Business Customer Gateway External Users Release Notes – Release 1.8 March 6, 2011

The Business Customer Gateway (BCG) external application, Release 1.8 will be deployed on March 6, 2011 to support additional functionality. User changes will be apparent to end users of the application. System Changes affect the technical details (processing order, data model, etc.) of the application.

User Changes

1. Contingent Service

New Business Service Administrator (BSA) roles and service type within the Business Customer Gateway will be enabled to increase security. The ability to establish a contingent-dependent service relationship is new functionality for Business Customer Gateway sub-systems. System Administrators will have the capability to establish contingent-dependent service relationships; external users will experience a modified approval sequence for services with this relationship. Terminologies to describe the relationship between a *contingent service* and business service Administrator (BSA) are defined below.

- <u>Contingent Service</u>: The service for which the existing BSA approves or assigns BSAs access for one or more dependent services.
- <u>Dependent Service:</u> A service whose BSA access is granted by a Contingent BSA.
- <u>Contingent BSA</u>: The BSA that can approve or assign a BSA for a dependent service.
- <u>Dependent BSA</u>: The user who is requesting access to become the BSA of a dependent service.

Business Customer Gateway sub-systems will be enhanced to enable a business service to be configured for a contingent-dependent service relationship. Certain services that require improved levels of security to access business services will be configured for a *Contingent BSA* by USPS System Administrators. This would enable the BSA for a specified service (*Contingent Service)* to approve who becomes the BSA for another specified service (*<u>Dependent Service)</u>.*

When a user requests access to a service, the system will verify whether the service access is contingent on access to another service. If the service that is being requested is a dependent service, the Contingent BSA would need to approve the Dependent BSA for the service access at that CRID. Existing functionality for BSA Delegate will not be changed.

Upon Release 1.8, the existing Manage Mailing Activity (MMA) and Audit Mailing Activity (AMA) services will be configured as a contingent-dependent service. Because these services allow a user access to permit information and postage statement transactions, the AMA service was configured for as a Dependent Service to allow users to control access. The BSA for MMA would be the Contingent BSA, and the user requesting access to AMA would become the Dependent BSA. In other words, a user who requests the AMA service will be approved by the BSA for the MMA. If no BSA for the MMA exists, the user will be prompted to become the BSA for MMA and AMA services. If a BSA for MMA already exists, he would have control over who becomes BSA for AMA.

The following enhancements have been made regarding how the assignment of the BSA role occurs for a dependent service while using existing Manage User Access functionality.

1.1 Dependent Service Functionality

- Dependent services will display in Business Service drop-down field. If a BSA already exists for the dependent service or Customer Registration ID (CRID) combination for a dependent service that service will not display in the drop down.
- When a user clicks on the Manage User Access link, Revoke, Request Access and Assign buttons are disabled and grayed out until the user *searches* for existing users by entering some values for the business Name or business Services and selects valid inputs for these actions to be executed.
- If return results contain users with dependent services (after the user clicks the Search button on Manage User Access page), an asterisk will display next to the business service name in the business service cell. Below the table of results, there will be an explanation stating: " * - Dependent Services".
- Request Access button will be disabled and grayed out if a user's record with a dependent service is selected. This button should be enabled if the no users with a dependent service are selected.
- Revoke button should be disabled and grayed out if a user's record with dependent service is selected. This button should be enabled if the no users with dependent service are selected.
- If a user selects multiple records for the same dependent service and CRID combination and clicks the Assign button → a validation message will display stating that only one user for the selected service and business can be assigned a BSA role. The Revoke, Request Access and Assign buttons are disabled and grayed out until the user enters the appropriate input.
- If a user selects multiple records and at least one of them for dependent services and there is no BSA for dependent services and clicks the Assign button → the user is directed to the Manage User Access Confirmation page.
- If records displayed on the Manage User Access Confirmation page contact are dependent services, an asterisk will display next to the business service name in the business service cell. A footnote marked by an asterisk (*), explains a Dependent Service, below the table of results.
- When a user clicks the Confirm button, the user for the dependent service is prompted to become the BSA (after he accepts the online agreement and the request is approved by contingent BSA).

2. Program Registration Application

The BCG will be enhanced to host two new USPS business services, Shipping Services and Incentive Programs. These new services will be interfaced with the new Program Registration application, a system that allows a user to enroll and manage specific services and programs.

Program Registration allows customers to initiate an enrollment process and complete the steps in a self-paced, automated fashion. In this initial phase of Program Registration, the processes by which an external user would register for Shipping Services or Incentive Programs is enabled. The internal aspect of Program Registration enables internal users with an internal console for the Help Desk or Program Office. The Help Desk may play a role in approving tasks in the enrollment process and overriding certain enrollment steps. The interfaces with different systems allow information about the customer to be synchronized between various, interfacing USPS systems.

2.1 Shipping Services Enrollment

The Program Registration application supports a shipping services and Incentive Program on-boarding online process that is intended to streamline the customer engagement process. The system will direct the user to the My Profile Survey that is intended to collect key enrollment data. The Program Registration Phase I application will accommodate the following shipping programs:

Electronic Verification System. The Electronic Verification System (eVS ®) allows parcel mailers to document and pay postage by transmitting electronic manifest files to the eVS database, which is part of the *PostalOne!*® system.

Parcel Return Service. The Parcel Return Service (PRS) provides businesses a convenient, economical solution for returning merchandise.

Express Mail Manifesting. Express Mail Manifesting system (EMM) allow mailers to send the Postal Service™ an electronic file documenting postage and special service fees for all pieces in an Express Mail mailing.

Tracking Only. The Tracking Only Service is a program that provides tracking information through Confirmation Services for mailers who are not certified customers of Electronic Verification System (eVS), Parcel Return Service (PRS), or Electronic Mail Manifesting (EMMS) programs.

2.1.1 Shipping Services Enrollment Features

Program Registration features provide shipping service customers the ability to complete enrollment. Once enrolled, customers can manage their programs. The functionality listed below, highlights the key features for Shipping Services enrollment.

<u>My Profile Survey</u>. Prior to enrollment in any program the user must access the My Profile Survey page and answer a series of questions to determine eligible programs. The survey can be completed in different sessions, and will continue to display a status of “Incomplete” until fully completed. Users can edit survey responses, changes may affect the user’s currently enrolled programs, with the exception of the Tracking Only program. The user will be able to edit the My Profile Survey answers to add additional shipping programs if the user is enrolled in the Tracking Only program. The system will only display questions that apply to all users and are not dependent on a previous answer. Questions are not asked of all users, but will display if the user’s previous answers trigger the question.

<u>Certification Questionnaire</u>. If a user is sending electronic files, then file certification will be required. If the Profile Survey does indicate ‘no’, file certification will not be a step for enrollment.

<u>Program Registration Landing Page</u>. The Program Registration Landing Page serves as the homepage for the user to view and register for the various programs. From the landing page, the user can find their information (username and user ID) and the programs that are available for enrollment.

<u>Program Summary.</u> The program summary tab is used as an end-user messaging platform for information regarding all program tasks. Tasks and task statuses are displayed to track progress. All tasks have an associated tab for the user to complete.

<u>Manage Shipping Locations</u>. The Manage Shipping Locations tab displays the Master CRID for the program as well as any CRIDs for additional locations that the user has added. The page will allow the user to request Mailer IDs for all CRIDs, which are also displayed on the page. The page allows the user to search by CRID, MID, Company, or Address.

Manage Payment Accounts. The Manage Payment Account tab is used as a platform to manage payment accounts. When enrolling in eVS, PRS, or incentive programs, the user can link a permit associated with a valid CRID to the program. When enrolling in Express Mail Manifesting, the user can link an Express Mail Corporate Account (EMCA) or Federal Agency Account number to the program.

Manage Clients. The Manage Clients page allows a Mail Service Provider (MSP) the ability to request By/For Mail IDs for a client's location for a Shipping Services Program. The page will allow the user to search for an individual client location by Company or Addresses to import multiple client locations at once, through a bulk import system. The user can create new client locations if the searched location is not found in the Customer Registration system.

Additional Contact Information. The Additional Contact Information Tab displays the required and optional contact information the user can provide to the USPS.

2.1.2 Contingent Service for Shipping Services

If a user assumes the Business Services Administrator (BSA) role for Shipping Services, this user will require contingent approval from both the Manage Mailing Activity BSA and the Mailer ID BSA. Once the user has been approved by both these BSAs, he will be the Shipping Services BSA. Once registration is complete and the user has obtained a username, password and business account in the Customer Registration system, the user will be directed to the Business Customer Gateway (BCG).

2.1.3 Enrollment for Multiple Locations

The bulk import function allows a user to register multiple locations to Shipping Services simultaneously, rather than requiring each location to be entered separately. The system identifies the locations that already exist in the Customers Registration system and allows the user to create CRIDs for new locations.

After the system processes the bulk import, the returned page will have a split screen with both the Location Found and Location Not Found screens displayed.

2.2 Incentive Programs

Incentive Programs allow customers to participate in marketing campaigns offered by the USPS. Customers can register for these events and qualify for incentives available for certain mail classes, products or services offered by USPS.

The Incentive Programs online enrollment allows customers to enroll for a selected incentive program. USPS Program Offices will verify eligibility and qualification criteria. Once qualified, the customer can manage enrollment profiles or option- out of the incentive and enroll in a different incentive. The system also lists current and upcoming incentive program enrollment dates. The Program Registration landing page displays specific information, including the incentive parameters and steps for enrollment. The registration process may have multiple steps or no steps depending on the incentive. Program Registration features for the Incentive Programs include the following (tabs and pages).

Program Registration Landing Page. The Program Registration Landing Page serves as the homepage for the user to view and register for the various programs. From the landing page, the user can find their information (username and user ID) and the programs that are available for enrollment.

Program Summary. The program summary tab is used as a messaging platform for information regarding all program tasks. Tasks and task statuses are displayed to track progress. All tasks have an associated tab for the user to complete.

Manage CRIDS. The Manage CRIDs tab displays CRIDs that have been enrolled in an incentive based on the program selected. The user will be able to link or un-link a CRID to a program. The page allows the user to search by CRID, Location, Status, or Company.

2.2.1 Incentive Enrollment Functionality

- The system allows a user to filter the displayed incentives by the enrollment status. A user selects an Incentive Program by clicking on it.
- The information on the Program Summary tab is updated accordingly to display information, including incentive parameters of the selected program. The tasks to be completed to finalize program enrollment will also display.
- A user should click the “Enroll” button to initiate the enrollment process for the selected incentive program. After clicking the “Enroll” button, the button text will change to “Unenroll”.
- If a user clicks the “Enroll” button, the Program Summary page refreshes to display the enrollment steps. Each will have an initial status of “Incomplete”:
    - Additional Contact Information
    - Select CRIDs
    - Select Manage Payment Accounts
    - Select Incentive Parameter
    - Help Desk Approval (for some Incentive Programs)
    - Incentive Owner Approval (for some Incentive Programs)
- A user can access the Alternate Contact Information tab, by clicking on the Additional Contact Information task status link within the Program Summary tab or the tab itself, to enter either an Alternative Primary Contact information (Required) or Technical Contact information (Optional).
- A user can access the Manage CRIDs tab by either clicking on the tab itself or by clicking the Manage CRIDs task status link within the Program Summary page. The system will display a list of the CRIDs associated to the user. A user can select one or more CRIDs by selecting multiple checkboxes to link or unlink to the Incentive Program.
- A user can access Manage Payment Accounts tab by either clicking on the tab itself or by clicking on the Manage Payment Accounts task status link within the Program Summary tab. The system displays the Permit Number, Permit Type, Finance Number, and associated CRIDs for the user. The user can link and unlink selected payment accounts to the Incentive Program. The system demarcates those Permit Numbers, Permit Types and Finance Numbers to which the user already has access for a given Incentive Program when the user is enrolling for that Program.
- If the incentive program allows Mail Service Providers (MSP) permits, a user can link permits to the selected incentive program. This means a mail owner plans to use MSP permits for the mailings for the selected incentive program. The system will display a MSP checkbox and require the user to check it. Upon clicking the MSP check box, the system will display the message: “If you wish to claim volume that will be sent through a MSP permit, you will be required to report MSP volume and submit corresponding PS Form 3602 documentation.”

- The system requires the user to check the “I Agree” check box before proceeding to add a Mail Service Provider (MSP) Permit Number, Permit Type and Finance Number. If the MSP Permit checkbox is checked, the system allows the user to upload postage statement documentation or files by clicking the Upload MSP Postage button. Clicking this button will open a pop-up window for the user to select files. The system presents the user some options:
    - Associate uploaded files to the selected IP
    - Allow uploaded files to be of any file format
    - Allow uploaded files to be of any size
    - Store all uploaded documentation for 7 years
- The system sets the program status to “Enrolled” when the final enrollment task is marked as “Complete”. Upon successful enrollment in an Incentive Program, a user can still request to unlink a CRID or Permit from an incentive program. When a user attempts to unlink a CRID or Permit from an enrolled Incentive Program, the system notifies the Help Desk. Upon successful enrollment in an Incentive program, a user can link permits with an activation date that is later than the incentive program enrollment start date. Upon successful enrollment in an Incentive Program, the Unenroll button will be disabled. A rollover message will direct the user to contact the Help Desk to request to unenroll from the Incentive Program.

3. System Changes

The following items in this release are identified as “system changes” to address small functionality gaps, or known issues.

External Users Changes

1. The Business Customer Gateway page footer has been updated regarding copyright marks from Copyright 2010 to Copyright 2011.

2. The Business Customer Gateway link to the User Responsibility Agreement link will be removed.