MSP Incentive Programs Guide

May 17, 2012
Version 2

Document Change History

Initial version (2.0) of the MSP Incentive Programs Guide.

Section	Title	Description
3.0, 3.1	eDoc Enrollment	Revised MSP eDoc enrollment process language. Mail Owners will dynamically be enrolled.
3.2	Enrollment and eDoc Submission Scenarios	Based on Revised MSP eDoc enrollment process that Mail Owners will dynamically be enrolled: Corrected Table 2 Corrected scenarios

Initial version (1.0) of the MSP Incentive Programs Guide.

Section	Title	Description
All	Incentive Programs Enrollment Guide	Initial Draft

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1. Introduction

Customers interested in participating in USPS incentive programs must register, specify which permits and Customer Registration ID (CRID) will be participating in the promotion and agree to promotion terms. We recommend that customers register at least 24 hours prior to presenting the first qualifying mailing to account for any contingency. Our systems will process enrollment records on an hourly batch process.

There are two methods to register for the Mobile Commerce promotion that is described in this document. The recommended method for all customers is to register online via the Business Customer Gateway (BCG), Incentive Program service (gateway.usps.com). The alternate method is using Mail.dat and Mail.XML electronic documentation (eDoc) submissions. This method is geared for the mail service provider. Both methods will be functional on June 10, 2012, upon the *PostalOne!* Release 31 deployment.

Mail Service Provider (MSP) online registration for the Mobile Commerce and Personalization Promotion begins June 10, 2012 through the Business Customer Gateway (BCG). The term MSP is interchangeable with mailing agent and mail preparer. While the BCG system allows customers MSPs to enroll now, we recommend that MSPs enroll on or after June 10th. If you are an MSP and register prior to June 10th, you will need to log on to the BCG/Incentive Programs before the promotion start date of July 1, 2012 to identify yourself as a Mail Service Provider. If you are an MSP and will submit your own mailings, you must also select the MSP designation on June 10th.

Enrollment identification as an MSP is essential to the *PostalOne!* system validations. As part of the MSP enrollment process, you will have the option to enroll all or any combination of your Customer Registration IDs (CRID) and permits that are linked to those CRIDs. The CRIDs that you enroll are the CRIDs you must use in the eDoc "By" field. The *PostalOne!* system will validate that the CRID of the preparer is a registered MSP when an incentive is being claimed. When a CRID is recognized as an MSP CRID, the *PostalOne!* system will invoke the dynamic enrollment feature and enroll the Mail Owner, associated to the Mail Owner CRID in the eDoc (in scenarios where the Mail Owner has not already enrolled itself).

The Mail.dat and Mail.XML eDoc submissions by Mail Service Provider customers, enables an MSP who is paying for the mailing to simultaneously submit electronic postages statements to claim the incentive and enroll their customers in the incentive program who are part of that mailing. This eDoc enrollment still requires an MSP to register online through the BCG, Incentive Program service.

1.1   About this Guide

This guide focuses on the MSP online enrollment process; describes how permit numbers, CRIDs and MIDs affect enrollment; and gives specific details on the electronic documentation requirements. Also included are pointers and additional information regarding common questions and troubleshooting.

The guide is organized as follows:

- Section 2: Permit Numbers, Mailer IDs and Customer Registration IDs (CRIDs)
- Section 3: eDoc Enrollment
- Section 4: Online Enrollment
- Section 5: Frequently Asked Questions
- Section 6: Troubleshooting

1.2   Finding Information

The following documentation may also useful and provide up to date information.

- Mobile Commerce and Personalization Promotion documentation on RIBBS
  https://ribbs.usps.gov/index.cfm?page=mobilebarcode

- June 2012 Release 31 Postal Service Technical Specifications
  https://ribbs.usps.gov/intelligentmail_schedule/documents/tech_guides/june2012/techspecs.htm

- June 2012 *PostalOne!* Release Notes
  https://ribbs.usps.gov/intelligentmail_schedule/documents/tech_guides/june2012/docs/releasenotes/PostalOneReleaseNotes31.pdf

- Incentive Programs Service User Guide (for Mail Owners)

  https://ribbs.usps.gov/mobilebarcode/documents/tech_guides/IncentiveProgramsEnrollmentGuide.pdf

- Business Customer Gateway User Access Guides
  https://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/user_access/user_access.htm

1.3   Additional Assistance

For Business Customer Gateway enrollment assistance contact the *PostalOne!* Help Desk at (800) 522-9085 or postalone@email.usps.gov.

Promotion related questions about can be directed to USPS Program Office at: mobilebarcode@usps.gov.

1.4   Key Terminology

Business Customer Gateway (BCG): Web portal for USPS® business services http://gateway.usps.com

Customer Registration ID (CRID): A unique business ID for a company address at a physical address. A CRID is automatically assigned when you register a new business location.

Business Service Administrator (BSA): An individual that can approve or deny a user's access to participate in services on behalf of a company. The first person to request access to a service from your company will be prompted to become the BSA. In order to gain access to the Incentive Programs service someone must assume the BSA role.

Mail Service Provider (MSP): company or entity that performs one or more of the following functions on behalf of other companies or organizations: designs, creates, prepares, processes, sorts, or otherwise prepares postcards, letters, flats or packages for acceptance and delivery by the Postal Service.

2. CRIDs, Permits and MIDs

At the top of the data structure hierarchy is the CRID. A permit and/or MID will map to one CRID. When you enroll your CRID into the incentive program, you are in effect enrolling the permits that are linked to that CRID. You will want to enroll all CRIDs for which there are eligible permits you plan to use for the promotion. If CRIDS are missing or if there are additional ones you should add them. You can do so using existing BCG functionality.

For each CRID that you enroll in an incentive program, the system will only display permits that you own and that are eligible for the promotion. Enrolling your permits mean that if you plan to identify your permit in

the eDoc to pay for the mailing (and hence get the discount), the system will recognize the permit as enrolled and calculate the discount.

Encourage your customers to log on to the BCG and enroll their CRIDs for the incentive program. Tip: For your customers to simply obtain a CRID, they need only sign-up for a business account. They can then pass this CRID on to you for you to identify them in the eDoc. See the next section to obtain your customer's CRID if you only know their MID.

For your customers who do not enroll using the BCG, the alternative is for you to use the eDoc enrollment feature, but this requires that you know your customer's CRID (USPS mail owner). You must populate the Mail Owner's CRID in the eDoc. Your customers' CRID must be linked to their permit that is called out in the eDoc. The first instance where you are submitting eDoc and enrolling your customer, and where this customer is paying for the mailing, the *PostalOne!* system will simultaneously enroll and calculate the discount for that Mail Owner permit. The *PostalOne!* system will calculate the discount toward your customer's permit only if you are enrolled as an MSP.

2.1   Acquiring Mail Owner CRID based on Mail Owner MID

The MID/CRID Program Management office processes manual data requests for bulk CRID-for-MID mapping, and during the incentive program will provide the corresponding CRID number for a MID. To receive a Mail Owner CRID based on a Mail Owner MID, you must provide MID(s) to the MID/CRID Program Management office. If the MID is valid, the corresponding CRID will be returned. Requests are processed on a first-come, first-serve basis. Response spreadsheets will be e-mailed back to the requester.

Create a spreadsheet listing the MIDs and send an email with the spreadsheet attached to PostalOneCCC@usps.gov. Include in Subject: "CRID/MID Incentive". For more information CRID for MID acquisitions, go to: https://ribbs.usps.gov/index.cfm?page=intellmailmailidapp

3.   eDoc Enrollment

The Mail.dat and Mail.XML eDoc submissions enable an MSP who is paying for the mailing to simultaneously submit electronic postages statements to claim the incentive and enroll their customers in the incentive program who are part of that mailing. You as an MSP must be completely enrolled in the incentive program via the Incentive Program online enrollment via the BCG, in order to enroll your customers using electronic documentation (eDoc). eDoc enrollment functionality requires that you use the customer's CRID of Mail Owner in the Mail.Dat MPA file to enroll your customers. Your customers' CRID must be linked to the permit being used for postage statement generation When you submit eDoc and identify your customer by CRID, the *PostalOne!* system will simultaneously enroll and calculate the discount for your customer's permit.

The MPA Permit Number in the eDoc designates the permit charged for the postage statement. When the fields for the mailing agent, owner and permit holder are required, these must be populated accordingly.

The CCR fields, when populated, trigger the *PostalOne!* system to perform the eDoc enrollment validations for the incentive program. If the Mail.dat CCR Characteristic Type field is I=Incentive and the CCR Characteristic field is a valid incentive code and the MSP (defined by CRID of Preparer field in MPA) has declared itself a MSP (through the Business Customer Gateway), the *PostalOne!* system for incentive-claimed mailings will attempt to create a client enrollment record based on the CRID of Mail Owner field in the MPA file for an incentive. *PostalOne!* will validate that the MSP is already enrolled as an MSP in the Incentive Program. In order to process any eDoc the CCR Characteristic Type field must be = I (or MB for 12-1), the system will require the By/For identification data elements; you must provide the CRID of Preparer field, and CRID of Mail Owner field in the MPA record or optionally, the Mail Owner MID MPA

record, or Mailer Owner MID CPT. If eDoc submissions do not meet these requirements a warning will be generated. In these instances, *PostalOne!* will process the eDoc (i.e., not reject the file) but the mailing will not receive the discount.

Typical warnings include: the CRID is not being valid, the CCR Characteristic Type field is not valid, the MSP CRID or Mail Owner CRID is not enrolled, or the CCR Characteristic Type field is valid but the incentive period does not coincide.

3.1   eDoc Required Data

The Component Characteristics Record file (CCR), characteristic value triggers the *PostalOne!* system to perform the incentive program validations. To claim and receive the Mobile Commerce Barcode promotion using Mail.dat 12-1, the CCR Characteristic value must be MB. MB is designated for the Mobile Interactive Barcode and so must be in the characteristic field in the CCR. If there is more than one Content of Mail record, the CCR record must at least contain the MB for Mobile Interactive Technology. For Mail.dat 12-2, the *PostalOne!* system will support the .CCR Characteristic Type field, supporting values: C = Content, I = Incentive or F = Fee. To claim and receive the Mobile Commerce Barcode promotion using Mail.dat 12-2, the value MI must be populated in the characteristic field in the CCR, when the Characteristic Type = I.

To claim and receive the Mobile Commerce Barcode promotion for Mail.XML, the Postage Statement messages must contain the value of "MI" in the Content field for Mail.XML 11.0D and in the Incentive field for Mail.XML 12.0A inside the MailCharacteristic block. For combined mail where the owner is identified, use the CustomerReferenceID to generate the postage statements so that all pieces on a postage statement have the mobile barcode.

The *PostalOne!* system for incentive-claimed mailings will not fail files; it will simply not apply the discount in the case where warnings are detected.

To claim the receive the Mobile Commerce Barcode discount for Precancelled and Meter mailings use the Incentive Postage affixed amount. Refer to Table 1 below. All discounts must be claimed at the time of mailing and cannot be rebated or refunded at a later date. Customers who wish to claim the incentive must affix the appropriate reduced promotion amount to the mailpiece. This translates into setting the electronic file, MPA Postage Payment Method to "M" for Metered "***Neither"*** because the pre-denominated amount is not the amount of postage affixed.

Processing Category	Incentive Postage Amount Affixed
First-Class Mail Cards	$0.20
First-Class Mail Letters auto and presort	$0.25
First-Class Mail NM Letters	$0.45
First-Class Mail Flats - auto and presort	$0.35
Standard Mail Regular Auto/PRSRT/CR Letters	$0.12
Standard Mail Regular Auto/PRSRT/CR Flats	$0.13
Standard Mail Nonprofit Auto/PRSRT/CR Letters	$0.05
Standard Mail Nonprofit Auto/PRSRT/CR Flats	$0.06

Table 1: Reduced Postage Amounts

The affixed prices for metered postage are for each piece for Standard Mail. For First-Class Mail flats, the amount in Table 1 is for the first ounce, and additional postage would have to be affixed for each additional ounce after the first ounce. For First-Class Mail letters, additional postage must be affixed for letters over two ounces.

Any net postage due for the mailing must be paid from an advance deposit (permit) account. You must have documentation (USPS Qualification Report) to support mail preparation and piece count to determine additional postage due.

For MSPs approved for Combined Value Added Refund or Value Added Refund mailings and who mark qualifying mailings as Metered *Neither*, any additional postage due will be reduced by the amount of the discount to be refunded. If the MPA Postage Payment Method is set to "C" for Metered Correct, the discount will be forfeited, because the system assumes that postage affixed is the correct published price (not the reduced promotion amount) and there is no postage due.

3.2   Enrollment and eDoc Submission Scenarios

The following scenarios describe the outcome when an MSP submits or prepares the eDoc. All scenario outcomes lead to payment of the discount if the MSP and your customers are enrolled via the BCG. If your customer (USPS Mail Owner) is not enrolled via the BCG and you are submitting the eDoc and your customer is paying for the mailing, the discount will be applied to your customer's permit if you identify your customer by CRID. The *PostalOne!* system checks all three possible paying permit fields –that the customer identified is enrolled (Mailing Agent, Mail Owner, and Permit Holder). Refer to Table 2 for summary of outcomes. Refer to individual scenario detail blocks below.

MSP Submits eDoc						
Scenario	Enrolled in BCG		eDoc Enrolled			Outcome	
	MO	MSP	MO	eDoc "For" MO Field	Permit Holder Permit in eDoc (Payee)	Discount Applied	Mailing Credited
1A	Yes	Yes	N/A	CRID	MO or MSP	Yes	MO
1B	Yes	Yes	N/A	MID	MO	Yes	MO
1C	Yes	Yes	N/A	MID	MSP	Yes	MSP
1D	Yes	No	No	CRID or MID	MSP	No [1]	
1E	Yes	No	No	CRID or MID	MO	Yes	MO
1F	Yes	As MO	N/A	CRID or MID	MO	Yes	MO
1G	Yes	As MO	N/A	CRID or MID	MSP	Yes	MSP
2A	No	Yes	Yes	CRID	MSP	Yes	MSP
2B	No	Yes	Yes	CRID	MO	Yes	MO
2C	No	Yes	No	MID	MSP	Yes	MSP
2D	No	Yes	No	MID	MO	No [1]	
2E	No	Yes	Yes if CRID	CRID or MID	MSP	Yes	MSP
2F	No	As MO	Yes if CRID	CRID or MID	MO	Yes	MO
2G	No	As MO	Yes if CRID	CRID or MID	MSP	Yes	MSP

[1] *PostalOne!* checks all three possible paying permit fields, verifying that the permit is enrolled. The discount will not be applied if the MSP submitting the eDoc is not enrolled in the Incentive Program via the BCG online enrollment process, or if the Mail Owner MID is used in "For" field.

MO = Mail Owner; MSP = Mail Service Provider

Table 2: eDoc Submission Scenarios

1. **MAIL OWNER IS ENROLLED**: Mail Owner (MO) enrolls on the Business Customer Gateway Incentive Tool (all CRIDs and permits are enrolled)

Scenario 1A:

MAIL SERVICE PROVIDER (MSP) SUBMITS MAIL FOR MAIL OWNER

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is enrolled (as MSP)
eDoc By/For Sections:	MSP uses MO **CRID** in the "for" section
Permit Holder (Payee):	MO or MSP is the payee
Outcome:	**Discount is applied**
	Mailing is attributed to the MO if Permit Holder (Payee)
	Mailing is attributed to the MSP if Permit Holder (Payee)

Scenario 1B:

MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is enrolled (as MSP)
eDoc By/For Sections:	MSP uses MO **MID** in the "for" section
Permit Holder (Payee):	MO is the payee
Outcome:	**Discount is applied (since MO is enrolled via BCG)**
	Mailing is attributed to the MO

Scenario 1C:

MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is enrolled (as MSP)
eDoc By/For Sections:	MSP uses MO **MID** in the "for" section
Permit Holder (Payee):	MSP is the payee
Outcome:	**Discount is applied**
	Mailing is attributed to the MSP

Scenario 1D:

MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is NOT enrolled
eDoc By/For Sections:	MSP uses MO **MID or CRID** in the "for" section
Permit Holder (Payee):	MSP is the payee
Outcome:	**Discount is not applied; MSP is not enrolled**

Scenario 1E:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is NOT enrolled
eDoc By/For Sections:	MSP uses MO **MID or CRID** in the "for" section
Permit Holder (Payee):	MO is the payee
Outcome:	**Discount is applied (since MO is enrolled via BCG)** **Mailing is attributed to the MO**

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Scenario 1F:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is enrolled (as Mail Owner)
eDoc By/For Sections:	MSP uses MO **MID or CRID** in the "for" section
Permit Holder (Payee):	MO is the payee
Outcome:	**Discount is applied (since MO is enrolled via BCG)** **Mailing is attributed to the MO**

Scenario 1G:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment:	MO is enrolled
MSP Enrollment:	MSP is enrolled (as Mail Owner)
eDoc By/For Sections:	MSP uses MO **MID or CRID** in the "for" section
Permit Holder (Payee):	MSP
Outcome:	**Discount is applied (since MSP is enrolled via BCG)** **Mailing is attributed to the MSP**

2. **MAIL OWNER IS NOT ENROLLED**: Mail Owner does not enroll on the Business Customer Gateway Incentive Tool but the MSP has enrolled.

Scenario 2A:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment:	MO is not enrolled
MSP Enrollment:	MSP is enrolled (as MSP)
eDoc By/For Sections:	MSP uses MO **CRID** in the "for" section
Permit Holder (Payee):	MSP is the payee
Outcome:	**Discount is applied if the MSP is fully enrolled.** **MO is auto-enrolled** **Mailing is attributed to the MSP**

Scenario 2B:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment: MO is not enrolled

MSP Enrollment: MSP is enrolled (as MSP)

eDoc By/For Sections: MSP uses MO **CRID** in the "for" section

Permit Holder (Payee):   MO is the payee

Outcome: **Discount is applied if the MSP is fully enrolled.**
                           MO is auto-enrolled
                           Mailing is attributed to the MO

Scenario 2C:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment: MO is not enrolled

MSP Enrollment: MSP is enrolled (as MSP)

eDoc By/For Sections: MSP uses MO **MID** in the "for" section

Permit Holder (Payee):   MSP is the payee

Outcome: **Discount is applied if the MSP is fully enrolled.**
                           MO is NOT auto-enrolled
                           Mailing is attributed to the MSP

Scenario 2D:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment: MO is not enrolled

MSP Enrollment: MSP is enrolled (as MSP)

eDoc By/For Sections: MSP uses MO **MID** in the "for" section

Permit Holder (Payee):   MO is the payee

Outcome: **Discount is at risk.**
                           MO is NOT auto-enrolled is MID is used

Scenario 2E:

<u>MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER</u>

MO Enrollment: MO is not enrolled

MSP Enrollment: MSP is enrolled (as Mail Owner)

eDoc By/For Sections: MSP uses MO **MID or CRID** in the "for" section

Permit Holder (Payee):   MSP is the payee

Outcome: **Discount is applied**
                           MO is NOT auto-enrolled if MID is used
                           MO is auto-enrolled if CRID is used
   **Mailing attributed to the MSP**

Scenario 2F:

MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER

MO Enrollment:	MO is not enrolled
MSP Enrollment:	MSP is enrolled (as Mail Owner)
eDoc By/For Sections:	MSP uses MO **MID or CRID** in the "for" section
Permit Holder (Payee):	MO is the payee
Outcome:	**Discount is applied (since MSP is enrolled via BCG)** **MO is NOT auto-enrolled if MID is used** **MO is auto-enrolled if CRID is used** **Mailing is attributed to the MO if CRID is used**

Scenario 2G:

MAIL SERVICE PROVIDER SUBMITS MAIL FOR MAIL OWNER

MO Enrollment:	MO is not enrolled
MSP Enrollment:	MSP is enrolled (as Mail Owner)
eDoc By/For Sections:	MSP uses MO **MID or CRID** in the "for" section
Permit Holder (Payee):	MSP is the payee
Outcome:	**Discount is applied (since MSP is enrolled via BCG)** **MO is NOT auto-enrolled if MID is used** **MO is auto-enrolled if CRID is used** **Mailing is attributed to the MSP**

4. Online Enrollment

4.1 New Business Customer Gateway (BCG) Users

If you are a new to the Business Customer Gateway, you must first create a business account.

1	→	**2**
Create Account Section 2.1.1		**Complete Existing User** Section 2.1.2
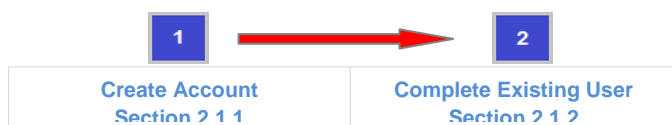
4.1.1 Create Account

4.1.1.1 Navigate to the BCG and click on 'New User Registration'
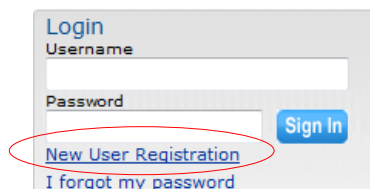
4.1.1.2 Follow the prompts by entering the required fields to create a new business account. You will receive an automatic email confirming that Your United States Postal Service Online Business Account has been activated.

4.1.2   Follow steps for Existing BCG Users

4.1.2.1 Go to the <u>Existing BCG Users</u> *section and follow those same steps.*

4.2   Existing Business Customer Gateway (BCG) Users

If you are already using the BCG, complete the four steps to enroll for an incentive program:

1	→	**2**	→	**3**	→	**4**
Request Incentive Programs		**Request Manage Mailing Activity** (if needed)		**Select an Incentive Program**		**Enroll**

4.2.1   Request Incentive Programs

1. Navigate to the BCG and sign in. **1**

2. Double click the Request Access link at the top of the page

3. Double click on Incentive Programs
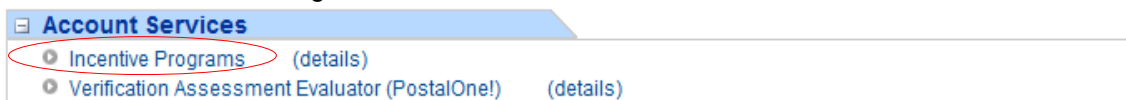
4. Verify all your Business Locations

Click on **Add Location** button to add additional locations if they are not displayed.

Note: When adding locations, enter the CRID if you know it. Otherwise enter the company and address information to get access to existing locations.

5. Select all your Business Locations

Click the check box for all business locations for which you would like to request access to the Incentive Programs module and then click the **Next >** button.

Note: Locations that don't get access to the Incentive Programs module will not be able to participate in any incentive programs. Make sure that you request access for all the business locations that you want participating.

6. Confirm your selection.

Verify the accuracy of your locations and click the **Confirm** button.

Note: It may save time to write down the CRIDs of any newly added locations

7. Become the Business Services Administrator (BSA) role for Incentive Programs ⓘ
> There must be a BSA for Incentive Programs in order to complete the enrollment. The individual who assumes the role will approve or deny who can access the incentive programs module on your company's behalf. To assume the BSA role, complete the following steps:

> → Review the USPS Online Agreement.
> → Select the checkbox to agree to the USPS Online Agreement.
> → Select the checkbox of the location(s) for which you want to become BSA.
> → Click on the [**Yes**] button.

> **Note:** Write down the CRIDs of your business locations should you need them for Step 2. You will receive an automatic email that the request for Incentive Programs and business location has been approved.

8. You are the BSA for Incentive Programs
> If you see the message shown below (Figure 1), skip step and go to Step 3: **Select an Incentive Program.**

> ## Business Service Administrator (BSA) Access Granted
> You have been granted BSA privileges for the following business location(s):

> **Figure 1 – BSA Access Granted**

> If you do not see the message from above (Figure 1), continue with the next step below to get access to the Manage Mailing Activity service. Go to Step 2 below to become the BSA for Manage Mailing Activity.

9. You need approval from the BSA for Manage Mailing Activity
> If you see the message shown below (Figure 2), go to Step 2: **Request Manage Mailing Activity** and follow all the steps. If you would like more information about why this step may be necessary, see items (1) and (2) of the FAQ sheet.

> ## Business Services Administrator Certification
> The services listed below require External BSA approval for BSA applications. Please refer to Request Status for information regarding the progress of your request submission.
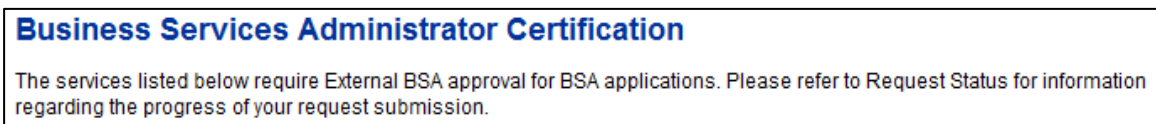
> **Figure 2 – BSA Certification Required**

4.2.2   Request Manage Mailing Activity [2]

If you do not already have access to the Manage Mailing Activity, double click the Request Access link at the top of the page. If you have access to Manage Mailing Activity, skip to Step 3: Select an Incentive Program.

1. Double click on Manage Mailing Activity

> **□ Track & Report**
> ○ Manage Mailing Activity   (details)

2. Repeat Steps 4, 5 and 6 above to request access to Manage Mailing Activity

If you added new locations for the Incentive Program service above, enter all of them for Manage Mailing Activity if you want the same access. Use the [Add Location] button to either enter the CRIDs of those existing locations or the exact company name and addresses as entered for the Incentive Program service.

3. Become the BSA for Manage Mailing Activity

There must be a BSA in place before you can enroll your business locations to Manage Mailing Activity. To become the BSA, complete the following:

→ Review the USPS Online Agreement.
→ Select the checkbox to agree to the USPS Online Agreement.
→ Select the checkbox of the location(s) for which you want to become BSA.
→ Click on the [Yes] button.

You are now the Manage Mailing Activity BSA for the selected locations. The locations you have selected have been enrolled for the Manage Mailing Activity service. You will receive an automatic email that the request to become the BSA for Manage Mailing Activity and business location(s) has been approved.

4.2.3   Select an Incentive Program   [3]

1. From the BCG home page, select Incentive Programs under the Account Service category.

Account Service

- Balance & Fees (PostalOne!)
- Manage Permits (PostalOne!)
- Incentive Programs
- Verification Assessment Evaluator (PostalOne!)

2. Identify whether you are a Mail Owner or Mail Service Provider

Identify yourself by selecting the appropriate option.

Correctly identifying yourself is important for several reasons. For instance, some system features are only available to Mail Service Providers (MSPs). The MSP Activity Report and the ability to auto-enroll mail owners CRIDs are examples of features that are only available to registered MSPs. Refer to Figure 3 (mock-up), functionality will be available in the *PostalOne!* Release 31 in June 2012.
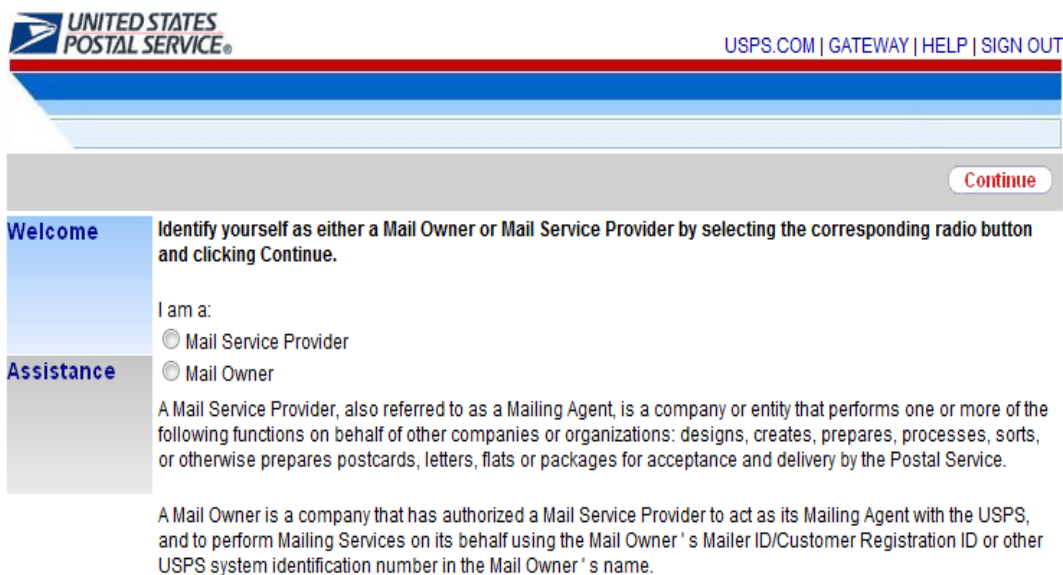
Figure 3: Mail Owner or Mail Service Provider identification (*PostalOne!* Release 31)

3. Select an Incentive Program

   Select the *2012 Mobile Commerce and Personalization Promotion* by clicking on the program
   name. Refer to Figure 4.
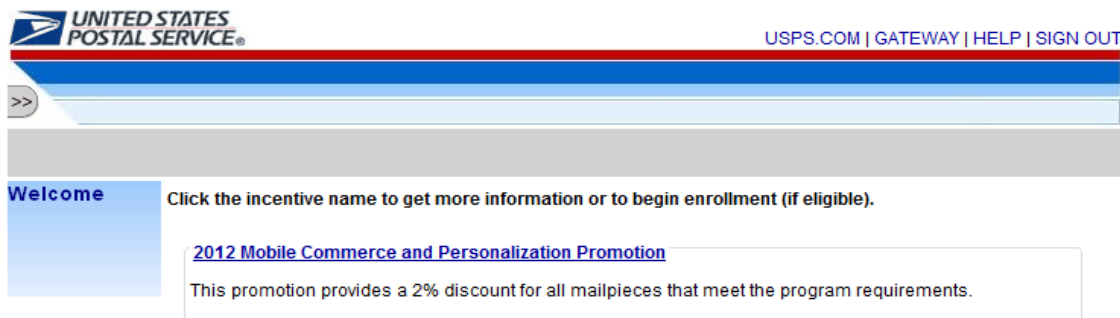
Figure 4: Incentive Program Selection

4. Select the Begin Enrollment button

To begin enrollment into the selected Incentive Program, select the **Begin Enrollment** button located at
the top right corner of the page.

4.2.4   Enroll 4

1.   Follow the Enrollment Tasks.

Complete the Enrollment tasks by using the tabs located on the left-hand side of the page, or by clicking the
links associated with each step. As you complete each task, the system will display the task as "Complete".
Some Enrollment tasks become available only after visible tasks have been completed. Refer to Figure 5.

Figure 5: Enrollment Status

Additional Contact Information Tab

The Additional Contact Information tab allows you to save contact information for an alternative primary contact and for a technical contact. You must enter information for the alternative primary contact to complete this task.

Locations Tab

The Locations tab allows you to review your participating mailing locations. You must verify the accuracy of the displayed locations and select the <I Agree> button to complete this task.

Permit Accounts Tab

The Permits Accounts tab allows you to verify the payment accounts associated with the participating business locations. You must visit this tab at least once to complete this task.

Based on the permit types allowed by the incentive program, your permits will be sorted out into either eligible or ineligible permits as shown in the picture below.

Program Summary

Your permits and payment accounts associated with the locations from the Locations tab are shown below. Verify that your payment accounts are listed correctly. If you are missing a payment account, it may be because one of locations is also missing on the "Locations" tab. If this is not the case, please let us know by sending a message in Program Assistance.

Additional Contact Information
Incomplete

Filter --Select Table-- ▼ by --Select Category-- ▼ for [   ] (Filter)
(Clear Filter)

Eligible Permits:

Showing 1 - 5 of 5

Locations
Incomplete

Permit	CRID	Type	ZIP/Postal Code	CAPS
XXXXX	XXXXXX	MT	20005-2602	
XXXXX	XXXXXX	PC	20005-2602	
XXXXX	XXXXXX	MT	20005-2602	
XXXXX	XXXXXX	PI	20005-2602	
XXXXX	XXXXXX	PI	20005-2602	

Permit Accounts
Complete

Export options: CSV | Excel | XML | PDF

Ineligible Permits:

Showing 1 - 8 of 8

Program Assistance

Next>

Permit	CRID	Type	ZIP/Postal Code	CAPS
XXXXX	XXXXXX	PD	20005-2602	
XXXXX	XXXXXX	PP	20005-2602	
XXXXX	XXXXXX	PP	20005-2602	
XXXXX	XXXXXX	PE	20005-2602	
XXXXX	XXXXXX	PE	20005-2602	
XXXXX	XXXXXX	OI	20005-2602	
XXXXX	XXXXXX	BR	20005-2602	
XXXXX	XXXXXX	PE	20005-2602	

Export options: CSV | Excel | XML | PDF

Figure 6: Permit Accounts in the Incentive Programs service

It is important to note that the incentive will only be given when the Permit (paying for the mailing) is an eligible permit and the Mailing Date (postage statement finalization date is within the incentive program effective period). For example, for the 2012 Mobile Commerce and Personalization promotion, only Permit Imprint (PI), Precancelled Stamps (PC), Meter (MT) and Ghost (GH) permit types are eligible. Make sure that the permit associated to the eDoc claiming the promotion is populated with a permit that is one of the eligible permits types.

Figure 7: Certification Tab

The Certification tab becomes available once the preceding steps have been completed. Refer to Figure 7. You must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, you are enrolled into the Incentive Program.

You will know that you are fully enrolled when you see the Enrollment Status change to "Enrolled". To unenroll, simply click on the <Unenroll> button. Refer to Figure 8.

Figure 8: Enrolled Status

5. Incentive Program Activity Reporting

Once completely enrolled, a new tab is displayed below the Certification tab. Whether you are a Mail Service Provider or a Mail Owner, you should now see the Activity Report Tab. The content in the Activity Reporting is different for the MSP and Mail Owner to provide MSPs and Mail Owners with information that is relevant to each.

5.1   Activity Report – Mail Service Providers

The top section of the Activity Report for MSPs, Activity Summary, displays a summary view of the aggregate Volume (Total Pieces), Discount Amount and Total Postage associated to the program in real-time.

As an MSP, you can see how much you have saved for all your clients across the board up until that point in time. Note that if you are also mailing for yourself, the information associated to those mailing will also be included in the aggregate view. Refer to Figure 8.

Activity Summary

Activity Report	Award Start Date	Award End Date	Total Pieces	Discount Amount	Total Postage
	07/01/12	08/31/12	744,559	$2,432.00	$408,668.32
		Total:	744,559	$2,432.00	$408,668.32
	Showing 1 to 1 of 1 entries				

Figure 8: Activity Summary Report

The bottom section, Detailed Activity, displays a more detailed view based on each postage statement generated. For each postage statement, the report displays the mailing date, the CRID populated in the 'for' field, the company name associated to the CRID and the permit information. Additionally, it displays the Volume (Total Pieces), Discount Amount and Total Postage per postage statement. Refer to Figure 9.

Detailed Activity

Mailing Start Date: _____   Mailing End Date: _____

Filter: _____

Activity Report	Mailing Date	CRID	Company	Permit Number	Permit Type	Total Pieces	Discount Amount	Total Postage
	07/01/12	20403XXX	Client A	67	PI	986,756	$1,234.00	$8,786.00
	07/01/12	20403XXX	Client A	67	PI	743,345	$343.00	$7,667.00
	07/03/12	20403XXX	Client B	67	PI	1,233	$545.00	$5,645.00
	07/04/12	20403XXX	Client C	67	PI	645,435	$6,564.00	$3,245.00
	07/05/12	20403XXX	Client B	67	PI	3,432	$9,768.00	$2,332.00
	07/05/12	20403XXX	Client A	67	PI	34,343	$898.00	$1,122.00
	07/07/12	20403XXX	Client D	67	PI	7,856	$6,787.00	$134.00
	07/08/12	20403XXX	Client F	67	PI	43,434	$4,534.00	$6,565.00
	07/09/12	20403XXX	Client B	67	PI	986	$787.00	$9,787.00
	Showing 1 to 9 of 9 entries							

Figure 9: Detailed Activity Report

6. Frequently Asked Questions (FAQ)

1. What is a contingent BSA and when is it required?

Because Incentive Programs involve financial data, an extra approval layer has been added to protect your data. If there is no BSA for Incentive Programs, the BSA for Manage Mailing Activity must approve whoever requests to become the BSA for Incentive Programs. This approval must be provided for each of your company's locations. Once you become the BSA for Incentive Programs for a location you can approve or deny access to the service for that location.

Enrolling all of your business locations for the Incentive Programs Service ensures that all of your mail gets accounted for, and that you can receive the complete benefits for all your mailings associated to those locations.

When requesting access to Incentive Programs, the request will be pending until a BSA for Manage Mailing Activity approves your request for access. If there is no BSA for Manage Mailing Activity, when you are requesting access to Incentive Programs you can become the BSA for Manage Mailing Activity. Your request for Incentive Programs will be approved automatically. Otherwise if you opt not to assume the BSA role, you will have to wait until the Incentive Programs BSA approves your request.

2. For which locations should I become the BSA?

It is generally recommended that you become the BSA if no BSA exists for a service and location combination. You should not become the BSA if there is a different individual at your company that should manage other user's access to the service.

If a service requires BSA approval, then there must be a BSA for your company's mailing locations before members of your company can access the service for those locations.

3. How can I add a new location to Incentive Programs after I'm done with the enrollment process?

Complete section 1 of the enrollment guide: "Request Incentive Programs", making sure that you select the <Add Location> button in step 4.

If you are experiencing difficulties while adding a location, refer to section 2 (a) of the Troubleshooting document.

4. Where can I see the CRID of a location for which I requested a service?

Select the 'Request Status >>' link located at the top of the page. This displays a page that contains a table with a list of all the locations for which requests have been made. Find the location by identifying the exact address and then select the link under the 'Business Location' column for the corresponding row. This opens up a pop-up window that displays the CRID of the location.

5. Where can I view my access to business services?

Sign in to the Business Customer Gateway and select the 'Profile >>' link located at the top of the page. This displays a page with all the locations and their associated services.

6. Where can I see the status of my requests to access Incentive Programs?

To look up the status of the request for all your locations, select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests. Make sure that you are looking at locations for which the Service is "Incentive Programs".

7. What is the difference between requesting access to incentive programs and requesting access to a specific incentive?

Requesting access to incentive programs from the BCG determines who can access an incentive program on behalf of your company. Once access has been granted to incentive programs, you can select the incentive programs that your company would like to participate in.

8. Why is it recommended to use the CRID of a location when trying to add the location to my profile?

Using the CRID ensures that you uniquely identify the business name and address combination for your company. Even with an identical address, if you use variations of a company name, such as "MyCompany" and "MyCompany Global Services", they may not be recognized as belonging to the same company by the address matching system. Using the CRID circumvents this potential issue.

10. What is the difference between Mail Owner and MSP enrollment?

If you are a mail owner but using an MSP to prepare your mailings using your permit then you will need to register through the Business Customer Gateway and select the Mail Owner identity. Selecting the Mail Service Provider (MSP) identity, enables an MSP to enroll their customers in the incentive program in a scenario that enables the MSP to pay for the mailing.

11. If I'm a mailer owner but using the MSP to prepare my mailings, whereby the MSP permit to pay for the mailing will be used, then who has to register?

In this scenario, the MSP is only required to enroll. The MSP is still required to identify the mail owner in the By/For of the eDoc. The MSP enrollment process captures the MSP CRIDs. These CRIDs are used in the "By" field of the eDoc which the MSP prepares.

12. Why doesn't the CRID display in my Profile?

We have identified this as a bug. In the June 2012 *PostalOne!* Release this will be fixed. Here is the work-around: after your initial sign-up, log in and then log out of the Business Customer Gateway. Select the Incentive Program link, then the Locations tab your CRID should then display.

13. My Permits do not appear to be linked. How can I link them in the BCG?

While in the Incentive Program enrollment module, if you do not see your permit listed in the Payment Accounts tab, you can link your permit yourself. From your homepage click the Manage Permits link (under Account Services), then select which affiliate office you want to link the permit. If you have only one, select it. (then follow the prompts). To link your permit on your own, you will need to know the following information: 1) Account Number, Account Type, and Post Office ZIP Code where you opened your permit and on of ten of your most recent transactions. If you are unable to link your permit on your own, you can call the *PostalOne!* Help Desk at (800) 522-9085.

7. Troubleshooting

1. <u>Step 1.1</u>   **Navigate to the BCG and sign in.**

    a. *What is the Business Customer Gateway web address?*
        https://gateway.usps.com

    b. *I can't sign in*

    If you're unable to sign in, it is because you either don't have an account or you're entering the incorrect username/password combination.

    If you have an account, click on the 'I forgot my password' link and follow the instructions to reset your password.

2. <u>Step 1.4</u>   **Add all your Business Locations**

    a. *I don't know the CRID of the location that I want to add*

    There are two reasons why you might not know the CRID of a location you're trying to add.
        i.   New Location
             Your location will be a new location in our system. Since CRIDs are assigned by USPS, locations which are not currently in our system don't have one.

        ii. Existing Location
             All existing locations have been assigned a CRID. In this case, you may simply not know the CRID.

    For a New Location, select the 'Business Name and Address' radio button and enter the exact address of the location you wish to add.

    For an Existing Location, if you remember the exact name of the company and the exact address of the location as it was initially enrolled, you can select the 'Business Name and Address' radio button and enter the required information. It is recommended that you use the CRID of a location when it has one. If you don't know how to find the CRIDs of locations refer to 7 (b) below.

    For more information on why you should add all of your business locations, see (3) of the FAQ sheet.
    For more information on why you should use the CRID of a location to add it, see (9) of the FAQ sheet.

3. <u>Step 1.6</u>   **Confirm your Selection**

    a. *I don't know the CRID of the location I just added*

    b. To look up the CRID of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This displays a page with all of your

requests. Find and select the location's name to display a pop-up window that contains its CRID.

4. **Step 1.7**   **Request to be the BSA for Incentive Programs**

     a. Of which locations should I become the Business Service Administrator (BSA)?

You should only become the BSA of a location if you are authorized by your company to perform this role. It is recommended that you become the BSA of all the locations for which you're authorized. When requesting access to Incentive Programs, the request will be pending until a BSA for Manage Mailing Activity approves your request for access. If there is no BSA for Manage Mailing Activity, when you are requesting access to Incentive Programs you can become the BSA for Manage Mailing Activity. Your request for Incentive Programs will be approved automatically. Otherwise if you opt not to assume the BSA role, you will have to wait until the Incentive Programs BSA approves your request.

5. **Step 1.7.2**   **First become the BSA for Manage Mailing Activity**

     a. Why is this required?

This step, which is called "Contingent BSA Approval", helps prevent unauthorized users from accessing a service on behalf of your company. For more information about Contingent BSA and Contingent BSA Approval, see number (2) on the FAQ sheet.

6. **Step 2.3**   **Repeat 1.4, 1.5 and 1.6 above**

     a. I don't remember which were the locations entered in 1.4 for which I requested to become the BSA for Incentive Programs

To look up the status of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests.

Find the locations with a status of "Pending External BSA" and select their name to display a pop-up window that contains its CRID. Now you can use their CRIDs to add them.

     b. I don't know the CRIDs of some locations

To look up the CRID of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests. Find and select the location's name to display a pop-up window that contains its CRID.

     c. I don't know if I'm entering the exact addresses that were entered in 1.4

Instead of entering addresses to add locations that were already entered in 1.4, it is recommended that you use the CRIDs of the locations. If you don't know how to find the CRIDs of locations refer to (b) directly above.

7. **Step 3.1**   **Select Incentive Programs under the Account Service category.**

     a. There is no Incentive Programs link displayed on the page. What's happening?

Incentive programs do not go live until May and the link on the Business Customer Gateway will not be available until that time. You have gained a head start on the registration process by completing the first two steps of this guide.

8. **Step 4   Enroll**

Program Registration Landing Page

   a. ***When I select an Incentive Program, the message "This program is not available for enrollment" is displayed. Why can't I enroll?***

Not all Incentive Programs are available to enroll in at all times or for all users/businesses. This message indicates 1 of 2 things:

   i.   The current date falls outside of the Incentive Program's specified registration time period. or
   ii.   You are not eligible to enroll for the Incentive Program due to not having an eligible or pre-qualified permit.

If you believe neither of these is your case, contact the Help Desk by using the Program Assistance tab.

Locations Page
   b. ***I thought I had enrolled a location for Incentive Programs in the BCG, but I don't see it in the 'Locations' tab.***

The first step towards resolving this issue is to verify that you actually enrolled the location(s) to Incentive Programs. To do this, navigate to the Business Customer Gateway and sign in. To look up the status of any location, select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests. Make sure that your locations have a Status of "Approved" and that the Service is "Incentive Programs".

If your Location's Service is different from "Incentive Programs" you need to complete section 1 of the Enrollment Guide.

If your Location's Status is "Pending BSA", this means that the BSA for Incentive Programs for your location needs to approve your request to have the location added to Incentive Programs.

If your Location's Status is "Pending External BSA" you need to complete section 1.7.2 of the Enrollment Guide. Before you complete the section it is recommended that you read (4a) above.