for the Service until a BSA is assigned at the business location

- The BSA agreement lists the Responsibility and Obligations and Terms & Conditions of Participation

Step 10a (BSA).
New user has the option to assume the BSA role if they are the first to apply for the Service at the selected business location

Business Service Administrator Approval

It is a requirement for this online Business Service that a Business Service Administrator (BSA) be in place to manage user access for this business location. Would you like to become the BSA and accept the responsibilities detailed below for this business location?

If you do not want to accept these responsibilities, your access request will be placed in a queue until another individual becomes the BSA.

Please review the following Terms and Conditions:

> **United States Postal Service™**
>
> Terms and Conditions
>
> Section 1 GENERAL
> Section 2 TRANSACTION TERMS
> Section 3 USPS OBLIGATIONS
> Section 4 PARTICIPANT OBLIGATIONS
> Section 5 PARTICIPANT LIABILITY
> Section 6 GENERAL TERMS AND CONDITIONS
> Section 7 PRIVACY ACT
> Section 8 USER RESONSIBILITY STATEMENT
>
> This document describes the terms and conditions pertaining to your participation in and use of United States Postal Service™ (hereinafter Postal Service™ or USPS™) computer systems as described and authorized by the USPS™. These terms and conditions are subordinate to, and do not supercede, any provisions of the Domestic Mail Manual (DMM™) or any other regulations

☐ I certify that I have read and understand the foregoing.

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

	Business Name	CRID	Address	City	State	Zip
☐	GATEWAY NEWS	4431205	900 N STEWART ST	ARLINGTON	VA	22203-4101
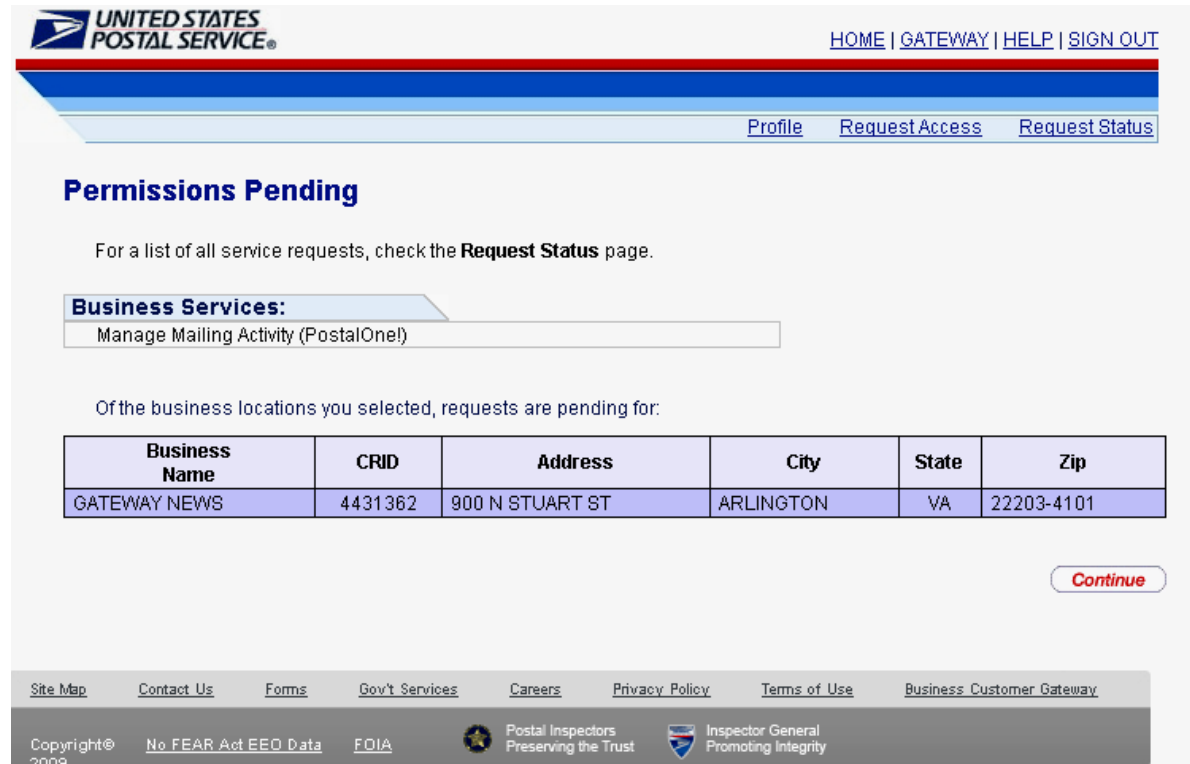
No Thanks   Print   Yes

Step 10 (non-BSA)
Access Pending

- If Business Service Administrator already exists, the user receives a permissions pending notification

Gateway – Service Requests

- The system auto generates Request status emails

- User receives email confirmation of Business Service Administrator status for the Service at the requested location(s)

- Non-Business Service Administrator users receive an email notification of the status of the request

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Profile Management Functionality

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

Profile Management

- Gateway Profile links allow current users self-service

- view their profile

- edit profile info for affiliate location(s)

- request access to additional business services and business locations

- monitor a request status for approval

CRID

- The User Profile displays the user's Business locations including the CRIDs (Customer Registration IDs) associated to those locations.

- The Profile also displays the Services a user has and locations for which that Service has been approved.

Note: The option for a user to remove Services is available through the User Profile.

Customer Registration ID (CRID)

- Unique identifier created by the system to identify the USPS Customers at a business location address
  - Or each unique combination of Company Name and physical address
- Connects a company information across all USPS applications
- Associates every Permit Number and Mailer ID issued (there may be multiple Permit Numbers or MIDs associated to a single CRID)
- When setting up business profiles, it's critical that users enter the business name and address consistently for correct affiliation
- A different CRID could be inadvertently assigned and the user will not be linked to the business entity for the desired location.

Request Access

Users can request access to additional services and business locations via the Request access link

Note: Users also have the option of having their BSAs assign them any additional Services and locations.

Request Access

When requesting additional business locations, users may enter the CRID of the business rather than the name and address

When setting up business profiles, it's critical that users enter the business name and address consistently for correct affiliation

- A different CRID could be inadvertently assigned and the user will not be linked to the business entity for the desired location.

- Business Service Administrators need to ensure their company users apply with the same business information that the initialing user entered for the desired location.

- To ensure correct Business Location / CRID assignment, users may enter a business location by CRID when adding a new business location for a Service

Request Access

- Confirm location entry

Request Access

- Once all locations are added, select locations by check box and select Next

Request Access

- Confirm the Service and locations

Request Status

- Allows users to view status of their service requests.

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A Business Service is functionality in a USPS application

- Grouped under four business areas on the Gateway Landing page: Accounts, Design and Prepare, Mail & Transport and Track & Report

- Service groups such as Manage Mailing Activity display components on the User homepage

- If Service is not enabled, the system prompts user to add the Service

Business Service	Service Description
Manage Mailing Activity (*PostalOne!*)	Manage Mailing Activity is comprised of *PostalOne!* functionality that supports electronic submission of mailings (including a Test Environment for Mailers (TEM) for Mail.dat, Mail.XML™ and the Postal Wizard) and provides mailing activity information
Manage Mailing Activity Sub-Services	**Sub-Service Description**
Summary	Provides overview of recent transaction activity
Balance and Fees	Provides permit owners the balance and fees due for permit and publication accounts
Postal Wizard	Provides mailers an online avenue to submit an electronic postage statement
Electronic Data Exchange	Provides users access to TEM to submit Mail.dat 09-1 and 08-2 files and Mail.XML for test purposes, and Production environment to submit Mail.dat 09-1 and 08-2 files
Mailing Reports	Provides users mailing transactions including postage statement detail, Electronic Mail Improvement reports, Mail Quality reports, Issue Level Postage Statements.
Dashboard	Provides users the status of all electronically submitted mailings.
Manage Permits	Provides users a view of all permits linked to their account. BSAs have the capability to link additional permits to their business locations.

Business Service	Service Description
Mailer ID	Mailer Id supports all functionality associated with the management of Mailer IDs, including applying for a MID and managing an MID profile.

Mailer ID Sub-Services	Sub-Service Description
Mailer ID Summary	Provides summary of all Mailer IDs that are linked to a business location
Request a Mailer ID	Provides the capability to request a Mailer ID. System does a volume check to determine qualification.
Manage Mailer ID Profile	Provides user capability to manage data distribution for Full Service ACS and Start-The-Clock/Container Visibility information.
Address Book	Provides users capability to store data distribution recipient candidates for profile management.
Delegate Mailer ID	Provides users the capability to delegate the management of a Mailer ID to another party. This enables the other party to manage data distribution options.

Business Service	Service Description
Schedule a Mailing Appointment (Fast)	FAST provides electronic drop shipment and Origin Entry appointment scheduling.
Customer Supplier Agreements (CSA)	Customer Supplier Agreements provide, for a commercial mailer, the origin-entry preparation requirements and the acceptance window times necessary for mail to be considered entered into the postal network on "Start-the-clock Day Zero" (Day-0)
Customer Label Distribution System (CLDS)	The Customer Label Distribution System (CLDS) provides an online alternative to the existing manual label order process.
Audit Mailing Activities (*PostalOne!*)	Provides users with read-only access to the Mailing Reports included in the Manage Mailing Activity service.
Manage Electronic Verification Activity (e-VS)	The Electronic Verification System (e-VS), allows high-volume package mailers and package consolidators to document and pay postage, including special service fees, using electronic manifest files.
Manage Electronic Return Activity (PRS)	Parcel Return Service (PRS) is a workshare discount program that offers an easy and convenient way for customers of retail companies to return parcels.

Navigating the Gateway

- The USPS.COM link on the Gateway will return a user to USPS home page.

- The GATEWAY link returns a user to the Gateway Signed In page.

- The HELP link takes a user to the USPS.com Customer Service page.

- The SIGN OUT link returns a user to the Gateway Sign In page.

Navigating the Gateway

- Until users are approved for a Service, access and functionality will not be enabled

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Manage Permits

Verify correct permits are linked to the desired business location CRID

Users may view linked permits.
BSAs can link additional permits under Manage Permits.

Manage Permits

Manage Permits – Permit Profile

Users may view linked permits for a business location CRID under the Permit Profile tab

Associated Business Entities > Business Entity Information

Business Entity Information

View and manage business entity profile information.

Name:	GATEWAY NEWS
CRID:	4431205
Corporate:	N
Address:	900 N STEWART ST
City:	ARLINGTON
State:	VA
ZIP Code:	22203-4101
Mail Facility ID:	22203-4101
Discounts and Rebates:	☐
eVS Participant:	☐
PRS Participant:	☐
Web Service Enabled:	☐

| Associated Business Entities | **Permit Profile** | Permit Validation | Contact Information | Manage Additional Info |

Permit Search Form

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

Permit No:	is ▾	
Permit Type:		▾
Permit City:	is ▾	
State:		▾
Permit ZIP:		
		Search

All Permits Linked to the selected Business Entity

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

Extend Balance and Fees	Permit No	Permit Type	PO of Mailing	Owner Name	Address	Permit Status	Finance No
☐	223	MT	Richland Center, WI. 53581	GATEWAY NEWS	S68W29189 S RIDGE PASS,MUKWONAGO,WI,53149	ACTIVE	567030
☐	4124	PE	Richland Center, WI. 53581	GATEWAY NEWS	S68W29189 S RIDGE PASS,MUKWONAGO,WI,53149	ACTIVE	567030
☐	223	PI	Richland Center, WI. 53581	GATEWAY NEWS	S68W29189 S RIDGE PASS,MUKWONAGO,WI,53149	ACTIVE	567030

Update View Status

Manage Permits

BSAs may link additional permits

Link additional permits if necessary. If validation fails, BSA should contact the Help Desk.

| Associated Business Entities | Permit Profile | **Permit Validation** | Contact Information | Manage Additional Info |

Permit Validation

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

*Required

*Account Number	
*Account Type:	(Please Select)
*ZIP Code:	
*Amount From Any Of Last 10 Transactions:	
	Validate

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Link provides access to detailed information on Intelligent Mail Services

The Mailer ID System is designed for Mailers to manage assignment and data distribution for their Mailer IDs (MID)

- The Mailer ID is a part of Intelligent Mail barcodes that is used to identify Mail Owners and/or Mailing Agents. The IDs are assigned by the USPS to each Mail Owner and/or Mailing Agent or other service providers that request them.

Acquire Mailer IDs

- Obtain access to the Mailer ID service
- Review Mailer ID Summary
  - Summary displays all Mailer IDs that are linked to a business location
  - If company has Mailer IDs which do not display in the Summary, contact the Help Desk to have them linked to the correct location
- Request a Mailer ID
  - Customers may request a 6 or 9-digit Mailer ID online
  - If Mailer ID is not available through the online application, customers may contact the Help Desk
- Manage Mailer ID Profile
  - Mailer ID profile needed if Full Service data distribution is desired

Access The Mailer ID System Acquire Mailer IDs

Step 1. User requests Mailer ID service if they do not already have access.

Step 2. User accesses Mailer ID system.

Mailer ID Summary Acquire Mailer IDs

Step 1. MID Summary page will display all Mailer ID that are associated to the selected business location.

Step 2. If there is a Mailer ID that a business location has that is not displayed contact the Help Desk.

Step 3. To request a new Mailer ID select Request a MID.

Request a Mailer ID
Acquire Mailer IDs

Step 4. System will display the number of MIDs that are available for the business location.

Step 5. If the type of MID wanted is not available, contact the Help Desk for assistance.

Step 6. Select type of MID, enter the number of MIDs requesting and click Request MIDs

Insufficient Volume for 6 digit MID.

Apply For a MID

Select the locations for which you would like to apply for MID(s). You may apply for a maximum of 10 MIDs per site in one request. Please revisit this page if you would like to apply for more than 10 MIDs. Use the drop down menu to select either a 6 digit MID or a 9-digit MID. If you will be mailing Flats using your new MID prior to June 8 and intend to request ACS, please contact the ACS Help Desk at acs@usps.gov for additional instructions.

MIDs associated with Package Services (both eVS and non-eVS) are not issued through this system. If you plan to use either of those services and require a MID, please contact the help desk at 1-877-246-9693 option #1.

Please fill in the following information

Size / Affiliate / Quantity | 6 Digit - GATEWAY SERVICES - 0 Available
6 Digit - GATEWAY SERVICES - 0 Available
9 Digit - GATEWAY SERVICES - 12 Available

Number of MIDs Requested

< Cancel   Request MIDs >
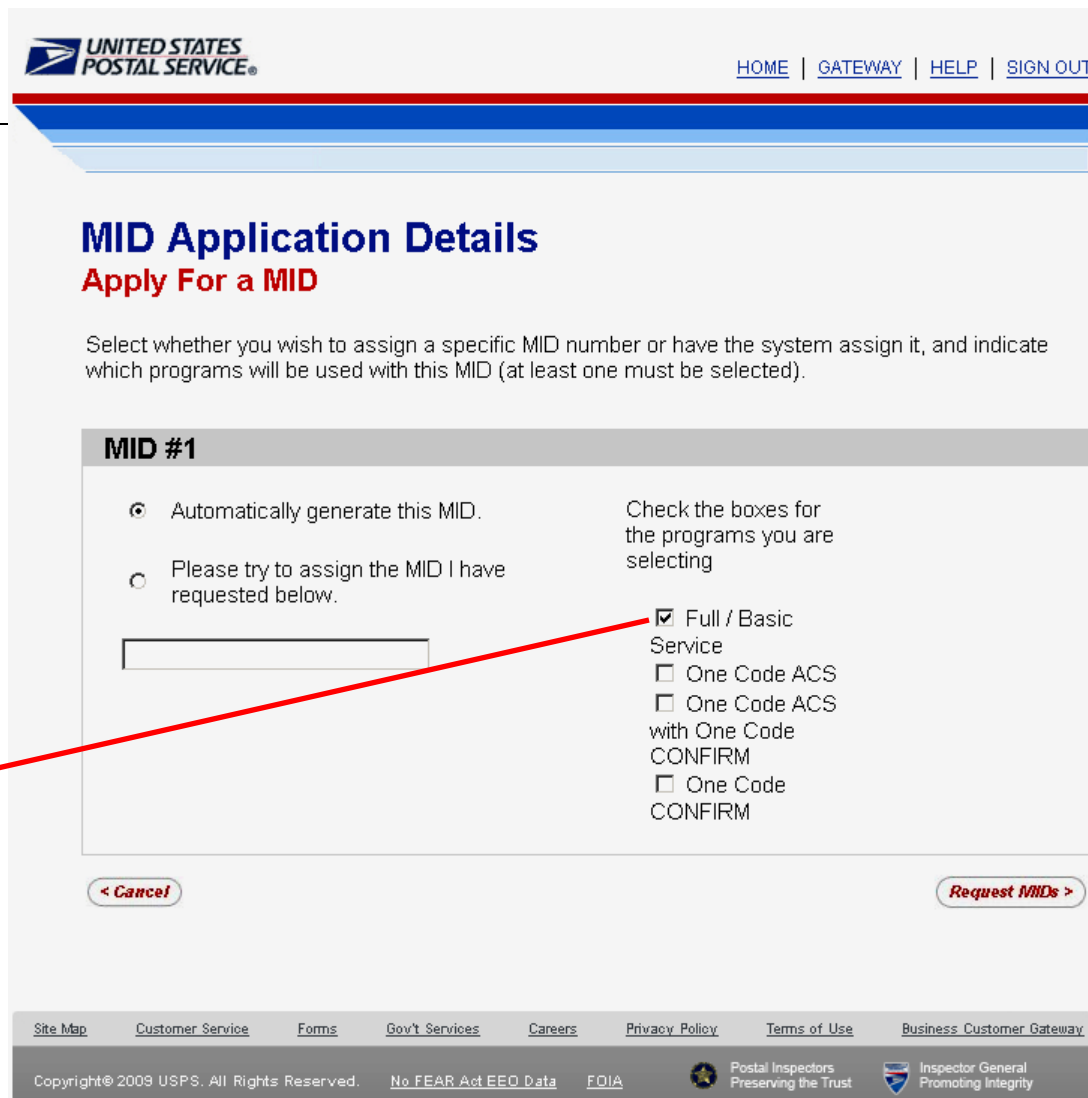
Acquire Mailer IDs: Request a Mailer ID

Step 7. Select for the system to automatically generate the MID or request a specific MID number to see if available.

Step 8. Select the program for which you are requesting to use the MID

Step 9. Select Request MIDs

Acquire Mailer IDs: Mailer ID Issued

Step 10. New MID is issued and added to the summary for the business location.

Establish Full Service Data Distribution Profiles

- Complete Address Book entries
    - Identify data recipients by entry of their Mailer IDs
- Delegate Mailer ID Management
    - MID owner has option to delegate management of their Mailer ID to another party (may revoke at any time)
    - Delegated party manages Mailer ID profile on behalf of their customer for data distribution
- Complete Profiles For Full Service ACS and/or Start-The-Clock / Container Visibility
    - Mailing Preparer: Send this data to the preparer of the mailing
    - Mailer ID (MID) Holder: Send this data to the holder of the MID on the mailpiece
    - Other - Single Recipient: Send this data to this single recipient
    - Other - Multiple Recipient: Send this data to the multiple recipient(s)

Full Service Data Distribution

Step 1. Access the Mailer ID System from the Business Customer Gateway.

Step 2 Locate the MID for which you want to create a Data Distribution Profile.

Step 3. Click Add Profile.

Data Distribution – Full Service ACS

Step 4. Select desired data distribution option:

• Mailing Preparer – sends ACS information to Preparer of mailing (Preparer identified in eDoc must match one of the recipients in the Preparer option

• Mailer ID Holder – sends ACS data to the associated company of the MID used on the mailpiece.

• Other - Single Recipient – sends ACS data to identified recipient.

• Other – Multiple Recipient – sends ACS data to identified recipients that match the cast of characters message.

Step 5. Click Save Profile.

FULL-SERVICE ACS

Choose one of the 5 options listed below to identify your data recipients(s) Select recipients by clicking inside the Search box, scrolling through the selections, and clicking on your choices. For multiple selections, hold down the **CTRL** key (the **Command** key for Macs) while clicking selections.
Note: Data recipients can only be selected from your Address Book entries. If you do not see your intended data recipient in the lists below, please add the new recipient to your Address Book.

○ **No data dissemination needed**: Do not create a profile for this data.

○ **Mailing Preparer**: Send this data to the preparer of the mailing as identified below:

Allow one or more of the following recipients to receive my data based on information contained in electronic file submissions.

999999850, CONFIRM - MID PLACEHOLDER

Recipients(s):

○ **Mailer ID (MID) Holder**: Send this data to the holder of the MID on the mailpiece.

○ **Other - Single Recipient**: Send this data to this single recipient:

Recipient: | 999999850, CONFIRM - MID PLACEHOLDER ▼ |

○ **Other - Multiple Recipient**: Send this data to the multiple recipient(s) as identified below:

999999850, CONFIRM - MID PLACEHOLDER

Recipient(s):

Hi-lighted options must have address book entries.

Data Distribution – Address Book Entry

Step 1. Select Business Location. Note: Each Business Location (CRID) has its own Address Book.

MID Summary

- Address Book: Add Data Recipients

MID Search

MID [   ]   Affiliate [5415528 - PUBLISHER 20260-0826 ▼]

(Search >) (Request a MID >)

Step 2. Click Address Book: Add Data Recipients
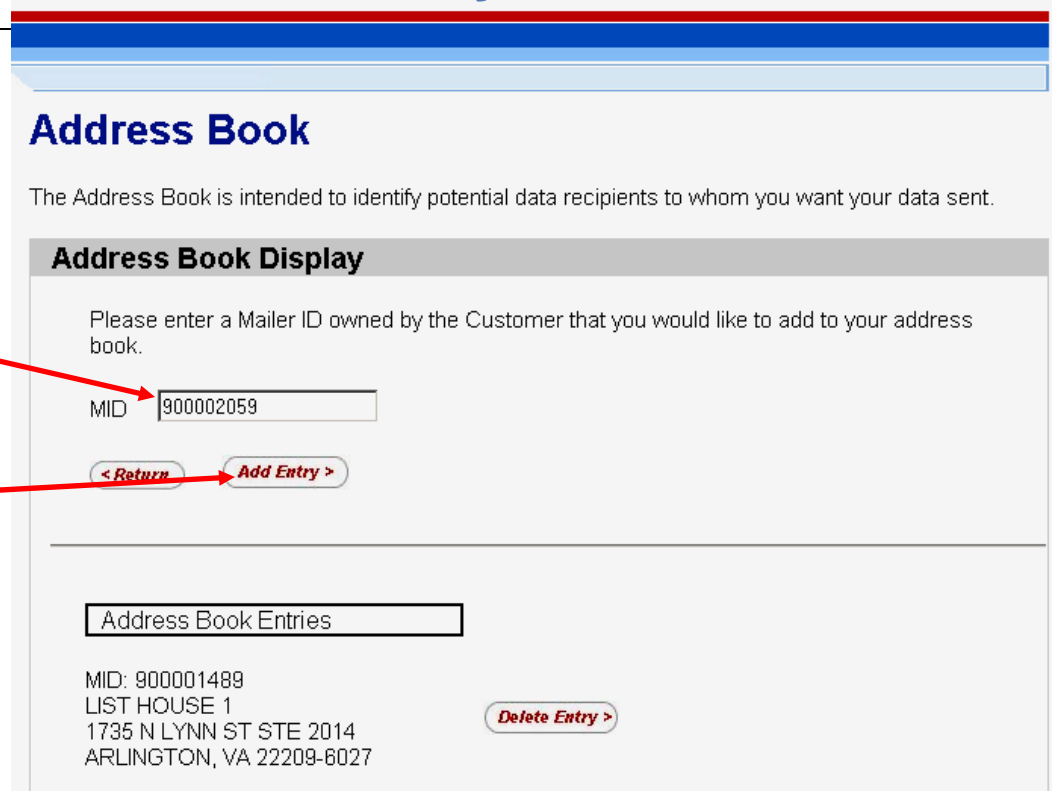
Results

MID	△▽	Affiliate	△▽	Data Profile
0165		PUBLISHER 475 LENFANT PLZ SW RM 2P826 WASHINGTON, DC 20260-0826		Edit Profile
200022		PUBLISHER 475 LENFANT PLZ SW RM 2P826 WASHINGTON, DC 20260-0826		Add Profile

Data Distribution – Address Book Entry

Step 3. Key in the MID of a possible data recipient. Note: You will need to know the MIDs of your data recipients.

Step 4. Click Add Entry

Address Book

The Address Book is intended to identify potential data recipients to whom you want your data sent.

Address Book Display

Please enter a Mailer ID owned by the Customer that you would like to add to your address book.

MID   900002059

< Return   Add Entry >

Address Book Entries

MID: 900001489
LIST HOUSE 1
1735 N LYNN ST STE 2014
ARLINGTON, VA 22209-6027

Delete Entry >

Data Distribution – Address Book Entry

Step 5. New data recipient candidate displays in Address Book and will be available for selection for all MIDs linked to the business location

Data Distribution – Full Service Start-The-Clock/Container Visibility

Steps and Profile Options are the same as Full Service ACS.

FULL-SERVICE START THE CLOCK/CONTAINER VISIBILITY

Choose one of the 5 options listed below to identify your data recipients(s) Select recipients by clicking inside the Search box, scrolling through the selections, and clicking on your choices. For multiple selections, hold down the **CTRL** key (the **Command** key for Macs) while clicking selections.
Note: Data recipients can only be selected from your Address Book entries. If you do not see your intended data recipient in the lists below, please add the new recipient to your Address Book.

○ **No data dissemination needed**: Do not create a profile for this data.

○ **Mailing Preparer**: Send this data to the preparer of the mailing as identified below:

Allow one or more of the following recipients to receive my data based on information contained in electronic file submissions.

Recipients(s): 999999850, CONFIRM - MID PLACEHOLDER

○ **Mailer ID (MID) Holder**: Send this data to the holder of the MID on the mailpiece.

○ **Other - Single Recipient**: Send this data to this single recipient:

Recipient: 999999850, CONFIRM - MID PLACEHOLDER

○ **Other - Multiple Recipient**: Send this data to the multiple recipient(s) as identified below:

Recipient(s): 999999850, CONFIRM - MID PLACEHOLDER
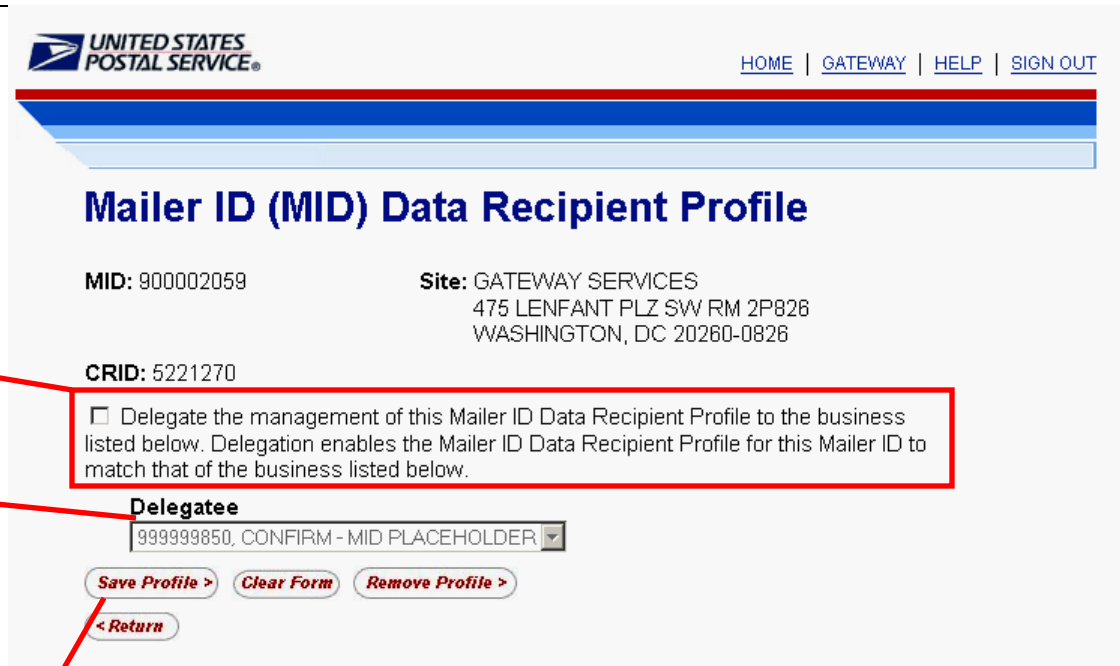
Save Profile >   Clear Form   Remove Profile >
< Return

Full Service Data Distribution – Delegate Mailer ID

Step 1. Click the box to delegate management of the data distribution for a MID to another company.

Step 2. Select the Company from the drop down box (box is populated from Address Book)

Step 3. Select Save Profile.

Mailer ID (MID) Data Recipient Profile

HOME | GATEWAY | HELP | SIGN OUT

MID: 900002059

Site: GATEWAY SERVICES
475 LENFANT PLZ SW RM 2P826
WASHINGTON, DC 20260-0826

CRID: 5221270

☐ Delegate the management of this Mailer ID Data Recipient Profile to the business listed below. Delegation enables the Mailer ID Data Recipient Profile for this Mailer ID to match that of the business listed below.

Delegatee

999999850, CONFIRM - MID PLACEHOLDER

Save Profile >   Clear Form   Remove Profile >

< Return

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Mail & Transport

- Centralized Account Processing System (CAPS)
- Customer Label Distribution System (CLDS)
- Customer/Supplier Agreements (CSAs)
- Electronic Data Exchange (PostalOne!)
- Postal Wizard (PostalOne!)
- Schedule a Mailing Appointment (FAST)

- **Centralized Account Processing System (CAPS)**
  - CAPS is an electronic postage payment system that provides business mailers a centralized, convenient, and cost-effective way to pay electronically (e.g. ACH Debit, ACH Credit and Fed wires).
- **Customer Label Distribution System (CLDS)**
  - CLDS is a suite of electronic services designed exclusively for business mailers to order and manage label orders
- **Customer/Supplier Agreements (CSAs)**
  - CSAs define mail preparation and entry for mailers and the postal plants where their mail is entered

Electronic Data Exchange

Electronic Data Exchange provides client software for Mail.dat file submission and test environment access.

Submit Electronic Documentation in Test & Production

- Obtain access to the Manage Mailing Activity service
- Obtain the Intelligent Mail Full-Service Mailer Checklist
  - Available on RIBBS at http://ribbs.usps.gov/index.cfm?page=intellmailguides
- Access Electronic Data Exchange (from the Gateway Signed-In page)
  - Download 09-1 Mail.dat Client under Test Environment for Mailers (TEM)
  - Contact Help Desk to start testing
- Move From Test To Production
  - Once a customer has successfully completed all required test scenarios, the Help Desk will notify them of the approval to submit to the production environment
  - Help Desk also notifies local Business Mail Entry

Submit Electric Documentation

User requests Manage Mailing Activity service if they do not already have access.

Obtain company CRID for electronic file submission

User obtains the Intelligent Mail Full-Service Mailer Checklist

Testing Environment for Mailers (TEM)

- Customers who wish to test Mail.dat 8-2 and 9-1 can do so using TEM

- TEM was created to provide a safe environment for testing files and to centralize testing resources
  - New customers must first set-up a business account at the Gateway user log-in
  - Existing customers user accounts will be migrated for accessing the TEM environment

Submit Electronic Documentation in Test Environment

Once a customer has successfully completed all required test scenarios, the Help Desk will notify them of the approval to submit to the production environment

User selects the version of Mail.dat they wish to test and downloads the appropriate software.

User sends the Help Desk an email to initiate testing. Help Desk link opens an email to the *PostalOne!* Help Desk.

TEM

- Customers selects the version of Mail.dat they wish to test, downloads the appropriate software and sends the Help Desk an email to initiate testing.

- Help Desk link opens an email to the PostalOne! Help Desk. Users need to complete the email with the following information:
  - Business Location Name
  - Contact Person Name
  - Contact Person eMail
  - Contact Person Phone Number
  - Data Exchange Method to test
  - The Help Desk will contact with test scenarios and timeline.

Electronic Data Exchange

Mail.dat Support for Production

09-1 Mail.dat Production	08-1 / 08-2 Mail.dat Production
Download Client Application (Windows)	Download Batch Processor
Download Client Application (Solaris)	File Validator
	File Transfer
	Metrics Search
	Metrics - File Transfer

Data exchange testing with *PostalOne!* Customer Support is required prior to activation for all electronic data exchange methods other than Postal Wizard. The *PostalOne!* system provides customers with a Test Environment for Mailers (TEM) to allow submission of jobs for validation processing in a non-production environment. This will provide mailers a way to test their file layouts and corresponding file submission/creation software prior to submitting jobs to the production application. The TEM environment will process the submitted files for the same validations that will be found in the production environment. It will also capture, log and display the error information in the same manner as the production environment for the mailers use in updating file layout and software processing.

Once you have downloaded the appropriate software (if applicable), you will initiate the test process by sending the Help Desk an email notifying them they are ready to begin testing. This email should include:
a. Company Name
b. Contact Name
c. Phone Number
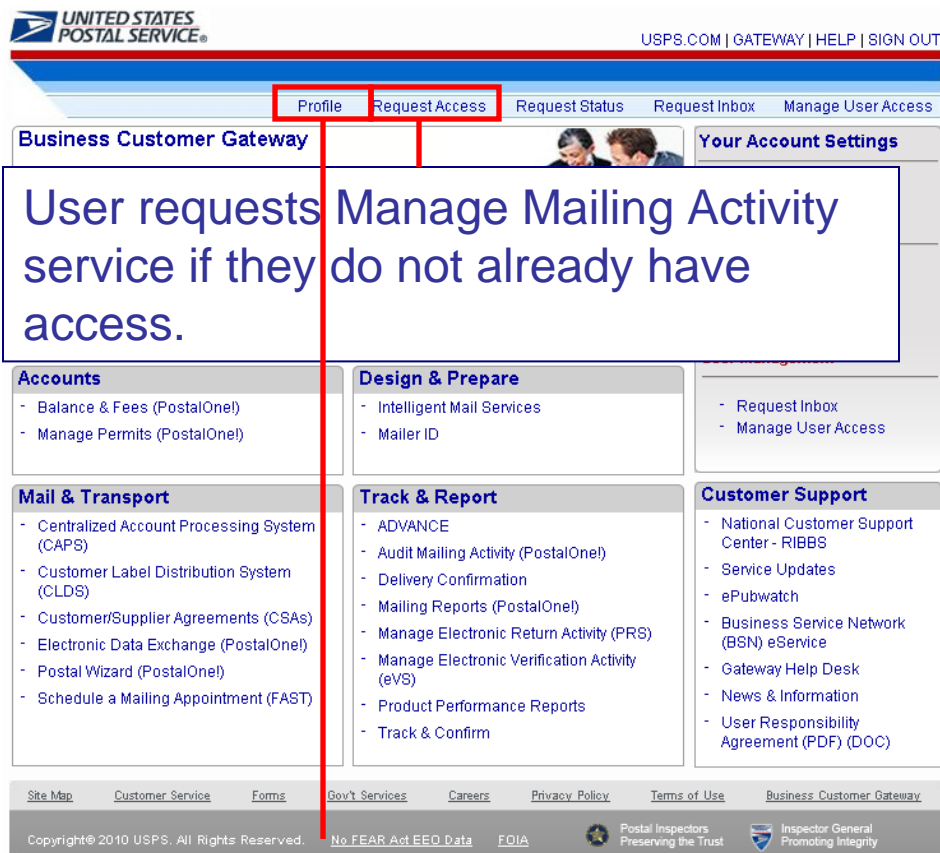d. Data Exchange Method (Mail.dat, Mail.XML, etc) and version (if applicable)

Test Environment for Mailers (TEM)

09-1 Mail.dat	08-2 Mail.dat
09-1 Mail.dat Guide	08-2 Mail.dat Guide
Download Client Application (Windows)	Download Batch Processor
Download Client Application (Solaris)	File Validator
Start Testing - Notify Help Desk	**Start Testing - Notify Help Desk**
	File Transfer
	Metrics Search

Mail.xml	Postal Wizard
Mail.xml Guide	Postal Wizard Guide
Start Testing - Notify Help Desk	**Start Testing - Notify Help Desk**
	Submit Postage Statements

Electronic Verification System (EVS)	Parcel Return Service (PRS)
EVS Guide	PRS Guide
EVS Process	PRS Process
Start Testing - Notify Help Desk	**Start Testing - Notify Help Desk**

TEM Mail.dat 9-1

- A customer will need to successfully transfer version 09-1 Mail.dat files to TEM before transferring version 09-1 Mail.dat files to the production environment

- Only the Mail.dat version 09-1 supports the Full-Service option. A Customer Registration ID (CRID) and Mailer ID (MID) are required.

- Mailers wishing to test Full-Service option capability using Mail.dat version 9-1 should follow the steps outlined in the Intelligent Mail Full-Service Mailer Checklist available on RIBBS

Mail & Transport

- Centralized Account Processing System (CAPS)
- Customer Label Distribution System (CLDS)
- Customer/Supplier Agreements (CSAs)
- Electronic Data Exchange (PostalOne!)
- Postal Wizard (PostalOne!)
- Schedule a Mailing Appointment (FAST)

- **Postal Wizard (*PostalOne!)***
  - Postal Wizard allows you to complete, print, save, and submit common forms used in the business mailing process.
- **Schedule a Mailing Appointment (FAST)**
  - Through the Facility Access and Shipment Tracking (FAST) system, mailers can provide advance notification of drop shipment mailings.

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- **ADVANCE**
  - The ADVANCE system is the in-depth method to track delivery and provide accurate information on the status of Standard Mail and Periodicals in-home delivery dates
- **Audit Mailing Activity (*PostalOne!*)**
  - The Audit Mailing Activity service allows read-only access to its users for all data associated to the permits or USPS Publication Numbers linked to the account. The user may not submit or change mailing information on this type of account
- **Delivery Confirmation**
  - Verify the date, time, ZIP Code™ of delivery, and whether the delivery was made, attempted, forwarded, or returned

View Full Service Information

- Obtain access to the Manage Mailing Activity service
  - Users must be linked to the same company location as the Mailer ID designated to receive the Full Service data
- Access Mailing Reports (from the Gateway Signed-In page)
  - From the Mailing Reports page select the Reports link under Full Service
- Start-The-Clock
  - Start-The-Clock Summary Report
- Address Correction Service (Full Service ACS)
  - Download ACS Report
  - Download Nixie Detail Report

View Full Service Information

Step 1. User requests Manage Mailing Activity service if they do not already have access.

Step 2. User accesses Mailing Reports.

View Full Service Reports

Step 3. Under Full Service, select Reports

View Full Service ACS

Step 4. Select Address
Correction Service (ACS)

View Full Service ACS

Step 5. Select ACS Report :
Two possibilities
Download ACS or download Nixie:
Select Download ACS

UNITED STATES
POSTAL SERVICE®

Home > Reports > Download ACS Report Search ❷

Download ACS Reports Search

Search By*: [Mailing Group ID ▾]   ID Number*: [VALIDIDNUMBER]

Date Range: *   From: [07/18/2009] 📅▾
              To: [09/01/2009] 📅▾   Search With*: [exact value ▾]

[Search]

Step 6. Enter search criteria:
• Mailing Group ID : a unique USPS tracking sequence number. The USPS creates this tracking ID for a Mail.dat job, for a Mail.XML mailing group, and for a Postage Statement Wizard postage statement)
• Job ID (a unique up 8 character Alpha numeric field in the Mail.dat file that is user defined and managed)

Step 7. Enter an ID Number. The user must enter a whole number a Mailing Group ID or a Job ID number

United States Postal Service

Home > Reports > Download ACS Report Search

Download ACS Reports Search

Search By*: Mailing Group ID

Date Range: *
From: 07/18/2009
To: 09/01/2009

ID Number*: VALIDIDNUMBER

Search With*: exact value

Search

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

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Step 8. Select one option from the dropdown menu. The option is a value attribute within the job ID number Extract Value, Starting Value, Ending Value Or containing Value

Step 9. Data range: The user can select the Start and End dates or enter a date using the Calendar functional icon for both the start and end dates.

Step 10. Click on Search

UNITED STATES
POSTAL SERVICE®

Home > Reports > Download ACS Report Search

Download ACS Reports Search

Search By*: Job ID

ID Number*: VALIDIDNUMBER

Date Range: * From: 07/18/2009
To: 09/01/2009

Search With*: containing value

Search

Download Data   In the format of*: Excel (XLS)

Total Count: 456. Please click "Download" to save the data or "Search" to search again.

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

Show the number of records displayed by the search

Step 11. Select criteria of search and download the data in the format of Excel (XLS) or Comma delimited (CSV)

Format can be Excel or Coma delimited (CSV)

Step 12. The Pop up box appears offering two options: Open or Save the excel file

View Financial Information

- Obtain access to the Manage Mailing Activity or Audit Mailing Activity service
  - Users must be linked to the same company location as the permits used to pay for mailings
- Access Mailing Reports (from the Gateway Signed-In page)
  - From the Mailing Reports page select View Transactions
- View Transactions
  - Report displays all transactions for permits that are linked to the locations in the User's profile for the Manage or Audit Mailing Activity Service
  - Users may access postage statement details under Transaction Type
- Mailing Summary
  - Report displays postage amounts by line item for a permit and postage statement type

View Financial Information

Step 1. User requests Manage Mailing Activity service if they do not already have access.

Step 2. User accesses Mailing Reports.

View Transactions

Step 3. Select View Transactions

UNITED STATES POSTAL SERVICE ®

Home > Mailing Reports > View Transactions

Transactions

Transactions Report

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

Search for Transactions

Location	Transaction Type	Account Type	Permit / Pub Number
All	All	All	
Customer Reference Number	Start Date	End Date	
	08/09/2009	09/12/2009	SEARCH

NOTE: These are the 10 most recent transactions from the past 6 months. They do not reflect the "Start Date" and "End Date" range.

Recent Transactions   DOWNLOAD

Permit / Pub	Location	Date	Transaction Type	Postage Statement #	Customer Reference ID	Begin Balance	Amount	End Balance	Pieces	Verifications	User	Details
PI 526		05/11/2009	3602	69378052	N/A	$495,907,500.00	-1,280,000.00	$494,627,500.00	5000000		PA	📄
PI 525		05/11/2009	3600	69378031	N/A	$498,090,000.00	-3,785,000.00	$494,305,000.00	5000000		PA	📄
PI 526		05/11/2009	3600	69378004	N/A	$500,000,000.00	-4,092,500.00	$495,907,500.00	5000000		PA	📄
PI 525		05/11/2009	3602	69377995	N/A	$500,000,000.00	-1,910,000.00	$498,090,000.00	5000000		PA	📄
PI 526		05/11/2009	Permit Deposit	N/A	N/A	$0.00	+500,000,000.00	$500,000,000.00	N/A		PA	
PI 526		05/11/2009	Fee Payment	N/A	N/A	$0.00	-185.00	$0.00	N/A		PA	
PI 526		05/11/2009	Fee Payment	N/A	N/A	$0.00	-185.00	$0.00	N/A		PA	
PI 526		05/11/2009	Fee Payment	N/A	N/A	$0.00	-185.00	$0.00	N/A		PA	
PI 526		05/11/2009	Fee Payment	N/A	N/A	$0.00	-185.00	$0.00	N/A		PA	
PI 526		05/11/2009	Fee Payment	N/A	N/A	$0.00	-185.00	$0.00	N/A		PA	

Report displays all transactions for permits that are linked to the locations in the User's profile for the Manage or Audit Mailing Activity Service

Users may access postage statement details under Transaction Type

Mailing Activity Report

Mailing Summary Report

Maximum search is within a 365 day period.
Start Date cannot be before 01/01/2005.
Account Type and Permit Number are required fields.

Search for Mailing Summary

Form	Location	* Account Type	* Permit / Pub Number
All Forms	GATEWAY SERVICES	Permit Imprint	526

Customer Reference Number	Start Date	End Date	
	05/01/2009	06/01/2009	SEARCH

Mailing Summary

Form	Entry Discount	Line	Description	Pieces	Piece Rate	Piece Postage	Pounds	Pound Rate	Pound Postage	Line Postage
3600-R	None	B9	Presorted	2,500,000	$0.75700	$1,892,500.000	0	$0.000	$0.000	$1,892,500.000
	None	B10	Single-Piece	2,500,000	$0.88000	$2,200,000.000	0	$0.000	$0.000	$2,200,000.000
3602-R	None	A1	5-Digit	1,000,000	$0.23300	$233,000.000	0	$0.000	$0.000	$233,000.000
	None	A2	3-Digit	1,000,000	$0.25100	$251,000.000	0	$0.000	$0.000	$251,000.000
	None	A3	AADC	1,000,000	$0.25300	$253,000.000	0	$0.000	$0.000	$253,000.000
	None	A4	Mixed AADC	1,000,000	$0.27000	$270,000.000	0	$0.000	$0.000	$270,000.000
	None	D2	Mixed AADC	1,000,000	$0.27300	$273,000.000	0	$0.000	$0.000	$273,000.000
									Total:	$5,372,500.000
									ostage):	$5,372,500.000

Report displays postage amounts by line item for a permit and postage statement type for permits that are linked to the locations in the User's profile for the Manage or Audit Mailing Activity Service

Track & Report

- ADVANCE
- Audit Mailing Activity (PostalOne!)
- Delivery Confirmation
- Mailing Reports (PostalOne!)
- Manage Electronic Return Activity (PRS)
- Manage Electronic Verification Activity (eVS)
- Product Performance Reports
- Track & Confirm

- Manage Electronic Return Activity (PRS)

- Manage Electronic Verification Activity (eVS)

- Signature Confirmation

- Track & Confirm

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The Business Service Administrator (BSA)

- Key contact for a Business Location for the management of the selected Service.
  - Approves and deactivates all user requests for Services at the business location
  - Assigns the appropriate access levels to its users
  - Assigns additional approved users to the BSA role
- The first user requesting a service for a business location will be prompted to assume the BSA role
- User requests access to a Service for a business location, the system checks to see if that service requires a BSA.
  - If yes, the system checks to see if the BSA is assigned
  - If no BSA, the user requesting access will be notified of the BSA requirement and asked if they will assume the BSA responsibility
- If the user agrees to become the BSA the registration process continues.
- If user declines, the service request goes into a pending status until there is a BSA for this Service at the Business Location
  - The request is held for 25 days, then is purged

User Management – BSAs Only

- Allows BSAs to manage the users for their Business Locations

Request Inbox – BSA Only

- The Request Inbox displays all access requests for which the user is the BSA. The BSA selects a request by clicking the last name of the requester.

Request Inbox – BSA Only

- BSA can then approve, deny, or return the request to their queue

Request Inbox – BSA Only

- When action (approve or deny) is taken on a request, the BSA receives a confirmation screen to confirm the action

Manage User Access – Request Services for Users

Allows BSAs to assign or revoke the BSA role for other users.

Allows BSAs to request additional services and locations for their users

Manage User Access – Request Services for Users

Step 1. BSA selects a user search option.

Business Service will display all users linked to that service.

Business Name will display all users linked to a location

Step 2. Click Search to display users.

Manage User Access – Request Services for Users

Step 3. Search results display users. BSA selects user.

Step 4. To add Services and locations to a user, select Request Access.

Manage User Access – Request Services for Users

Step 5. Select the desired Service.

Step 6.   Click Search

USPS.COM | GATEWAY | HELP | SIGN OUT

Profile   Request Access   Request St...

Manage User Access

Select a Business Service and Business Location(s).

Make sure to click the **Refresh** button to view the available business locations when selecting a different service.

Business Service
Customer/Supplier Agreements (CSAs)   Search

	Business Name	CRID	Ad...
☐	GATEWAY SERVICES	5221272	4600 FAIRFAX D
☐	GATEWAY SERVICES	5221270	475 LENFANT F
☐	GATEWAY SERVICES	5221273	1735 N LYNN S

Note: Selection and Search results default to Customer Supplier Agreements. You must select the desired Business Service and click Search again.

Cancel   Continue

Manage User Access – Request Services for Users

Manage User Access – Request Services for Users

Step 8.   Confirm request.

Manage User Access – Request Services for Users

Step 9. Permissions granted. Since the Administrator initiated the request, the system will grant access and not require the Administrator to approve again through their Request Inbox.
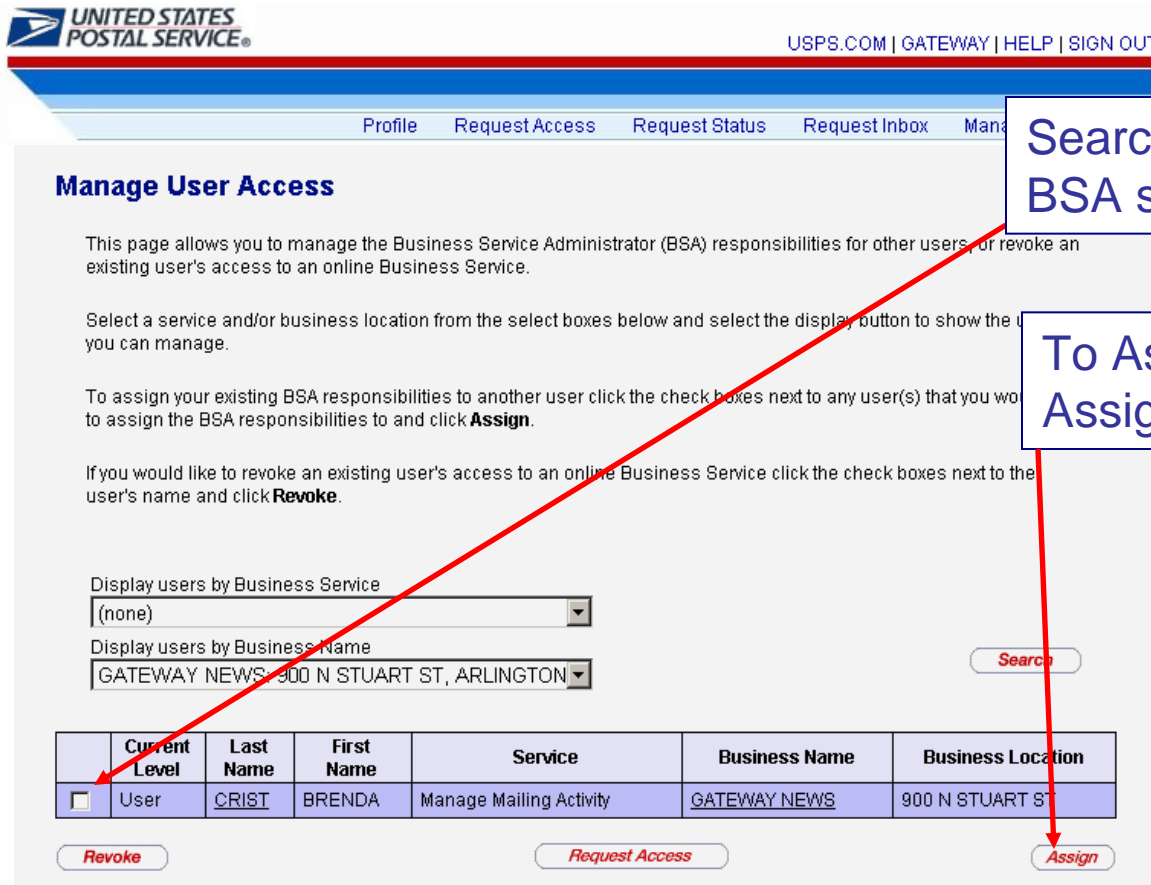
Manage User Access – Assign BSA Role

Search results display users. BSA selects user.

To Assign the BSA role, select Assign.

Manage User Access – BSA Only

Confirm BSA role assignment.

BSA Responsibilities for Full-Service

- User Access
  - Ensure company users are linked to the correct company location (CRID)
  - Ensure that all company users needing to submit eDoc or view full service reports have access to Manage Mailing Activity Service
- eDoc Submission
  - Make sure any company permit (s) are linked to the correct CRID(s)
  - If submitting eDoc, ensure that company location CRID is used in the Mail Facility ID field of the Mail.dat file
  - Ensure mail containers are being linked to FAST appointments
  - If using Customer Supplier Agreements (CSA) verify through CSA service that CSA is complete and ensure that CSA trip ID is included in Mail.dat file
- Data distribution
  - Ensure company Mailer ID(s) are linked to the correct company CRID(s)
  - Create and/or edit Mailer ID profile if data distribution is desired
  - Apply for Mailer ID if needed (through Mailer ID Services)

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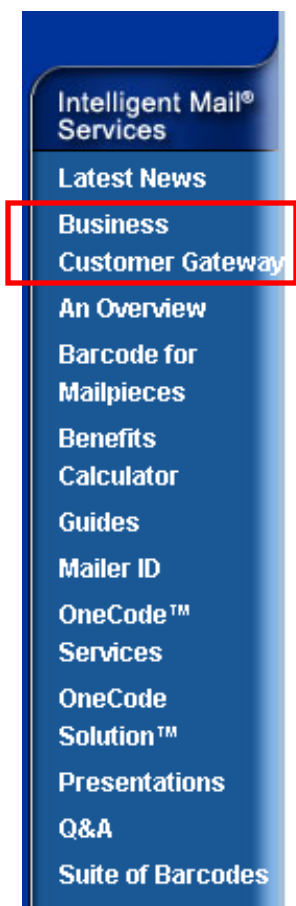- **Customer Support**

The Customer Support section of the Business Customer Gateway provides links to a range of resources

- National Customer Support Center – RIBBS

- Service Updates

- ePubwatch

- Business Service Network – BSN eService

- Gateway Help Desk

- USPS News & Information

Customer Support

- National Customer Support Center - RIBBS
- Service Updates
- ePubwatch
- Business Service Network (BSN) eService
- Gateway Help Desk
- News & Information
- User Responsibility Agreement (PDF) (DOC)

The National Customer Support Center – RIBBS web site provides instructional material, detailed guides, and relevant news

Additional customer support links

Link	Description
Service Updates	Information on natural disasters and severe weather conditions affecting USPS service
ePubwatch	Electronic Publication Watch System for tracking periodical mail
Business Service Network (BSN) eService	BSN eService allowing customers to create and monitor service requests online
Gateway Help Desk	Phone numbers, email addresses and other contact information for customer support
News & Information	Additional links to USPS news and bulletins
User Responsibility Agreement (PDF) (DOC)	System user's agreement available in two formats: PDF and Microsoft Word

Questions???