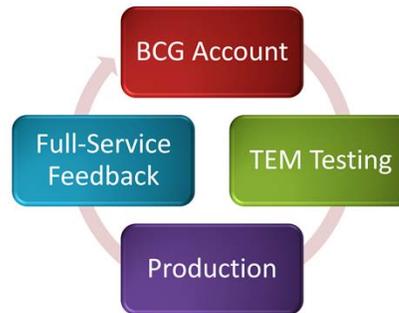# Business Customer Gateway (BCG)

Lifecycle of a Full-Service Mailing
within the BCG

November 26, 2013

Welcome to the Business Customer Gateway (BCG) training. Today we will look at the lifecycle of a Full-Service Mailing within the BCG.

Agenda

- **Review of Full-Service requirements and terms**
- **Business Customer Gateway (BCG) Account**
  - Establishing an account
  - Assignment of Customer Registration ID (CRID)
  - Assignment of Mailer ID (MID)
  - Linking your permits
- **Test Environment for Mailers (TEM) to test eDoc**
  - Who requires TEM testing
  - How to submit Mail.dat and Mail.XML files through TEM
  - View status of mailings through the BCG
- **Submitting files to Production**
  - How to submit Mail.dat and Mail.XML files through Production
  - View status of mailings through BCG
- **Full-Service Feedback**
  - Quality of Full-Service mailing
  - Tracking data

Agenda

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Today we want to talk about how an important tool, called the Business Customer Gateway (BCG), helps to support mailers as they transition to Full-Service. First, we will talk briefly about the requirements of Full-Service and review some common terms and definitions associated with Full-Service and the BCG. Then we will talk about how a new user can register online to obtain a BCG account and receive a Customer Registration ID (CRID) and Mailer ID (MID). We will review how existing users can obtain additional MIDs, if needed. We will also discuss how to link your permits within BCG. Next we will talk about a test environment that's available to mailers to test their electronic documentation files prior to submitting them in production, in order to ensure accuracy. After viewing the status of the mailings through the BCG in TEM, we will talk about how to submit files in production. We will also review how to view the status of mailings in production. Finally, we will review how to access Full-Service feedback within the BCG.

- The following categories are eligible for a per piece Full-Service discount

    - **First-Class Mail® postcards, letters and flats**
    - **Standard Mail® letters and flats**
    - **Periodicals letters and flats**
    - **Bound Printed Matter flats**
    - **Standard Mail Basic Carrier Route (CR) flats**
    - **Standard Mail High Density CR flats**
    - **Standard Mail High Density Plus CR flats**
    - **Periodicals CR flats**

  - *Not Eligible (even with an IMb)*
    - **Standard Mail Saturation CR flats**
    - **Bound Printed Matter CR flats or DDU-entered flats**
    - **Business Reply Mail (BRM), QBRM, CRM or PRM**

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Mailers who receive automation prices can qualify for an additional per piece discount on their mail by doing Full-Service.

The following classes of mail are eligible for Full-Service:
•First-Class Mail cards, letters and flats
•Standard Mail letters and flats
•Periodicals letters and flats
•Bound Printed Matter flats
•Standard Mail Basic Carrier Route flats
•Standard Mail High-Density Carrier Route flats
•Standard Mail High Density Plus Carrier Route flats
•Periodicals Carrier Route flats (all levels)

The following are not eligible for Full-Service, even when the pieces are barcoded with an Intelligent Mail barcode:
•Standard Mail Saturation Carrier Route flats
•Bound Printed Matter Carrier Route flats or Destination Delivery Unit (DDU)-entered flats
•Business Reply Mail (BRM), Qualified Business Reply Mail (QBRM), Courtesy Reply Mail (CRM), or Permit Reply Mail (PRM)

Please note that although QBRM and PRM do not qualify for Full-Service, both are still required to have an Intelligent Mail barcode.

Common Terms and Definitions

Term	Definition	Uses
Electronic Documentation (eDoc)	• Electronic mailing Information that replaces the use of hardcopy postage statements and supporting documentation (e.g. the qualification report) with electronic submission	• eDoc is a requirement for Full-Service
Customer Registration ID (CRID)	• A unique ID number issued by USPS to identify a customer's physical business location (address)	• Used to identify Mail Owners and Mail Preparers within eDoc • Used to determine to whom mailing information and reports should be distributed
Mailer ID (MID)	• A six- or nine-digit number issued by USPS to a mail owner or mail service provider.	• Used in IMb barcodes • Also used to identify Mail Owners and Mail Preparers within eDoc • Used to determine to whom mailing information and reports should be distributed
Business Services	• Services that cover basic business functionality within the BCG • Depending on your company's needs, different employees may need access to different services • Access to services is regulated by the Business Service Administrator (BSA) of each service	• Used to obtain access to certain functionality within the BCG
Business Service Administrator (BSA)	• If you are the first user to request a service for your location, you will become the **Business Service Administrator (BSA)** of that service; you will be able to manage that service for any future users, controlling who can and cannot use it at your business location	• Role used to grant or deny other users access to a business service/functionality within the BCG

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Let's talk about some common terms and definitions that are used within Full-Service and the BCG. Full-Service terms include Electronic Documentation (eDoc), Customer Registration (CRID) and Mailer ID (MID). Business Services and Business Service Administrator are terms specific to the BCG.

As you remember, Electronic documentation (or eDoc) is Electronic mailing Information that replaces the use of hardcopy postage statements and supporting documentation (e.g. the qualification report) with electronic submission. eDoc is a requirement for Full-Service.

The Customer Registration (or CRID) is a unique ID number issued by USPS to identify a customer's physical business location (address). CRIDs are used to identify mail owners and mail preparers within eDoc and to determine to whom mailing information and reports should be distributed.

A Mailer ID (or MID) is a six- or nine-digit number issued by USPS to a mail owner or mail preparer. It is used in IMb barcodes, to identify mail owners and mail preparers within eDoc and also to determine to whom mailing information and reports should be distributed.

Business services are used to obtain access to basic functionality within the BCG. For example, a business service allows a mailer to monitor balances & fees, manage permit information for business locations and submit their mailing information and postage statements electronically using Mail.dat or Mail.XML. Another service may provide access to schedule a mailing appointment. Depending on your company's needs, different employees may need access to different services. Access to services is regulated by a role called the Business Service Administrator (BSA) who acts as the administrator of a service, granting permission or access to use a service.
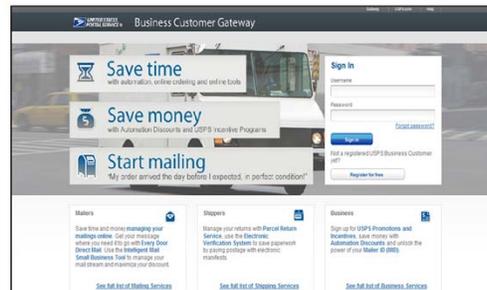
The Business Service Administrator (or BSA) is a role given to the first user to request a specific service for a business location. For example, let's say there are two employees in my company. I am the first user to log onto the BCG and request access to the service that allows me to request and manage Mailer IDs. This service is called the Mailer ID service. I will automatically become the Business Service Administrator (or BSA) for that Mailer ID service for my business location. When the second employee

logs onto the BCG and requests the Mailer ID service, as the BSA of that service, I would now grant or deny access to that specific service to the other employee in my company.   The BSA role manages that service for any future uses, controlling who can and cannot use the service at their business location.

What is the Business Customer Gateway (BCG)?

The Business Customer Gateway provides a single entry point for Postal Service® online business services.

- Users can access multiple services essential to full-service to monitor balances and fees for ease of mailing, to submit mailing information and postage statements electronically using Mail.dat or Mail.XML and receive Full-Service Reports

- Access to multiple services is provided through a single user name and password.

The Business Customer Gateway provides a single entry point for Postal Service® online business services. Users can access multiple services essential to full-service to monitor balances and fees for ease of mailing, to submit mailing information and postage statements electronically using Mail.dat or Mail.XML and receive Full-Service Reports. Access to multiple services is provided through a single user name and password.

New User: 1) Register

https://gateway.usps.com

The following slides will illustrate how to register for a new account, navigate to the Business Customer Gateway by typing in gateway.usps.com. Click on "Register for Free" on the BCG home page.

To establish a new account, create a user name, password and two security questions. Enter your name, company name and address, phone number and email address. This information will be used to create a CRID for you upon completion of registration.

After reviewing the Privacy Policy, click on "Create Account" and a confirmation email will be sent to the email address you provided.

New User: 3) Terms and Conditions

Business services are used to obtain access to basic functionality within the BCG. The first user at a business location to request a particular service will become the Business Service Administrator (BSA) for that application or service.

A business service allows a mailer to monitor balances & fees, manage permit information for business locations, submit their mailing information and postage statements electronically or provide access to schedule a mailing appointment.

All users must agree to the terms and conditions, which can be viewed and printed from the link shown here

Clicking **Continue** takes the new user to a confirmation page

Upon successful registration, a user will eligible to take advantage of the services offered within the BCG. Remember. business services are used to obtain access to basic functionality within the BCG. Business services pertinent to full-service allow a mailer to monitor balances & fees, manage permit information for business locations, submit their mailing information and postage statements electronically or provide access to schedule a mailing appointment. Remember that the first user at a business location to request a particular service will become the Business Service Administrator (BSA) for that application or service. The BSA manages that service for any future users, controlling who can and cannot use it at a business location.

All users must agree to the terms and conditions, which can be viewed (and printed, if desired) from the link underlined in blue. Clicking "Continue" takes the new user to a confirmation page.

We will talk about the confirmation page in the next two slides. In the top half of the confirmation page, you can see a CRID and a 9-digit MID have been assigned to the new account. Remember that a CRID is a unique ID number issued by USPS to identify a customer's physical business location (address). When you entered your company name and address during the registration process, this was used to create the CRID. A MID is a six- or nine-digit number issued by USPS to a mail owner or mail service provider. You can see it has also been automatically assigned during the registration process.

Now let's talk about the information contained in the bottom half of the confirmation page.

Toward the bottom of the confirmation page you will see the list of services for which the new user is eligible. New business users will be eligible to use popular business applications or "services" pertinent to Full-Service as well as access other services. Two services pertinent to Full-Service capabilities are the Mailer ID service and the Manage Mailing Activity service. The Mailer ID service allows you to request and manage Mailer IDs. In the next slide, we will talk briefly about how and why existing users may want to obtain multiple MIDs.

The Manage Mailing Activity service provides access to important Full-Service capabilities to:

• Manage permit information for business locations

• Monitor balances and fees for ease of mailing

• Submit mailing information and postage statements electronically using Mail.dat, Mail.XML

• Provide immediate access to detailed mailing reports, including pending postage statements, mail quality, electronic mail improvement,

In a few moments, we will talk more about an essential step of managing

permit information within the BCG. Click continue to complete the registration process and access the BCG home page.

As an Existing Customer, how do I obtain an additional MID?
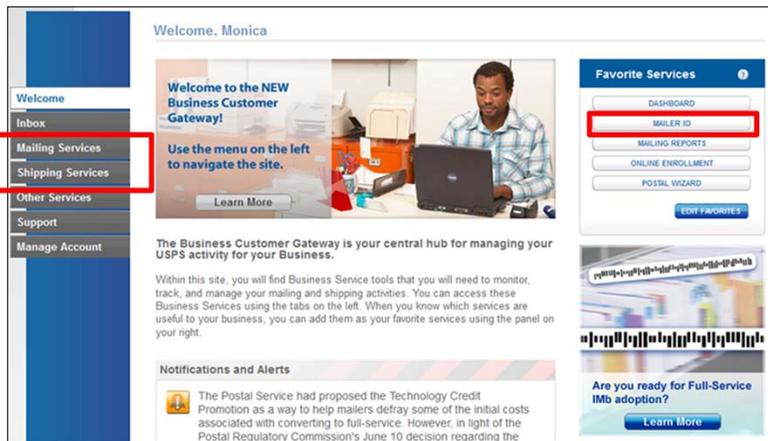
- Customers can obtain additional MIDs through the BCG "Mailer ID" portal, which can be accessed one of three ways:
    - Mailing Services menu
    - Shipping Services menu
    - Click on the "Mailer ID" button within the Favorite Services panel

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Now that we have reviewed how a new account obtains a CRID and MID let's look at how any existing customer can also obtain additional MIDs. For physical mailpiece barcodes, some customers will require more than one Mailer ID to maintain barcode uniqueness. For example, a Mail Owner may obtain 2 MIDs which will be used by 2 different Mail Preparers for multiple mailings. Two different and distinct MIDs are used to uniquely identify each vendor.

For this reason, existing customers may want to obtain one or more MIDs in addition to the MID that was automatically assigned.

Let's look at how we might do this within the Welcome page on the BCG. Business Services are located under either Mailing, Shipping or Other Services on the left sidebar navigation. For our purposes, we will focus on the Mailing and Shipping services options. Mailing services will help you manage day-to-day activities from design and preparation of your mail to tracking your mailings in the mail stream. Shipping services allow customers to enroll and manage the various package product lines the USPS has to offer.

Existing Mailers may obtain additional MIDs through the BCG Mailer ID portal which can be accessed by clicking on the Mailing Services or Shipping Services menus on the left side of the screen or by clicking the Mailer ID option under the Favorite Services panel.

To obtain an additional MID, customers login to the BCG and access the Mailer ID portal via the Mailing Services menu, Shipping Services menu, or the Favorites panel on the right hand side of the screen.

Now let's look at how we can link permits within the BCG.

Linking Your Permits
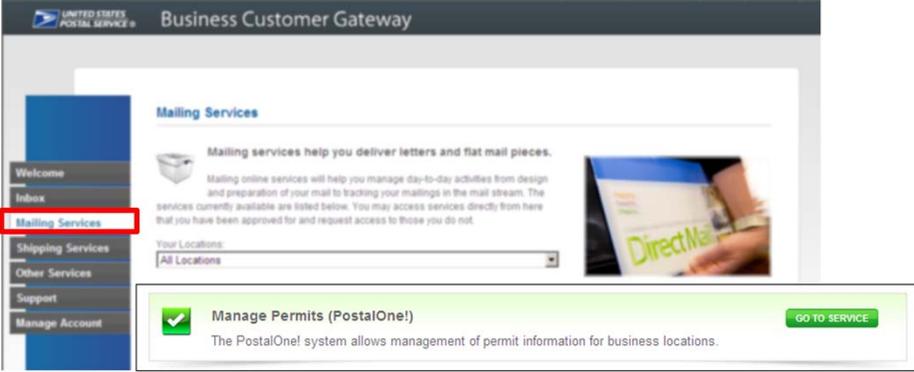
Business Customer Gateway

Mailing Services

Mailing services help you deliver letters and flat mail pieces.

Mailing online services will help you manage day-to-day activities from design and preparation of your mail to tracking your mailings in the mail stream. The services currently available are listed below. You may access services directly from here that you have been approved for and request access to those you do not.

Welcome
Inbox
Mailing Services
Shipping Services
Other Services
Support
Manage Account

Your Locations:
All Locations

✓ Manage Permits (PostalOne!)   GO TO SERVICE
The PostalOne! system allows management of permit information for business locations.

- Before you can view any of your mailing information, you must establish a link between your new BCG account and your mailing permit, if you have one. There are two ways to establish this link:
    - Contact the Help Desk for assistance
    - Utilize the BCG:
        - Click Mailing Service
        - Go to the "Manage Permits" service

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Now that we have registered and created a new user account let's talk about how we link our permit information in the BCG. Before you can view any of your mailing information, you must establish a link between your new **BCG account** and your **mailing permit**, if you have one. There are two ways to establish this link. If you are a new USPS customer and do not have any historical payment transactions, you should contact the Help Desk for assistance. If you are an existing USPS customer with historical payment transactions, you may utilize the BCG by going to "Mailing Service" at the BCG Welcome page and then under the "Manage Permits"section, click on "Go To Service."

Click your business location link. Any linked permits will display in "Permit Profile" tab. Click the "Permit Validation" tab. NOTE that only the Business Service Administrator (BSA) for the "Manager Permits" service can access this tab.

Linking Your Permits

Permit Profile | Associated Business Locations | **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, Post Office of Mailing ZIP Code, and the exact dollar value of one of last 10 transactions performed on that account. After successful authentication the permit account will be linked to your currently selected business location and will be visible on the Permit Profile tab.

Click here to see additional information on permit validation rules.

*Required

* Account (permit/publication) Number:	1
* Account Type:	PI-Permit Imprint
* Post Office of Mailing ZIP Code:	20260
* Amount of one of last 10 transactions on this account:	120.13
	Validate

- Enter the Permit Type, Permit Number, and Permit ZIP of Post Office where the mailing permit is held
- Enter one of the last 10 transaction amounts for your permit and click "Validate"
- Once validated, the permit will appear on the "Permit Profile" tab. You will now be able to view all applicable mailing activity for this permit
- If you don't know your transaction amount or have not yet mailed with this permit, contact the *PostalOne!* Help Desk for permit linkage assistance

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Enter the Permit Type, Permit Number, and Permit ZIP of Post Office where the mailing permit is held. Enter one of the last 10 transaction amounts for your permit and click "Validate". Once validated, the permit will appear on the "Permit Profile" tab. You will now be able to view all applicable mailing activity for this permit. If you don't know your transaction amount or have not yet mailed with this permit, contact the *PostalOne!* Help Desk for permit linkage assistance

What is TEM and who is required to use it?

- The Test Environment for mailers (TEM) is designed to simulate your live mailing environment so that the user experience in TEM is reflective of production functionality
- Mailers can submit their electronic mailing information generated from their presort software to the Postal Service and view the resulting electronic mailing postage statements and qualification reports extracted from their electronic submissions

Type of Mailer	Required to use TEM?
Mail Owners and Mail Service Providers <u>using vendor approved software</u> that has been validated for eDoc and Full-Service with the Postal Service	No
Mail Owners and Mail Service Providers <u>not using vendor approved software</u> that has been validated for eDoc and Full-Service with the Postal Service	Yes

TEM Testing   15

The Test Environment for mailers (TEM) is designed to simulate your live mailing environment so that the user experience in TEM is reflective of production functionality. Mailers can submit their electronic mailing information generated from their presort software to the Postal Service and view the resulting electronic mailing postage statements and qualification reports extracted from their electronic submission. Mail Owners and Mail Service Providers <u>using vendor approved software</u> that has been validated for eDoc and Full-Service with the Postal Service are not required to test in TEM. Mail Owners and Mail Service Providers <u>not using vendor approved software</u> that has been validated for eDoc and Full-Service with the Postal Service are required to test in TEM.

eDoc Requirement and TEM

eDoc is electronic mailing Information that replaces the use of hardcopy postage statements and supporting documentation (e.g. the qualification report) with electronic submission

- The options for submitting electronic documentation are:

eDoc Method	Requirement	Required to use TEM?
Mail.dat or Mail.XML	Required for mailings of 10,000 pieces or more	Yes
Postal Wizard	For mailings of less than 10,000 identical-weight pieces	No
Intelligent Mail for Small Business (IMsb) Tool	For mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually	No

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You remember that eDoc is electronic mailing Information that replaces the use of hardcopy postage statements and supporting documentation (e.g. the qualification report) with electronic submission.

There are four methods which mailers may use to submit their mailing information electronically to USPS:

- Mail.dat or Mail.XML may be used for mailings of 10,000 pieces or more
- Postal Wizard may be used for mailings of less than 10,000 identical-weight pieces
- Intelligent Mail for Small Business (IMsb) Tool may be used for mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually

Mail.dat and Mail.XML do require TEM testing if Mail Owners and Mail Service Providers are not using vendor approved software that has been validated for eDoc and Full-Service with the Postal Service. Postal Wizard and IMsb do not

require TEM testing. Talk to your service provider to understand the different options available.

In order to submit a Mail.dat file in the TEM environment, you must first download the TEM Mail.dat client. The Mail.dat client is used to send mailing data files to *PostalOne!.* To download the TEM Mail.dat client, select "Mailing Services" on the Welcome page and then, under the Electronic Data Exchange header, select "Go To Service".

Download the Mail.dat client by selecting the Download Client Application (Windows) link located in the Mail.dat Support for Test Environment for Mailers (TEM) area. Save the DRClient~win32~TEM.zip file to your computer. Right-click on the downloaded zip-file and "extract all" to unzip the files.

Open the Client by selecting the *run-mdclient.bat* link within the folder that has been downloaded. Enter the appropriate log-in information on the Client's Sign In screen. This is the same user name and password that you use to log into the BCG. Once the Mail.dat client has been installed, you can upload a Mail.dat file to TEM.

Upload the desired job by first selecting the Job Validation/Upload link. Select the "Add Jobs" link. Search for the desired job and select "Open".

TEM Submission – Upload the Mail.dat job

Select the Upload after validation radio button and then select "Validate and Upload".
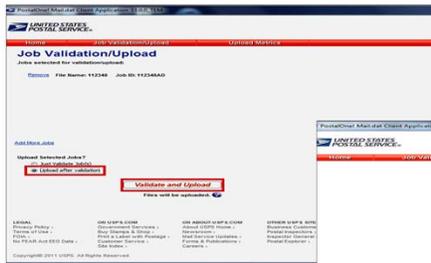
Select "Accept Agreement".

Once the job has finished processing through the Client, select the "View. Validation/Upload" history link in order to view the job's results.
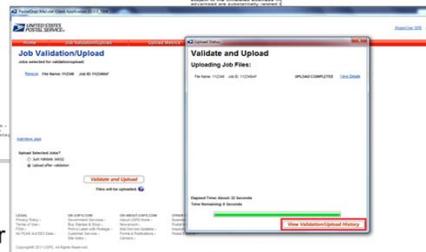
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Select the Upload after validation radio button and then select "Validate and Upload". Select "Accept Agreement". Once the job has finished processing through the Client, select the "View. Validation/Upload" history link in order to view the job's results.

TEM Submission – Upload the Mail.dat job

On the proceeding screen, select appropriate criteria range for the Date Filter

Select the checkboxes next to all of the relevant CRIDs. Select the "Submit" link at the bottom of the screen. Any relevant job matching the specified search criteria will now appear.

If the job has any Client or Server Validation Errors, it will be displayed in the field illustrated here.

On the proceeding screen, select appropriate criteria range for the Date Filter. Select the checkboxes next to all of the relevant CRIDs. Select the "Submit" link at the bottom of the screen. Any relevant job matching the specified search criteria will now appear. If the job has any Client or Server Validation Errors, it will be displayed in the field illustrated here.

In order to submit a Mail.XML file in the TEM environment, you must first download the Mail.XML WDSL files. WSDL files are utilized for .XML software developed by the Mailer to know how .XML messages should be defined and sent.

To download the Mail.XML WSDL files on the BCG Welcome page, select "Mailing Services."   Then select "Electronic Data Exchange". Under the Test Environment for Mailers, Mail.XML header, select "Download Mail.XML WSDL files."

TEM Mail.dat files are uploaded via the TEM Mail.dat client. Mail.XML files are submitted using the WSDL files. To upload Mail.dat files:

- Create your Mail.dat Full-Service mailing job using your software

- Open the Mail.dat client and upload your job for submission

- If your file passes the initial validations it will automatically upload. If your file does not pass all validations, you will need to make corrections before uploading your file.

To upload Mail.XML files:
- Create your Mail.XML Full-Service messages using your software.

- Send messages to the *PostalOne!* system

- Receive status message(s) from USPS with Accept or Reject status

Additional information on the TEM process and how to submit files to TEM can be found on RIBBS.usps.gov→Certifications→eDoc & Full-Service with links on:

- How to submit Mail.dat files to TEM

- How to submit Mail.XML files to TEM

- TEM Process for Mailings Using Mail.dat or Mail.XML
- TEM Process for Mailings using Software Not Tested

Once the Mail.dat or Mail.XML file(s) have been successfully uploaded, Mailers may review the TEM mailing job. Log into the BCG, click on "Mailing Services" and then select "Go To Service" under the Electronic Data Exchange header.

Review the Mailing Job in TEM

Links are provided for both Mail.dat and Mail.XML TEM environments to review postage statements, qualification reports and other mailing documentation.

Links are provided for both Mail.dat and Mail.XML TEM environments to review postage statements, qualification reports and other mailing documentation. You will notice that the TEM environment options are located toward the bottom of the page while the Production environment options are located toward the top. Under the Test Environment for Mailers (TEM) header (towards the bottom of the page), under the appropriate Mail.dat or Mail.XML section, select the "Go to TEM" link. You will see a notification message stating you are being directed to the TEM environment. Click "OK."

Review the Mailing Job in TEM

A red banner at the top of the pages confirms, "You are in the Test Environment for Mailers (TEM)".

Click on the "Dashboard" link

A red banner at the top of the pages confirms, "You are in the Test Environment for Mailers (TEM)". Click on the "Dashboard" link

Review the Mailing Job in TEM

Enter the criteria in the Dashboard search to view the corresponding postage documentation.
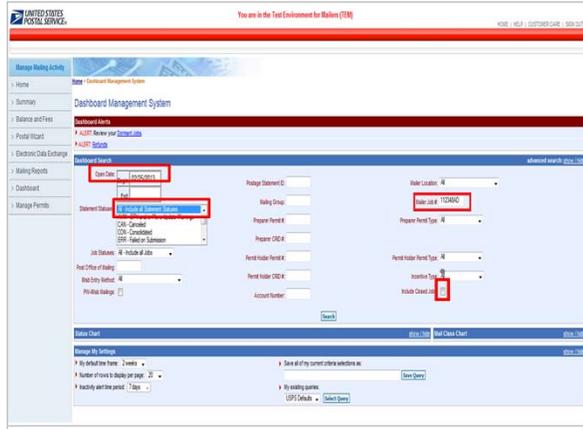
In the Dashboard Search:
• Ensure the Open Date begins on or before your job submission date.
• Make sure "All – Include All Statement Statuses" is highlighted.
• Enter your mailing job ID in the Mailer Job # field.
• Check the "Include Closed Jobs" box
• Click Search.

Search results should display your Job ID.

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Enter the criteria in the Dashboard search to view the corresponding postage documentation. In the Dashboard Search:

• Ensure the Open Date begins on or before your job submission date.

• Make sure "All – Include All Statement Statuses" is highlighted.

• Enter your mailing job ID in the Mailer Job # field. If you don't know the job ID, you may leave it blank. Entering the job ID helps you to access the specific information quicker.

• Check the "Include Closed Jobs" box to ensure inclusion of all jobs belonging to mailers using optional procedures.

• Click Search.

Search results should display your Job ID.

Open the job's postage statement by selecting the job's Postage Statement ID. The job's postage statement will appear. Note the legend at the top denoting the abbreviations used in the Postage Statement ID column. [F} denotes Full-Service statements.

What you see in on your postage statement will depend on what resides in particular fields in your eDoc. The mail preparer and mail owner are identified in different fields in the Mail.dat and Mail.XML specifications, but the same type of information is populated regardless of the type of electronic documentation. This information feeds the Postage Statement.

Something to note:

Today, Full-Service By/For identification and postage statement Mailing Agent and Mail Owner identification are derived from different fields in the Mail.dat or Mail.XML file. The By/For information submitted in the file for Full-Service is not always visible on the postage statement. (This will be changed in a future release so that Full-Service By/For and postage statement By/For are derived from the same fields.)

Postage statement population:

Files submitted with Mail.dat & Mail.XML populate the mail owner field on the postage statement with the information populated for the Mail Owner Permit. Mail Owner MID and CRID are not currently used for Mail Owner postage statement display.

In a future release the logic in PostalOne! will be updated so that the mail owner field is populated the same way as Full Service, utilizing the Owner MID, Mail Owner CRID, or the Mail Owner Permit.

Compare the electronic postage statement information displayed on the dashboard with the values used to populate the Mail.dat or Mail.XML file submitted.

If any of these three fields, are not displaying the correct information, work with your Mail.dat or Mail.xml software provider to address the issue.

Full-Service By/For feedback is provided to the mailer through the Mailer Scorecard. The system creates a mailer's scorecard by compiling the information on all jobs presented by the eDoc submitter over the past 30 days. The quality of the By/For information of the eDoc submitter is evaluated based on the this 30 day period. By/For information is NOT required for Full-Service mailings for a Mail Owner that represents less than 5,000 pieces in that mailing.

An overview of the mailers scorecard will be covered later in this presentation.

Webinars designed to assist Mail Owners and Mail Preparers in accessing and understanding the scorecard are available, and will be covered at the end of this presentation.

Compare the qualification report displayed with the Mail.dat or Mail.XML file submitted. Total pieces and presort should be the same. Click on the "Job ID" link to locate the qualification report. Click on "Qualification Report(s)" link to locate the qualification report. The qualification report will appear.

Access the Reconciliation Report to view the total pieces and postage. Click on the "Job ID" link. Click on the "Reconciliation Report" link. The reconciliation report will appear.

Reminder on the TEM Environment

- Remember that if you are using vendor approved software you don't need to use TEM
- If you are required to use TEM, once you complete the TEM process, inform your BMEU that you are going to Full-Service. Then submit your files to production

Type of Mailer	Required to use TEM?
Mail Owners and Mail Service Providers <u>using vendor approved software</u> that has been validated for eDoc and Full-Service with the Postal Service	No
Mail Owners and Mail Service Providers <u>not using vendor approved software</u> that has been validated for eDoc and Full-Service with the Postal Service	Yes

The Test Environment for mailers (TEM) is designed to simulate your live mailing environment so that the user experience in TEM is reflective of production functionality. Remember that if you are using vendor approved software you don't need to use TEM. If you are required to use TEM, once you complete the TEM process, inform your BMEU that you are going to Full-Service. Then submit your files to production

The process for submitting Mail.dat files in production closely mirrors the TEM process. In order to submit a Mail.dat file in the production environment, you must first download the <u>production</u> Mail.dat client. To download the production Mail.dat client, select "Mailing Services" on the Welcome page and then, under the Electronic Data Exchange header, select "Go To Service".

Production Submission – Mail.dat

Download the Mail.dat client by selecting the Download Client Application (Windows) link located in the Mail.dat Support for Test Environment for Mailers (TEM) area.

Save the **MDRClient~win32~PROD.zip** file to your computer. Right-click on the downloaded zip-file and "extract all" to unzip the files.

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Download the Mail.dat client by selecting the Download Client Application (Windows) link located in the Mail.dat Support for Test Environment for Mailers (TEM) area. Save the MDRClient~win32~PROD.zip file to your computer. Right-click on the downloaded zip-file and "extract all" to unzip the files.

Once the Mail.dat client has been installed, you can upload a Mail.dat file to production. Open the Client by selecting the *run-mdclient.bat* link within the folder that has been downloaded. Enter the appropriate log-in information on the Client's Sign In screen. This is the same user name and password that you use to log into the BCG.
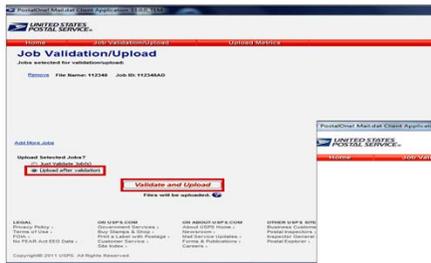
Upload the desired job by first selecting the Job Validation/Upload link. Select the "Add Jobs" link. Search for the desired job and select "Open".

Select the Upload after validation radio button and then select "Validate and Upload". Select "Accept Agreement". Once the job has finished processing through the Client, select the "View. Validation/Upload" history link in order to view the job's results.

Production Submission – Upload the Mail.dat job

On the proceeding screen, select appropriate criteria range for the Date Filter

Select the checkboxes next to all of the relevant CRIDs. Select the "Submit" link at the bottom of the screen. Any relevant job matching the specified search criteria will now appear.

If the job has any Client or Server Validation Errors, it will be displayed in the field illustrated here.

Production
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On the proceeding screen, select appropriate criteria range for the Date Filter. Select the checkboxes next to all of the relevant CRIDs. Select the "Submit" link at the bottom of the screen. Any relevant job matching the specified search criteria will now appear. If the job has any Client or Server Validation Errors, it will be displayed in the field illustrated here.

Similar to the TEM environment, to submit a Mail.XML file in the production environment, you must first download the production Mail.XML WSDL files. To download the Mail.XML WSDL files on the BCG Welcome page, select "Mailing Services." Under the "Electronic Data Exchange" header select "Go To Service". Go to the "Mail.dat Support for Production"→"Mail.XML" header→ select "Download Mail.XML WSDL files."
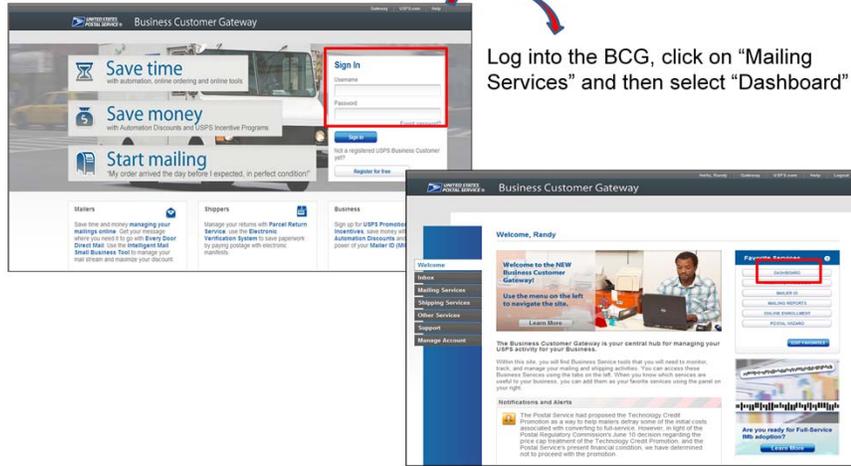
Review the Mailing Job - Production

Once the Mail.dat or Mail.XML file(s) have been successfully uploaded, Mailers may review the production mailing job.

Log into the BCG, click on "Mailing Services" and then select "Dashboard"

Can also access from the DasOnce the Mail.dat or Mail.XML file(s) have been successfully uploaded, Mailers may review the production mailing job.   Log into the BCG, click on "Mailing Services" and then select "Dashboard".

Review the Mailing Job - Production

Once at this screen, follow the same steps that were outlined in the TEM environment to view mailing reports corresponding to the jobs that were submitted.

In the Dashboard Search:
- Ensure the Open Date begins on or before your job submission date.
- Make sure "All – Include All Statement Statuses" is highlighted.
- Enter your mailing job ID in the Mailer Job # field.
- Check the "Include Closed Jobs" box
- Click Search.

Search results should display your Job ID.

Once at this screen, follow the same steps that were outlined in the TEM environment to view mailing reports corresponding to the jobs that were submitted. In the Dashboard Search:
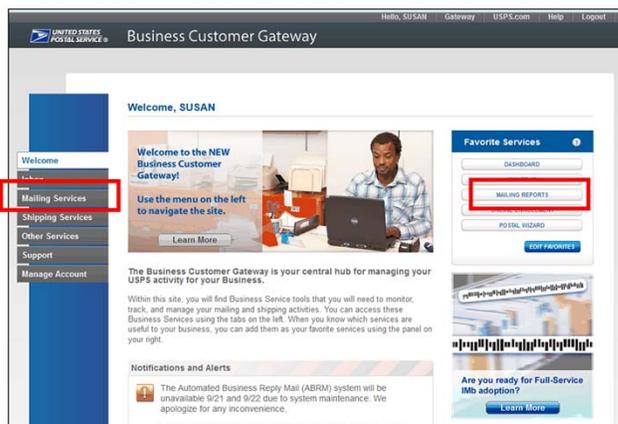
- Ensure the Open Date begins on or before your job submission date.

- Make sure "All – Include All Statement Statuses" is highlighted.

- Enter your mailing job ID in the Mailer Job # field. If you don't know your Mailer Job #, leave it blank. This field allows you to go directly to the information for which you are looking.

- Check the "Include Closed Jobs" box

- Click Search.

Search results should display your Job ID.

Similar to the TEM environment, within the production environment, Mailers can view postage statements, qualification reports and other mailing documentation.

Full-Service reports can be accessed through the Welcome page of the BCG by clicking on "Mailing Services" on the left or by accessing "Mailing Reports" under Favorite Services.

To monitor Balances & Fees associated to permit or publication accounts, under "Mailing Services" select Balance and Fees "Go To Service"

The Mailing Reports Page has links to several reports for feedback and data quality. Let's first look at the Mailer Scorecard, which includes information on the status of the mailing quality of the Full-Service mailing.

Reports – Mailer Scorecard

The Mailer Scorecard provides a dashboard view summarizing performance, allowing comparisons across facilities. It is available for any mailer submitting eDoc.

Mailer Scorecard — SEPTEMBER 2013

Verifications

| Mailer Profile | Full-Service Electronic | eInduction | Seamless | Manual Sampling | Er |

◉ # Metrics   ◉ # Trending   ◉ % Metrics   ◉ % Trending

Full-Service Electronic

eDoc Submitter	Total	20169446 Chicago Mailing Company	20170530 Presort Mailing, LLC
# Containers	8	8	0
# Handling Units	198	0	198
# Pieces	10,110	282	9,828
# Full-Service Pieces	10,110	282	9,828
# OCI Errors	0	N/A	0
# MID Container Errors	8	8	N/A
# MID HU Errors	66	N/A	66
# MID Piece Errors	6,670	282	6,388
# STID Errors	282	282	0
# By/For Errors (All)	13,668	564	13,104
# By/For Invalid Errors	13,104	0	13,104
# By/For Matching Errors	282	282	0
# By/For Mail Owner Identified as MSP Errors	282	282	0
# Barcode Uniqueness Container Errors	0	0	N/A
# Barcode Uniqueness HU Errors	66	N/A	66
# Barcode Uniqueness Piece Errors	470	282	188
# Entry Facility Container Errors	0	0	N/A
Additional Postage Due (Full-Service Electronic)	$1,199.41	$143.17	$1,056.24
# Early Scheduled Ship Date Warnings	0	N/A	N/A
# CSA Container Warnings	0	0	N/A
# DMU Verified USPS Transported Containers	0	0	0
# Default Tray Barcode Warnings	0	0	0

□ **Changes in metrics since previous month are highlighted**
  - **Green:** metric has improved by more than 5%
  - **Red:** metric as declined by more than 5%
  - **Yellow:** metric exceeds USPS threshold

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The Mailer Scorecard is available to both internal and external users and provides a summary of key quality information about a customers' mail performance.

Another feature of Mailer Scorecard is the display of color-coded values. If a value is displayed in "green", this means that the monthly performance within a metric has improved by more than 5%. If the value is displayed in "red", the monthly performance within the metric has declined by more than 5%. If the value is displayed in "yellow", the monthly performance exceeds a USPS threshold.

Mailers have access to the Mailer Scorecard and can view only for mailings they have submitted.

This data is informational only, until July 2014.

There are many Full-Service reports available. Today we will just focus on four of them. More detailed information on the Full-Service reports will be presented in the Full-Service feedback training. Here we just provide an overview of each the four reports we will focus on for the remainder of our training.

Start-the-Clock - A delivery service performance measurement that begins when a mailer or mail service provider turns the mail over to the USPS. Mailers can use Start-the-Clock information to anticipate when their mail will be delivered

Container, Tray and Bundle Scan Reports This data allows mailers to view scans as containers, trays and bundles are moved through the USPS mail stream. Mailers can use this data to anticipate when their mail will be delivered or issues encountered during processing

Change of Address ACS - This data can be used to determine when a mailpiece has been sent to an invalid address Change of Address (COA) detail records provide new and old address information so a mailer can update their mailing list

Nixie- This data can be used to determine when a mailpiece has been sent to an invalid address.

To access the Data Distribution/Informed Visibility Dashboard reports, click on the link under the Full-Service header.

Clicking Data Distribution/Informed Visibility Dashboard displays a dashboard with links to feedback information. Let's first take a look at the Full-Service Start-the-Clock report.

Full-Service Start-the-Clock Report

The BCG system displays the Full-Service Start-the-Clock Summary as an online report.

A delivery service performance measurement that begins when a mailer or mail service provider turns the mail over to the USPS. Mailers can use Start-the-Clock information to anticipate when their mail will be delivered. Some of the information that is contained in the Start-the-Clock report is the Job ID/Mailing Group ID, Appt ID which is the FAST Appointment ID, Entry Point Type (for example Drop Ship), Facility and Start-the-Clock date within the report. The BCG system displays the Full-Service Start-the-Clock Summary as an online report.

Container, Tray and Bundle Scan data allows mailers to view scans as containers and trays are moved through the USPS mail stream. Scan events are captured as USPS accepts and processes mail that includes IMcb (Intelligent Mail container barcode) or IMtb (Intelligent Mail tray barcode). Mailers can use scan data to anticipate when their mail will be delivered or issues encountered during processing. The anticipated delivery information can help mailers make decisions such as call center staffing levels.

Full-Service container scan data is available in an online report or through electronic data interchange in XML format.

This data can be used to determine when a mailpiece has been sent to an invalid address. Change of Address (COA) detail records provide new and old address information so a mailer can update their mailing list. This data can be used to determine when mailpieces are being sent to a recipient who has triggered an address change which reduces time in updating the mailer's address list.

Nixie Report

This data can be used to determine when a mailpiece has been sent to an invalid address

OriginalIMB
400928999990000087088640688848701

OnPieceCityStateZip
LIBERTY MO 64068

ParsedAddressOnPiece
1901   CLAY WOODS   PKWY

ReasonCode
Q

	OriginalIMB	RecordCreationDate	ActionCode	ParsedAddressOnPiece			OnPieceCityStateZip	ReasonCode	ClassNotificationType	FeeNotification
2	400928999990000087088640688848701	02/14/2013 00:00:00	W	1901	CLAY WOODS	PKWY	LIBERTY MO 64068	Q	C	No
3	002438999991869689553030841399	02/14/2013 00:00:00	W	116	PONCE DE LEON	AVE NE	ATLANTA GA 30308	Q	C	No
4	002438999991870417287737586061 0	02/13/2013 00:00:00	W	10810	SPRING CYPRESS	RD	TOMBALL TX 77375	I	C	No
5	002438999991870464277871710223 6	02/13/2013 00:00:00	W	13425	RANCH ROAD 620	N APT	AUSTIN TX 78717	Q	C	No
6	002438999991870404077707068107 2	02/13/2013 00:00:00	W	7700	WILLOW CHASE	BLVD APT	HOUSTON TX 77070	Q	C	No
7	002438999991870395977703022109 9	02/13/2013 00:00:00	W	1020	HOLCOMBE	BLVD	HOUSTON TX 77030	I	C	No
8	002438999991870320757413736879 9	02/13/2013 00:00:00	W	9311	S COLLEGE	AVE	TULSA OK 74137	I	C	No
9	002438999991870272976683905141 4	02/13/2013 00:00:00	W	514	PO BOX		NEW STRAWN KS 66839	Q	C	No
10	002438999991870247026407976179 1	02/13/2013 00:00:00	W	2900	WILLIAMSBURG	TER APT	PLATTE CITY MO 64079	Q	C	No
11	002438999991870108165031532071 4	02/13/2013 00:00:00	W	1800	WATROUS	AVE APT	DES MOINES IA 50315	Q	C	No
12	002438999991869646637212550119	02/13/2013 00:00:00	W	1719	BEECHWOOD	AVE	NASHVILLE TN 37212	I	C	No
13	002438999991869646437212291901	02/13/2013 00:00:00	W	1208	16TH	AVE S APT	NASHVILLE TN 37212	I	C	No
14	002438999991869591237128485250	02/13/2013 00:00:00	W				37128	I	C	No
15	002438999991869528237042158484	02/13/2013 00:00:00	W				37042	Q	C	No
16	002438999991869526337042568394	02/13/2013 00:00:00	W	3366	DURRETT	DR APT	CLARKSVILLE TN 37042	Q	C	No
17	002438999991869069334428380620	02/13/2013 00:00:00	W	520	NW7TH	AVE	CRYSTAL RIVER FL 34428	M	C	No
18	002438999991869884673391366677 6	02/13/2013 00:00:00	W	10710	RAVENNA	WAY UNIT	FORT MYERS FL 33913	Q	C	No
19	002438999991869884573391366509 9	02/13/2013 00:00:00	W	10112	COLONIAL COUNTRY CLUB	BLVD	FORT MYERS FL 33913	I	C	No
20	002438999991869879333845059393	02/13/2013 00:00:00	W	593	PO BOX		HAINES CITY FL 33845	Q	C	No
21	002438999991869821933330527221 9	02/13/2013 00:00:00	W	2419	FRYER	PT	FORT LAUDERDALE FL 33305	A	C	No
22	002438999991869820153319333679 9	02/13/2013 00:00:00	W	15635	SW74TH CIRCLE	DR	MIAMI FL 33193	I	C	No
23	002438999991869817553183183933	02/13/2013 00:00:00	W	13785	SW66TH	ST APT	MIAMI FL 33183	V	C	No
24	002438999991869814203317573749 9	02/13/2013 00:00:00	W	2055	SW122ND	AVE	MIAMI FL 33175	I	C	No

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This data can be used to determine when a mailpiece has been sent to an invalid address which reduces time in updating the mailer's address list

Note: Here are the meanings of the Reason Codes:

A = Attempted – Not Known

B = Returned for Better Address

D = Outside Delivery Limits

E = In Dispute

I = Insufficient Address

L = Illegible

M = No Mail Receptacle

N = No such number

P = Deceased

Q = Not Deliverable as Addressed/ Unable to Forward

R = Refused

S = No Such Street

U = Unclaimed

V = Vacant

X = No Such Office

Additional Resources

- For additional information:
  - BCG & MSP Training
    - https://ribbs.usps.gov/index.cfm?page=intellmailgateway
  - Contact the Help Desk
    - 800-522-9085
    - postalone@usps.gov
  - Support Page
    https://gateway.usps.com/eAdmin/view/support

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For additional information including detailed BCG training, go to the RIBBs website, click on the Intelligent Mail link and click on Business Customer Gateway to access the presentations. The Help Desk can also be contacted by calling 800-522-9085 or sending an email to postalone@usps.gov. Additional information is also available on the support page of the Business Customer Gateway.

Upcoming Webinars

The United States Postal Service is offering a series of webinars designed to assist Mail Owners and Mail Preparers in moving to Full-Service. The webinars will be offered thru January 2014. Webinar information is posted on the RIBBS website at : https://ribbs.usps.gov/index.cfm?page=intellmailpresentations

Topic	Dates	Description
Full-Service Open Line Calls	• **Wednesdays 2:00 pm EDT**	USPS representatives will be online to answer any questions related to Full-Service Intelligent Mail. Phone in at (866) 966-6305 or log on at http://meetingplace4.usps.gov/join.asp?0602495
Getting Started with Full-Service	• **December 3, 2013, 1:30 EDT** • **January 7, 2014, 1:30 pm EDT**	To assist customers in transitioning to Full-Service Intelligent Mail, this course provides an overview of Full-Service. Topics include the requirements for Full-Service Intelligent Mail; the technologies available to submit mailing information electronically; software solutions available to help make the transition; tips on how to sign up, get an account, and acquire a Mailer ID; and the benefits of Full-Service.
Full-Service MIDs and CRIDs	• **December 10, 2013, 1:30 pm EDT** • **January 9, 2014, 1:30 pm EDT**	This webinar will focus on Customer Registration IDs (CRIDs) and Mailer IDs (MIDs) as they are used in Full-Service. Topics include the multiple ways for Mail Owners and Mail Preparers to obtain MIDs and CRIDs and how MIDs and CRIDS are used in the Intelligent Mail barcode, in electronic mailing information and for receipt of Full-Service data.
The Business Customer Gateway	• **December 12, 2013, 1:30 pm EDT** • **January 14, 2014, 1:30 pm EDT**	The Business Customer Gateway provides a single entry point for USPS online business services. This webinar will highlight those features of the newly designed Business Customer Gateway that are especially useful to Full-Service mailers. These features include a new simplified registration process, the ability to request MIDS, links to submit electronic documentation, and access to reports providing feedback on mailings.
Full-Service Feedback	• **December 10, 2013, 1:30 pm EDT** • **January 31, 2014, 1:30 pm EDT**	Full-Service Feedback is available to all mailers preparing and presenting Full-Service mail. The Postal Service conducts in-depth analysis of Full-Service electronic documentation data and presents the results through reports such as the Mailer Scorecard. Learn how to use these reports to measure the quality of your Full-Service mailings.

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The United States Postal Service is offering a series of webinars designed to assist Mail Owners and Mail Preparers in moving to Full-Service. The webinars will be offered through January 2014. A few of the dates are listed here. Webinar information is posted on the RIBBS website at the address shown here: [**Note to Presenter:** Do not read web address aloud] https://ribbs.usps.gov/index.cfm?page=intellmailpresentations

A Full-Service Open-Line call is scheduled for every Wednesday from 2:00 PM to 3:00 PM Eastern. USPS representatives will be online to answer any questions related to Full-Service Intelligent Mail. Phone in at (866) 966-6305 or log on at the web address shown here: [**Note to Presenter:** Do not read web address aloud] http://meetingplace4.usps.gov/join.asp?0602495

The first webinar in the series is on Getting Started with Full-Service. To assist customers in transitioning to Full-Service Intelligent Mail, this course provides an overview of Full-Service. Topics include the requirements for Full-Service Intelligent Mail; the technologies available to submit mailing information electronically; software solutions available to help make the transition; tips on how to sign up, get an account, and acquire a Mailer ID; and the benefits of Full-Service.

The next webinar in the series is titled Full-Service MIDs and CRIDs. This webinar will focus on Customer Registration IDs (CRIDs) and Mailer IDs (MIDs) as they are used in Full-Service. Topics include the multiple ways for Mail Owners and Mail Preparers to obtain MIDs and CRIDs and how MIDs and CRIDS are used in the Intelligent Mail barcode, in electronic mailing information and for receipt of Full-Service data.

A third webinar is on The Business Customer Gateway, which provides a single entry point for USPS online business services. This webinar will highlight those features of the newly designed Business Customer Gateway that are especially useful to Full-Service mailers. These features include a new simplified registration process, the ability to request MIDS, links to submit electronic documentation, and access to reports providing feedback on mailings.

The final webinar in this series deals with Full-Service Feedback, which is available to all mailers preparing and presenting Full-Service mail. The Postal Service conducts in-depth analysis of Full-Service electronic documentation data and presents the results through reports such as the Mailer Scorecard. Learn how to use these reports to measure the quality of your Full-Service mailings.

Questions