Business Customer Gateway (BCG)

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
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
## Common Terms and Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
<th>Uses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electronic Documentation (eDoc)</td>
<td>• Electronic mailing Information that replaces the use of hardcopy postage statements and supporting documentation (e.g. the qualification report) with electronic submission</td>
<td>• eDoc is a requirement for Full-Service</td>
</tr>
<tr>
<td>Customer Registration ID (CRID)</td>
<td>• A unique ID number issued by USPS to identify a customer’s physical business location (address)</td>
<td>• Used to identify Mail Owners and Mail Preparers within eDoc</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Used to determine to whom mailing information and reports should be distributed</td>
</tr>
<tr>
<td>Mailer ID (MID)</td>
<td>• A six- or nine-digit number issued by USPS to a mail owner or mail service provider.</td>
<td>• Used in IMb barcodes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Also used to identify Mail Owners and Mail Preparers within eDoc</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Used to determine to whom mailing information and reports should be distributed</td>
</tr>
<tr>
<td>Business Services</td>
<td>• Services that cover basic business functionality within the BCG</td>
<td>• Used to obtain access to certain functionality within the BCG</td>
</tr>
<tr>
<td></td>
<td>• Depending on your company’s needs, different employees may need access to different services</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Access to services is regulated by the Business Service Administrator (BSA) of each service</td>
<td></td>
</tr>
<tr>
<td>Business Service Administrator (BSA)</td>
<td>• 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</td>
<td>• Role used to grant or deny other users access to a business service/functionality within the BCG</td>
</tr>
</tbody>
</table>

Introduction
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.
New User: 1) Register

https://gateway.usps.com

A new user clicks on “Register for free”
New User: 2) Complete Registration Form

To establish a new account, create a user name, password and two security questions.

Enter name, business information, phone number and email address.

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.
When a new business account is created, a CRID is automatically assigned during registration. New business locations will automatically be assigned a 9-digit Mailer ID.
New business users will be eligible to use popular business applications or “services” pertinent to Full-Service as well to as access other services.

The Mailer ID service allows mailers to request and manage MIDs.

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

- Manage permit information
- 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

Clicking Continue completes the process and takes the new user to the 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
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
Linking Your Permits

- Click your business location link
  - Any linked permits will display in “Permit Profile” tab
  - Click the “Permit Validation” tab

NOTE: only the Business Service Administrator can access this tab
Linking Your Permits

- 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.

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<tr>
<th>Type of Mailer</th>
<th>Required to use TEM?</th>
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<tr>
<td>Mail Owners and Mail Service Providers using vendor approved software that has been validated for eDoc and Full-Service with the Postal Service</td>
<td>No</td>
</tr>
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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:

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<tr>
<td>Mail.dat or Mail.XML</td>
<td>Required for mailings of 10,000 pieces or more</td>
<td>Yes</td>
</tr>
<tr>
<td>Postal Wizard</td>
<td>For mailings of less than 10,000 identical-weight pieces</td>
<td>No</td>
</tr>
<tr>
<td>Intelligent Mail for Small Business (IMsb) Tool</td>
<td>For mailers who mail less than 10,000 pieces per mailing and less than 250,000 pieces annually</td>
<td>No</td>
</tr>
</tbody>
</table>
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.
Once the Mail.dat client has been installed, you can upload a Mail.dat file to TEM.

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.
TEM Submission – Upload the Mail.dat job

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.
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.
In order to submit a Mail.XML file in the TEM environment, you must first download the Mail.XML WSDL 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 Submission – Upload Mailing Job in TEM

TEM Mail.dat files are uploaded via the TEM Mail.dat client. Mail.XML messages are sent from the mailer software to the Postal Service.

<table>
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<tr>
<td><strong>Mail.dat</strong></td>
</tr>
<tr>
<td>• Create your Mail.dat Full-Service mailing job using your software.</td>
</tr>
<tr>
<td>• Open the Mail.dat client and upload your job for submission.</td>
</tr>
<tr>
<td>• 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.</td>
</tr>
</tbody>
</table>

| **Mail.XML**                          |
| • Create your Mail.XML Full-Service messages using your software. |
| • Send messages from your software 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

- 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
Review the Mailing Job in TEM

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.

Under the Test Environment for Mailers (TEM), 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.”

*** NOTIFICATION ***

You are now leaving the Business Customer Gateway and going to the Test Environment for Mailers (TEM) to allow submission of jobs for validation processing in a non-production environment.

Please click ‘Home’ in TEM to get back to Business Customer Gateway.
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
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.
Review the Mailing Job in TEM – Postage Statement

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

Open the job’s postage statement by selecting the job’s Postage Statement ID.

Note the legend at the top denoting the abbreviations used in the Postage Statement ID column. (F) denotes Full-Service statements.

The job’s postage statement will appear.
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.
Review the Mailing Job in TEM - Reconciliation Report

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

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<td>Yes</td>
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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 production 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”
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.
Production Submission – Upload the Mail.dat job

To upload the file in Production, follow the same steps that were outlined in 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”.

Production
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 Submission – Mail.XML

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

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.
Reports – Balance & Fees

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

- 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
Full-Service Reports Overview

- **Start-the-Clock** - The time that USPS has taken possession of the mail and the starting point at which the mail will be measured against the appropriate service standards. Mailers can use Start-the-Clock to anticipate when their mail will be delivered.

- **Container, Tray and Bundle Scan Reports** – Provides mailers with scan events received when a container, tray or bundle is being handled by USPS. Mailers can use visibility data to anticipate when their mail will be delivered or if issues were 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.
Full-Service Feedback

Clicking Data Distribution/Informed Visibility Dashboard displays a dashboard with links to feedback information.
Full-Service Start-the-Clock Report

The BCG system displays the Full-Service Start-the-Clock Summary as an online report.
Container, Tray and Bundle Scan Data Reports

Full-Service Feedback
### ACS – Change of Address

<table>
<thead>
<tr>
<th>OriginalIMB</th>
<th>OldPrimaryNumber</th>
<th>OldStreetName</th>
<th>OldCity</th>
<th>OldState</th>
<th>OldZipCode</th>
<th>MoveEffectiveDate</th>
<th>NewPrimaryNumber</th>
<th>NewStreetName</th>
<th>NewCity</th>
<th>NewState</th>
<th>NewZipCode</th>
</tr>
</thead>
<tbody>
<tr>
<td>0024389999918694735421201409403</td>
<td>218</td>
<td>CHARLES</td>
<td>BALTIMORE</td>
<td>MD</td>
<td>21201</td>
<td>01/18/2013 00:00:00</td>
<td>251</td>
<td>101ST</td>
<td>NEW YORK</td>
<td>NY</td>
<td>10025</td>
</tr>
</tbody>
</table>

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

### ParsedAddressOnPiece

<table>
<thead>
<tr>
<th>OriginalIMB</th>
<th>RecordCreationDate</th>
<th>ActionCode</th>
<th>OnPieceCityStateZip</th>
<th>ReasonCode</th>
<th>ClassNotificationType</th>
<th>FeeNotification</th>
</tr>
</thead>
<tbody>
<tr>
<td>40092899999900000708864068848701</td>
<td>02/14/2013 00:00:00 W</td>
<td>1901</td>
<td>CLAY WOODS PKWY</td>
<td>LIBERTY MO 64068</td>
<td>Q</td>
<td>C</td>
</tr>
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### Full-Service Feedback

53
Resources for Mailers

• **RIBBS Website:** [https://ribbs.usps.gov](https://ribbs.usps.gov)
  – Getting Started Page: [https://ribbs.usps.gov/gettingstarted/](https://ribbs.usps.gov/gettingstarted/)
  – Business Customer Gateway Information: [https://ribbs.usps.gov/gateway/](https://ribbs.usps.gov/gateway/)

• **Mailpiece Design Analyst**
  – Phone: 855-593-6093
  – Email: mda@usps.gov

• **PostalOne! Help Desk**
  – Phone: 800-522-9085
  – Email: postalone@usps.gov
Questions