MSP Balance Check



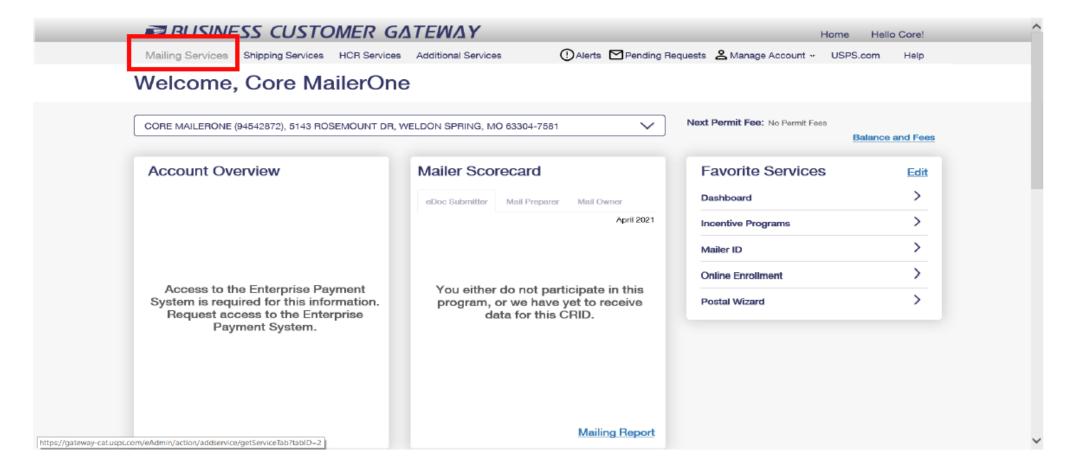
MSP Balance Check Capability

- Allows MSPs to perform a balance check for EPS and Local Trust accounts at the permit level
 - This is only for those permits which are specifically authorized by the permit holder.
 - The MSP will not be granted access to the permit holder's account, but will only be able to verify if sufficient funds are available prior to a mailing.
- Permit Holder will need to grant permission for the MSP to see EPS and Local Trust information
 - If a permit changes the CRID association then it is will require the Permit Holder to grant permission again
- Search Capability will be through the Customer Validation Tool
- Functionality is restricted to MSP CRIDs only
- Balance information is on the Permit Information Search and the Bulk Search by Permit

Permit Holder Grants Permission

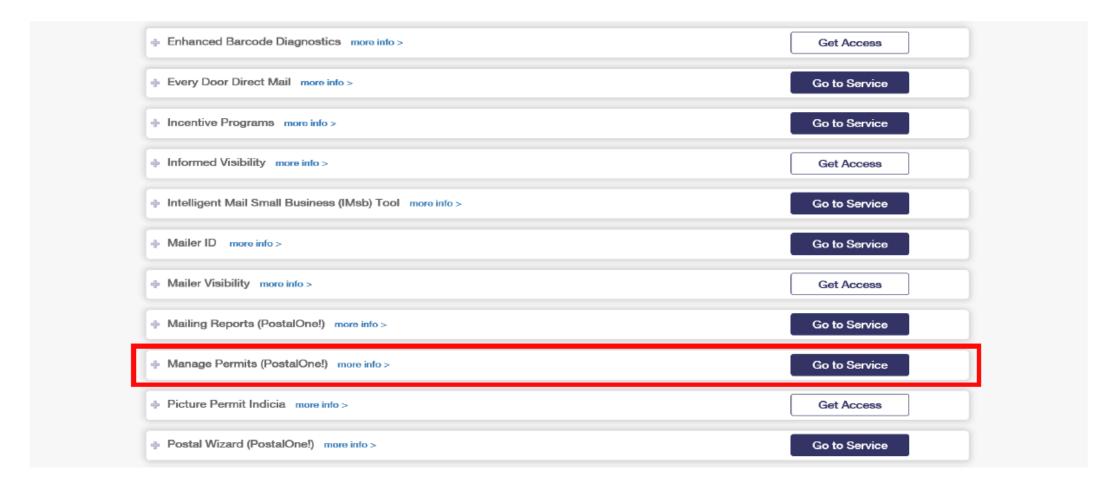


Permit Holder will need to grant permission to MSP to be able see the EPS and Local Trust information (Account Number, Status, Account Balance). Permit Holder will need to login into the BCG and navigate to Mailing Services.



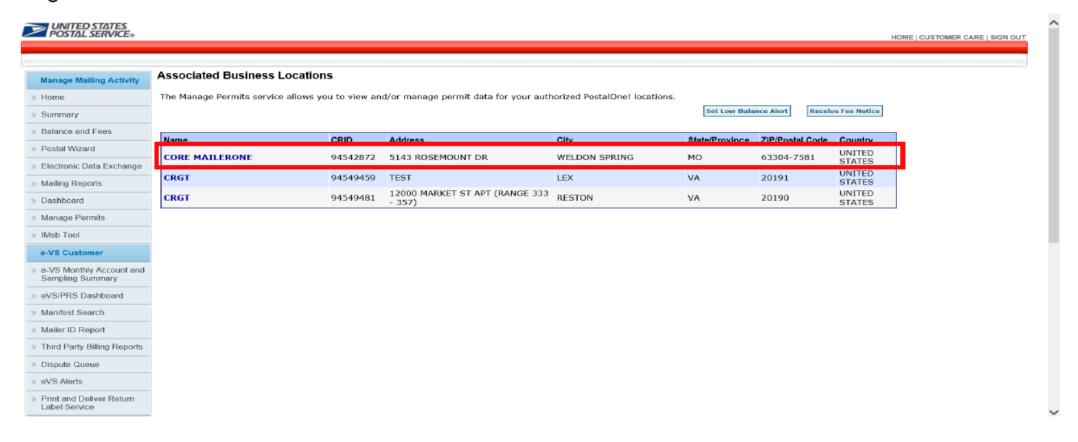


Within the Mailing Service area navigate to Manage Permits service.



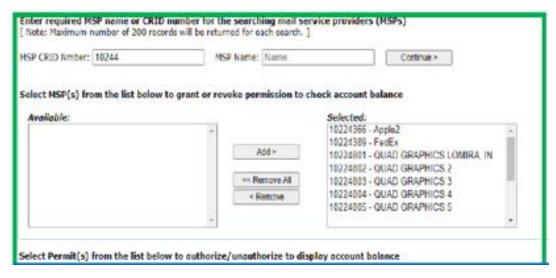


Once in the Manage Permits page then select the Associated Business Location for the permits wanting to be modified.



Navigate down to the MSP Balance Check Authorization section then select MSP and Permit for MSP Balance Check Authorization.

Summary		
	Name:	TOYS
Balance and Fees	CRID:	20102042
Postal Wizard	Address:	6501 HARFORD RD
Electronic Data Exchange	City:	BALTIMORE
Mailing Reports	State/Province:	MD
	ZIP/Postal Code:	21214-1302
Dashboard	Country:	UNITED STATES
Manage Permits	Mail Facility ID:	98144-0000
IMsb Tool	Discounts and Rebates:	
e-VS Customer	eVS Participant:	
e-VS Monthly Account and Sampling Summary	PR\$ Participant:	
	Web Service Enabled:	
Manifest Search	Mail Service Provider:	
eVS/PRS Dashboard	By/For Verification Threshold (%):	
	Seamless Account Option:	Seamless Acceptance Seamless Account Profile
Mailer ID Report	Seamless Incentive Permit:	None Select Seamless Incentive Permit
Third Party Billing Reports	MSP Balance Check Authorization:	Select MSP and Permit for MSP Balance Check Authorization
Dispute Queue		



Select Permit(s) from the list below to authorize/unauthorize to display account balance

Please select Action:

Authorize Permits

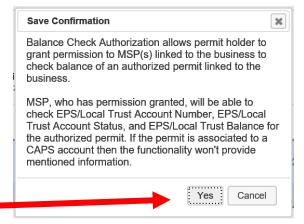
Un-Authorize Permits

To Authorize Permits - Select Authorize Action and check permits to be Authorized. To Un-Authorize Permits - Select UnAuthorize Action and uncheck permits to be Un-Authorized.



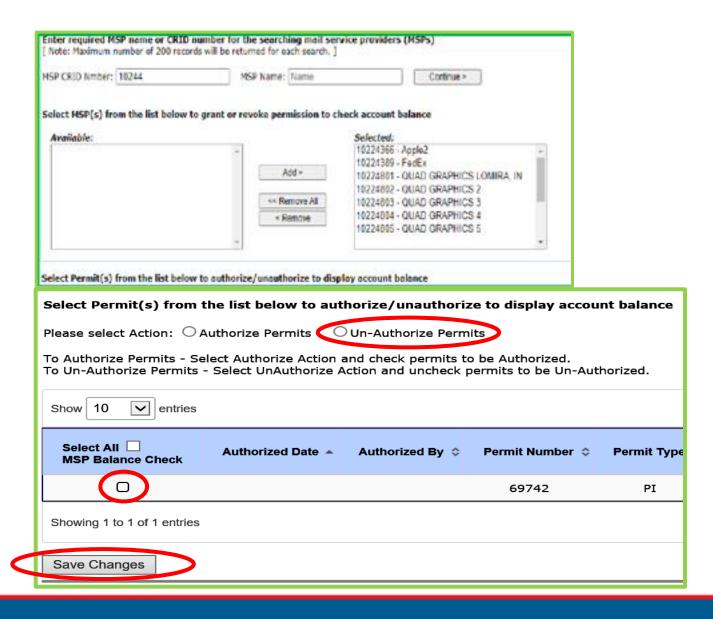
Once in the MSP Balance Check Authorization screen, the Permit Holder will either enter an MSP CRID to search or choose from the **Selected Box**. (Green)

Once the Permit Holder has selected the MSP CRID, next select the permits the MSP will be able to see the balance information. The Permit Hold can Select All or specify a permit(s). (Blue)





Permit Holder Revoke Permission



To Revoke Permission, go to Select Action and click on radio button for **Un-Authorize Permits**.

Uncheck the authorized permit and click on **Save Changes**.

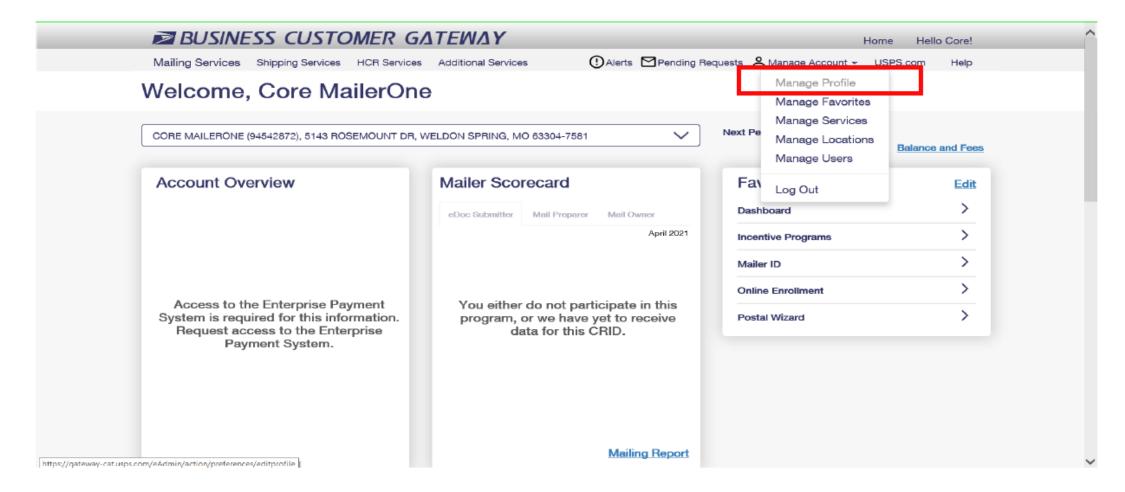


Customer Validation Tool



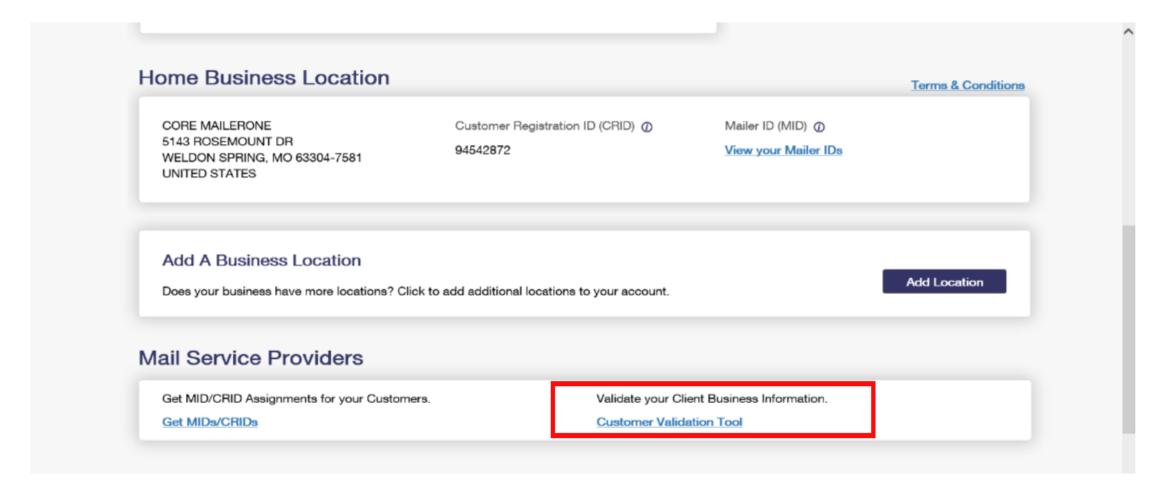
Customer Validation Tool Search

For the MSP to perform the MSP Balance Check the MSP will need to login into the BCG and navigate to Manage Account. Selecting the Manage Profile option.

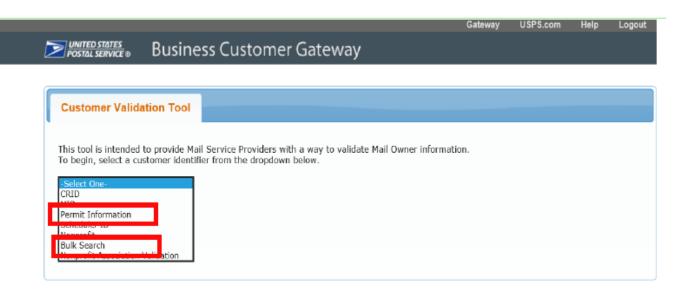


Customer Validation Tool Search Cont.

In Manage Profile screen navigate to Mail Service Provider section and select the Customer Validation Tool



Customer Validation Tool Search Cont.



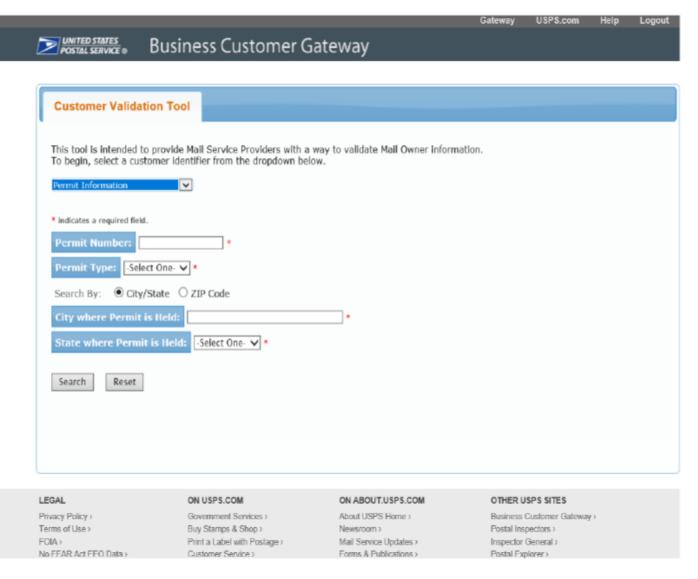
Within the Customer Validation Tool there are 2 ways to perform the balance check for EPS and Local Trust account information:

- Permit Information
- Bulk Search

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Customer Validation Tool – Permit Information Search



Performing the Permit Information Search

- Enter the Permit Number
- Select Permit Type
- Search by City/State or Zip Code
 - By City/State
 - Enter the City
 - Select the State
 - By Zip Code
 - Enter the Zip Code
- Click the Search Button

Customer Validation Tool – Permit Information Search

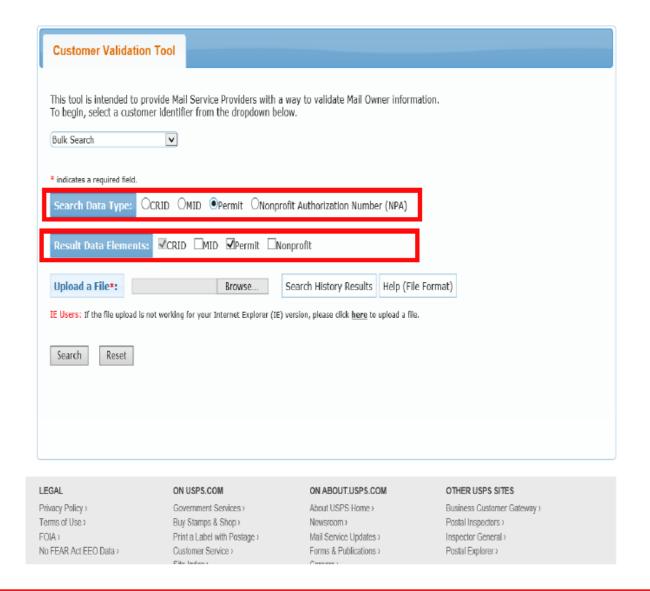


Permit Information Search Results come back it will include the Account Number, Account Status and Account Balance.

- Account Number
 - Displays the EPS Account number or Local Trust account number
 - EPS Account number will be 10 digits long
- Account Status
 - Display for EPS Accounts Active, Inactive, Suspend, Pending, Pending Closure
 - Local Trust will be blank
- Account Balance
 - If EPS account is a trust, then the balance will display.
 - If it is an ACH Debit account, then the word "Debit" will display
 - If EPS account is in Pending status, it will display N/A for Account Balance
- Disclaimer on the Search Results that the Account balance and Account Status is only a point in time and does not consider any postage statements currently in UPD status.
- If Permit Holder hasn't granted the MSP permission, then the Account Number, Accounts Balance or Account Status won't appear but a message to work with the Permit Holder.



Customer Validation Tool – Bulk Search

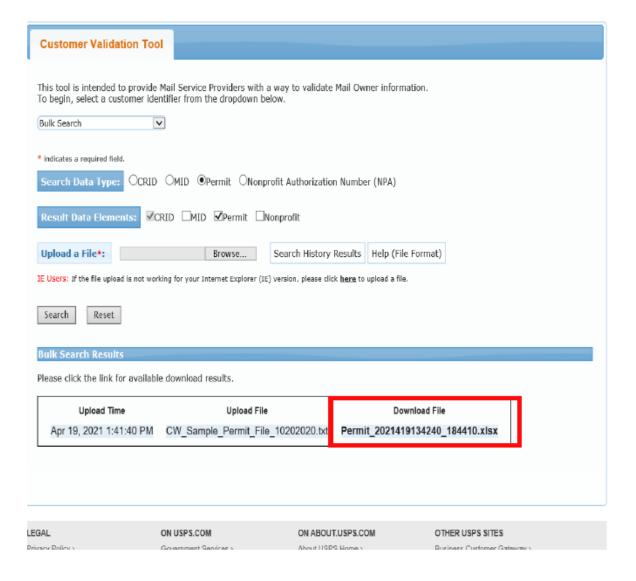


Performing the Bulk Search will allow you to search multiple permits at the same time.

- Search Data Type needs to be Permit. If anything, else is selected the Balance information won't be returned
- Results Data Elements ensure Permit is selected.
- Upload a File Browse for the Pipe Delimited file you want to use
- Search Click button to begin the search
- Search History Results Display your Search History, displays less than 25 files within the last 7 days
- Help (File Format) Discuss format and process to create a Pipe Delimited text/flat file using Notepad and MS Excel



Customer Validation Tool – Bulk Search



Once the Bulk Search Results are ready it will display the in the Bulk Search Results section. There will downloadable file with the results. The results will include:

- Account Number
 - Displays the EPS Account number or Local Trust account number
- Account Status
 - Display for EPS Accounts Active, Inactive, Suspend, Pending, Pending Closure
 - Local Trust will be blank
- Account Balance
 - If EPS account is a trust, then the balance will display.
 - If it is an ACH Debit account, then the word "Debit" will display
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