

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 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 Grant Permission Process

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.

The screenshot displays the USPS Business Customer Gateway (BCG) interface. At the top, the header includes the USPS logo and the text "BUSINESS CUSTOMER GATEWAY". Navigation links include "Home", "Hello Core!", "Mailing Services" (highlighted with a red box), "Shipping Services", "HCR Services", and "Additional Services". Utility links include "Alerts", "Pending Requests", "Manage Account", "USPS.com", and "Help".

The main content area features a welcome message: "Welcome, Core MailerOne". Below this is a dropdown menu showing the account address: "CORE MAILERONE (94542872), 5143 ROSEMOUNT DR, WELDON SPRING, MO 63304-7581".

The dashboard is divided into three main sections:

- Account Overview:** Contains the text: "Access to the Enterprise Payment System is required for this information. Request access to the Enterprise Payment System."
- Mailer Scorecard:** Shows a scorecard for "April 2021" with tabs for "eDoc Submitter", "Mail Preparer", and "Mail Owner". The text reads: "You either do not participate in this program, or we have yet to receive data for this CRID." A "Mailing Report" link is located at the bottom right of this section.
- Favorite Services:** Lists several services with right-pointing arrows: "Dashboard", "Incentive Programs", "Mailer ID", "Online Enrollment", and "Postal Wizard". An "Edit" link is located at the top right of this section.

Additional information includes "Next Permit Fee: No Permit Fees" and a "Balance and Fees" link. A URL is visible at the bottom left: "https://gateway-cat.usps.com/eAdmin/action/addservice/getServiceTab?tabID=2".

Permit Holder Grant Permission Process Cont.

Within the Mailing Service area navigate to Manage Permits service.

+	Enhanced Barcode Diagnostics more info >	Get Access
+	Every Door Direct Mail more info >	Go to Service
+	Incentive Programs more info >	Go to Service
+	Informed Visibility more info >	Get Access
+	Intelligent Mail Small Business (IMsb) Tool more info >	Go to Service
+	Mailer ID more info >	Go to Service
+	Mailer Visibility more info >	Get Access
+	Mailing Reports (PostalOne!) more info >	Go to Service
+	Manage Permits (PostalOne!) more info >	Go to Service
+	Picture Permit Indicia more info >	Get Access
+	Postal Wizard (PostalOne!) more info >	Go to Service

Permit Holder Grant Permission Process Cont.

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

UNITED STATES POSTAL SERVICE®

HOME | CUSTOMER CARE | SIGN OUT

Manage Mailing Activity

- > Home
- > Summary
- > Balance and Fees
- > Postal Wizard
- > Electronic Data Exchange
- > Mailing Reports
- > Dashboard
- > Manage Permits
- > IMsb Tool

e-VS Customer

- > e-VS Monthly Account and Sampling Summary
- > eVS/PRS Dashboard
- > Manifest Search
- > Mailer ID Report
- > Third Party Billing Reports
- > Dispute Queue
- > eVS Alerts
- > Print and Deliver Return Label Service

Associated Business Locations



The Manage Permits service allows you to view and/or manage permit data for your authorized PostalOne! locations.

[Set Low Balance Alert](#) [Receive Fee Notice](#)

Name	CRID	Address	City	State/Province	ZIP/Postal Code	Country
CORE MAILERONE	94542872	5143 ROSEMOUNT DR	WELDON SPRING	MO	63304-7581	UNITED STATES
CRGT	94549459	TEST	LEX	VA	20191	UNITED STATES
CRGT	94549481	12000 MARKET ST APT (RANGE 333 - 357)	RESTON	VA	20190	UNITED STATES

Permit Holder Grant Permission Process Cont.

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
Dashboard	ZIP/Postal Code:	21214-1302
Manage Permits	Country:	UNITED STATES
IMsb Tool	Mail Facility ID:	<input type="text" value="98144-0000"/>
e-VS Customer	Discounts and Rebates:	<input type="checkbox"/>
e-VS Monthly Account and Sampling Summary	eVS Participant:	<input type="checkbox"/>
Manifest Search	PRS Participant:	<input type="checkbox"/>
eVS/PRS Dashboard	Web Service Enabled:	<input type="checkbox"/>
Mailer ID Report	Mail Service Provider:	<input checked="" type="checkbox"/>
Third Party Billing Reports	By/For Verification Threshold (%):	<input type="text"/>
Dispute Queue	Seamless Account Option:	Seamless Acceptance Seamless Account Profile
	Seamless Incentive Permit:	None Select Seamless Incentive Permit 
	MSP Balance Check Authorization:	Select MSP and Permit for MSP Balance Check Authorization 

Permit Holder Grant Permission Process Cont.

Enter required MSP name or CRID number for the searching mail service providers (MSPs)
[Note: Maximum number of 200 records will be returned for each search.]

MSP CRID Number: MSP Name:

Select MSP(s) from the list below to grant or revoke permission to check account balance

Available:

Selected:
10224366 - Apple2
10224389 - FedEx
10224801 - QUAD GRAPHICS LOMIRA, IN
10224802 - QUAD GRAPHICS 2
10224803 - QUAD GRAPHICS 3
10224804 - QUAD GRAPHICS 4
10224805 - QUAD GRAPHICS 5

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

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.

MSP Balance Check Authorization	Authorized Date	Authorized By	Permit Number	Permit Type	Post Office Of Permit	Account Number	Account Status
<input checked="" type="checkbox"/>	01/24/2021	ponaTest	15	PI	Seattle WA 98124-0105	1000001395	ACTIVE
<input type="checkbox"/>			35	PC	Bristol VA 24201-9998	1000002097	PENDING
<input checked="" type="checkbox"/>	12/15/2020	ponaApple	61	PI	Centreville VA 20120-9998	1000008090	ACTIVE
<input type="checkbox"/>			69	MT	Centreville VA 20120-9998	1714382	
<input type="checkbox"/>			71	MT	Alexandria VA 22314-9998	1714300	

Show entries

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)

Save Confirmation

Balance Check Authorization allows permit holder to grant permission to MSP(s) linked to the business to check balance of an authorized permit linked to the business.

MSP, who has permission granted, will be able to check EPS/Local Trust Account Number, EPS/Local Trust Account Status, and EPS/Local Trust Balance for the authorized permit. If the permit is associated to a CAPS account then the functionality won't provide mentioned information.

Permit Holder Revoke Permission

Enter required MSP name or CRID number for the searching mail service providers (MSPs)
[Note: Maximum number of 200 records will be returned for each search.]

MSP CRID Number: MSP Name:

Select MSP(s) from the list below to grant or revoke permission to check account balance

Available:

Selected:

- 10224366 - Apple2
- 10224389 - FedEx
- 10224801 - QUAD GRAPHICS LOMIRA, IN
- 10224802 - QUAD GRAPHICS 2
- 10224803 - QUAD GRAPHICS 3
- 10224804 - QUAD GRAPHICS 4
- 10224805 - QUAD GRAPHICS 5

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

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.

Show entries

Select All <input type="checkbox"/>	MSP Balance Check	Authorized Date ▲	Authorized By ◆	Permit Number ◆	Permit Type
<input type="checkbox"/>				69742	PI

Showing 1 to 1 of 1 entries

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.

The screenshot displays the Business Customer Gateway (BCG) interface. At the top, the header includes the USPS logo and the text "BUSINESS CUSTOMER GATEWAY". Navigation links for "Mailing Services", "Shipping Services", "HCR Services", and "Additional Services" are visible. A user is logged in as "Core MailerOne" with a "Hello Core!" greeting. A dropdown menu for "Manage Account" is open, with "Manage Profile" highlighted in a red box. Other options in the menu include "Manage Favorites", "Manage Services", "Manage Locations", "Manage Users", and "Log Out". The main content area shows an account overview for "CORE MAILERONE (94542872)" and a "Mailer Scorecard" for April 2021. A "Mailing Report" link is visible at the bottom right. The URL in the browser address bar is <https://gateway-cat.usps.com/eAdmin/action/preferences/editprofile>.

Customer Validation Tool Search Cont.

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

The screenshot shows the 'Home Business Location' section of a web interface. It features a table with business details, an 'Add A Business Location' section with a button, and a 'Mail Service Providers' section with two options. The 'Customer Validation Tool' option is highlighted with a red box.

Home Business Location Terms & Conditions		
CORE MAILERONE 5143 ROSEMOUNT DR WELDON SPRING, MO 63304-7581 UNITED STATES	Customer Registration ID (CRID) ⓘ 94542872	Mailer ID (MID) ⓘ View your Mailer IDs


Add A Business Location
Does your business have more locations? Click to add additional locations to your account. [Add Location](#)

Mail Service Providers

Get MID/CRID Assignments for your Customers. Get MIDs/CRIDs	Validate your Client Business Information. Customer Validation Tool
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Customer Validation Tool Search Cont.

Gateway USPS.com Help Logout

 Business Customer Gateway

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

Select One
CRID
Permit Information
Bulk Search

LEGAL
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Terms of Use >
FOIA >
No FEAR Act EEO Data >

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Customer Service >
Site Index >

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Newsroom >
Mail Service Updates >
Forms & Publications >
Careers >

OTHER USPS SITES
Business Customer Gateway >
Postal Inspectors >
Inspector General >
Postal Explorer >

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

Customer Validation Tool – Permit Information Search



Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner Information. To begin, select a customer identifier from the dropdown below.

Permit Information

* Indicates a required field.

Permit Number: *

Permit Type: *

Search By: City/State ZIP Code

City where Permit is Held: *

State where Permit is Held: *

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

LEGAL Privacy Policy > Terms of Use > FOIA > No FFAR Act FFO Data >	ON USPS.COM Government Services > Buy Stamps & Shop > Print a Label with Postage > Customer Service >	ON ABOUT.USPS.COM About USPS Home > Newsroom > Mail Service Updates > Forms & Publications >	OTHER USPS SITES Business Customer Gateway > Postal Inspectors > Inspector General > Postal Explorer >
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Customer Validation Tool – Permit Information Search

Permit Information Search Results	
Account Number:	1000007133
Account Status:	ACTIVE
Account Balance:	\$5,891.16
Permit Number:	26
Permit Type:	PI
ZIP Code where Permit is Held:	20066-9998
Permit Status:	ACTIVE
CRID:	20101751 (Permit Linked)
Company Name:	PONESIT
Urbanization Code:	
Address Line 1:	100 E MARKET DR
Address Line 2:	
Address Line 3:	
City:	ARLINGTON
State/Province:	VA
ZIPCode/PostalCode:	22203-1553
Country:	UNITED STATES

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

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

Bulk Search

* indicates a required field.

Search Data Type: CRID MID Permit Nonprofit Authorization Number (NPA)

Result Data Elements: CRID MID Permit Nonprofit

Upload a File*:

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

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

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Customer Validation Tool – Bulk Search

Customer Validation Tool

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer Identifier from the dropdown below.

Bulk Search

* indicates a required field.

Search Data Type: CCRID MID Permit Nonprofit Authorization Number (NPA)

Result Data Elements: CRID MID Permit Nonprofit

Upload a File*:

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

Bulk Search Results

Please click the link for available download results.

Upload Time	Upload File	Download File
Apr 19, 2021 1:41:40 PM	CW_Sample_Permit_File_10202020.txt	Permit_2021419134240_184410.xlsx

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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
 - 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.