

Business Customer Gateway

February 2018

Agenda

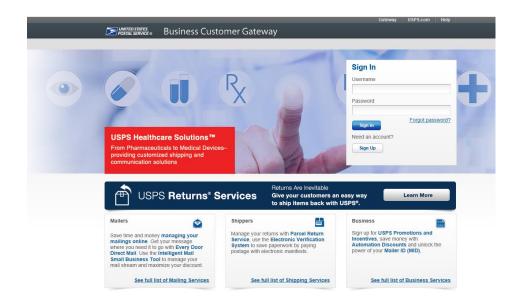
Introduction

- What is the BCG?
- What can the BCG do for customers?
- Common Terms and Definitions
- BCG
- Tour of the BCG
- BCG Welcome Page
- Registering a new user
- BCG Homepage
- Managing Multiple Locations and/or Multiple Users

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 Intelligent Mail® products and services, including PostalOne!, Facility Access and Shipment Tracking, Mailer IDs, eInduction and tracking.
- Access to multiple services is provided through a single user name and password.



What can the BCG do for customers?

Customers can utilize the Gateway to:

- Prepare, track and monitor mailings
- Manage Mailer IDs and permits
- Simplify Full-Service mailing and customer returns
- Target areas with direct mail
- Send and manage large shipments
- Order mailing and shipping labels
- Enroll for shipping services
- Generate mail and transaction history reports
- Stay informed of USPS promotions and incentive programs

Common Terms and Definitions

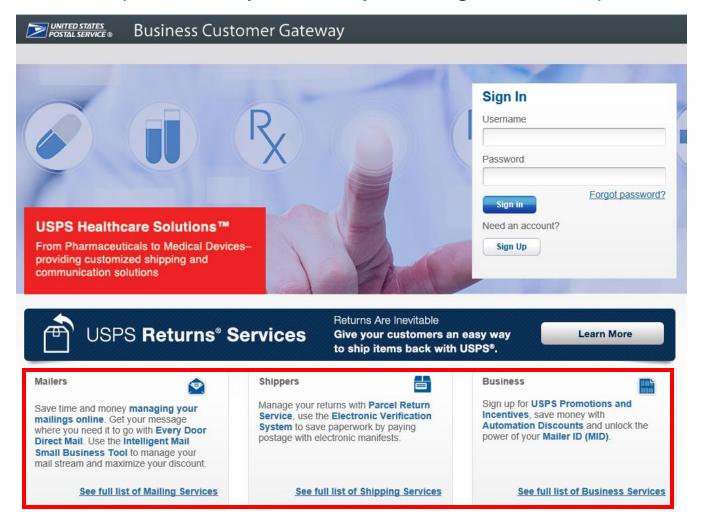
Term	Definition
Customer Registration ID (CRID)	 Unique ID numbers used by USPS to identify a customer's physical business location (address). CRIDs connect a company's location information across all USPS systems and applications.
Mailer ID (MID)	 Unique ID numbers assigned by USPS to identify a specific mail owner, mailing agent or other service provider. MIDs are either a 6- or 9-digit number based primarily on a mailer's historic mail volume.
Business Services	 Tools that can help you to make better use of all that the Postal Service has to offer. When registering, you will get access to services that cover basic business functionality. Having access to a service means that you can see and use it freely. Depending on your company's needs, different employees may need access to different services. Access to services is regulated by the Business Service Administrator (BSA) of <u>each</u> service.
Business Service Administrator (BSA)	 If you are the first user to request a service for your location, you will become the Business Service Administrator (BSA) of that service; you will be able to manage that service for any future users, controlling who can and cannot use it at your business location.

The BCG Overview

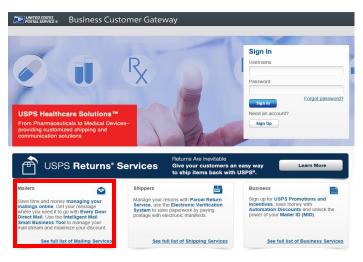
- Simplified, consolidated and streamlined registration process
 - Access automatically granted to the most popular services
 - Ability to custom select services at multiuser business locations
 - Improved navigation to easily see which services are accessible by the user and to request services
- Automatic creation of 9-digit MID when creating a new user account
- CRID is displayed when you register and on many consecutive screens within the BCG
 - CRID assigned automatically upon registration (same functionality as previous release)

BCG Welcome (Landing) Page

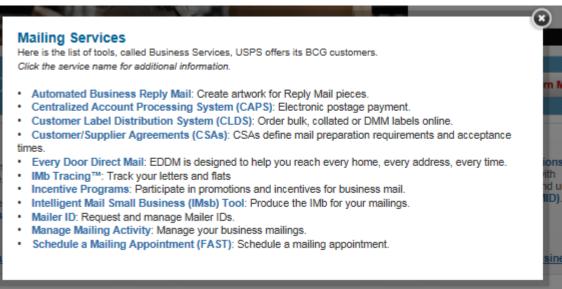
Mailers, Shippers and Business clients can obtain additional information about services provided by USPS by clicking on the respective links



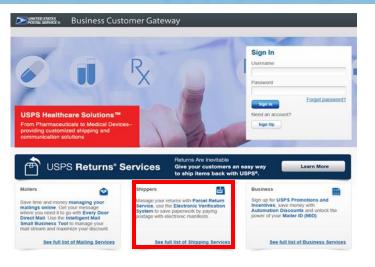
Information for Mailers

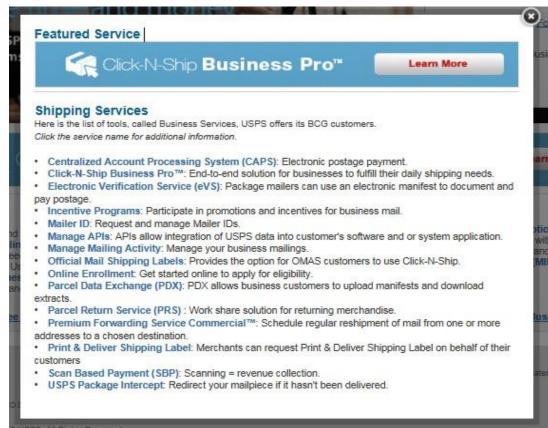


Users may click on any of the links highlighted in blue for additional information about each topic

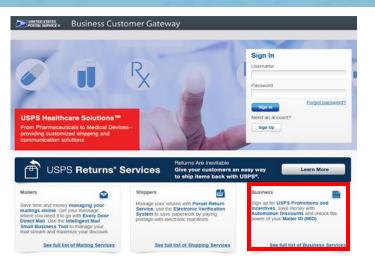


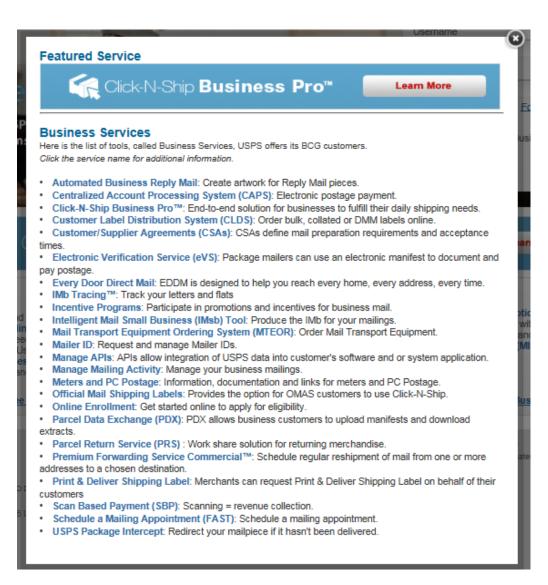
Information for Shippers





Information for all Business Services





Manage Mailing Activity (MMA)

Mailing Services

Here is the list of tools, called Business Services, USPS offers its BCG customers

Click the service name for additional information.

- ADVANCE: Track your Periodicals and standard ma
 Automated Business Reply Mail: Create artwork:
- Centralized Account Processing System (CAPS)
- Customer Label Distribution System (CLDS): Ord
- Customer/Supplier Agreements (CSAs): CSAs de
- · ePubwatch: Track your Periodicals mailing.
- . Every Door Direct Mail: EDDM is designed to help
- IMb Tracing™: Track your letters and flats
- Incentive Programs: Participate in promotions and
 Intelligent Mail Small Business (IMsb) Tool: Pro
- Mailer ID : Request and manage Mailer IDs.

 Manage Mailing Activity: Manage your business r

Shipping Services

Here is the list of tools, called Business Services, USPS offers its BCG customers Click the service name for additional information.

- . Centralized Account Processing System (CAPS): Electronic postage
- Click-N-Ship Business Pro™: End-to-end solution for businesses to fulf
 Electronic Verification Service (eVS): Package mailers can use an ele and pay postage.
- Incentive Programs: Participate in promotions and incentives for busine
 Mailer ID: Page and manage Mailer IDs.
- Manage Mailing Activity: Manage your business mailings.
- Online Enrollment: Get started online to apply for eligibility.
- . Parcel Return Service (PRS): Work share solution for returning merch
- Scan Based Payment (SBP): Scanning = revenue collection.

Business Services

Here is the list of tools, called Business Services, USPS offers its BCG customers

Click the service name for additional information.

- . ADVANCE: Track your Periodicals and standard mail
- . Automated Business Reply Mail: Create artwork for Reply Mail pieces.
- Business Service Network(BSN) eService: Create and monitor service requests.
- . Centralized Account Processing System (CAPS): Electronic postage payment.
- Click-N-Ship Business Pro™: End-to-end solution for businesses to fulfill their daily shipping needs.
- . Customer Label Distribution System (CLDS): Order bulk, collated or DMM labels online.
- Customer/Supplier Agreements (CSAs): CSAs define mail preparation requirements and acceptance times.
- Electronic Verification Service (eVS): Package maillers can use an electronic manifest to document
 and pay postage.
- ePubwatch: Track your Periodicals mailing.
- Every Door Direct Mail: EDDM is designed to help you reach every home, every address, every time
- IMb Tracing™: Track your letters and flats
- . Incentive Programs: Participate in promotions and incentives for business mail.
- . Intelligent Mail Small Business (IMsb) Tool: Produce the IMb for your mailings
- Mail Transport Equipment Ordering System (MTEOR): Order Mail Transport Equipment.
- Mailer ID: Peguest and manage Mailer IDs
- Manage Mailing Activity: Marage your business mailings.
- Meters and PC Postage, information, documentation and links for meters and PC Postage.
- Online Enrollment: Get started online to apply for eligibility.
- Parcel Return Service (PRS): Work share solution for returning merchandise.
- Scan Based Payment (SBP): Scanning = revenue collection.
- Schedule a Mailing Appointment (FAST): Schedule a mailing appointment.
- USPS Package Intercept: Redirect your mailpiece if it hasn't been delivered.

Manage Mailing Activity

(FAST): Schedu

The PostalOne! system provides a new automated, stream ned alternative to existing manual business mail a ceptance process. It features the following:

Integrated, web-based solutions, providing:

- Automated scheduling services for drop shipment mailings
- · Electronic documentation and postage statements
- · Simplified mail acceptance verification and payment pro esses
- Reduced hardcopy paper ork and handling costs
- · Increased operations efficiency with the mail induction process
- Improved access to mailing information and job tracking
- Enhanced account manager ant capability
- . Online Mail Quality and Full-Service reporting

Manage Mailing Activity - The Manage Mailing Activity service functionality includes:

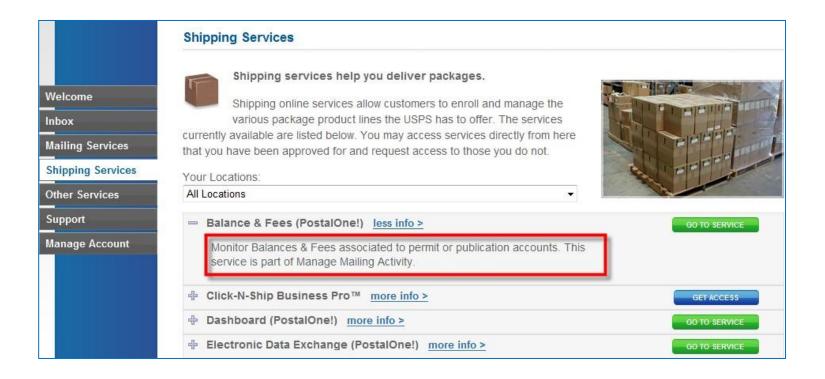
- Balance and Fees
- Dashboard
- Electronic Data Exchange
- Mailing Reports
- Manage Permits
- Postal Wizard
- Balance and Fees (Manage Permits)

Mailers have 24/7 access to all their mailing accounts to monitor balances and fees for ease of mailing. The Centralized Account Processing System (CAPS) accounts provide business mailers with expanded electronic payment options, including the ability to link accounts and access payment information.

- Please note that while Manage Mailing
 Activity is listed under all three categories
 of services, it is not a standalone service on
 its own
- MMA is a suite of services which includes six sub-services
- The MMA Knowledge Base Page shown on the left has been updated to list these subservices

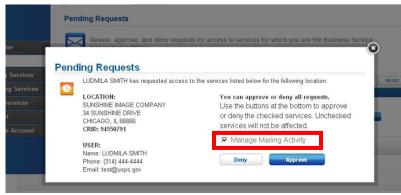
Manage Mailing Activity (MMA)

 Each MMA sub-service description on the Mailing and Shipping Services pages has been updated to include additional verbiage about being part of MMA



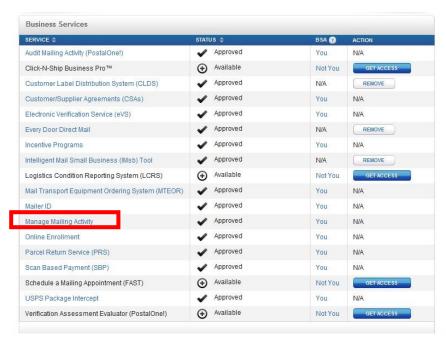
Requesting Access to MMA

- Once you have requested and received access to one of MMA's subservices, you will be granted access to <u>all</u> MMA subservices automatically
- BSA will see "Manage Mailing Activity" in the Pending Request window when someone requests access to one of MMA subservices



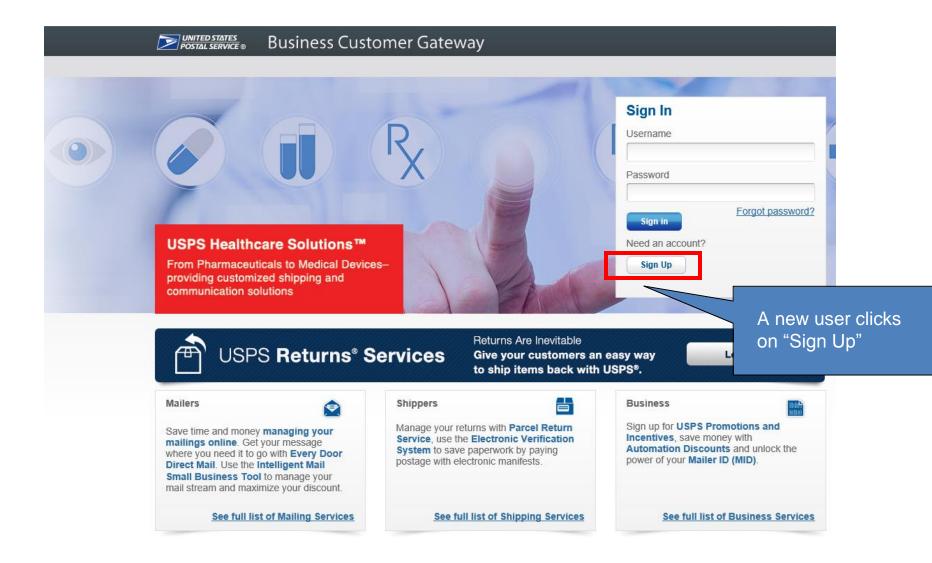
BSA Pending Request Inbox

 <u>Note</u>: suite of MMA services is listed as "Manage Mailing Activity" in the Manage Account – Manage Services tab

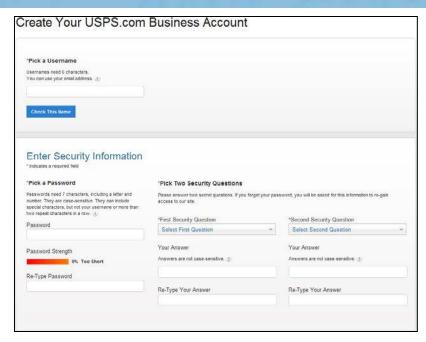


Manage Services Page

New User: 1) Register

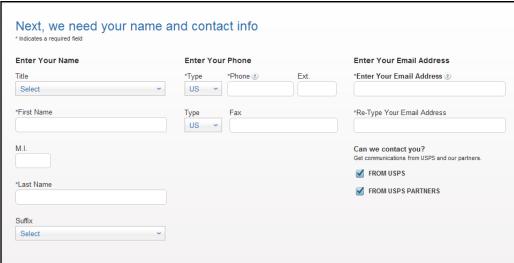


New User: 2) Complete Registration Form



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

Enter name, phone number and email address



New User: 2) Complete Registration Form

Find my address by...

Please enter your address so USPS can find the best deliverable option for you.

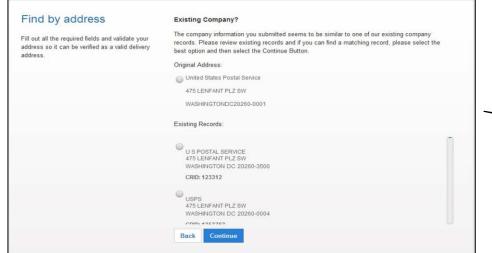


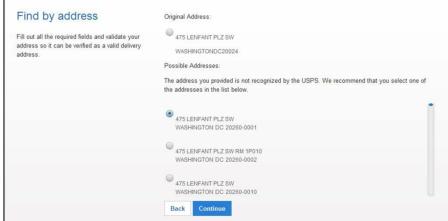




Choose method to enter business location and enter appropriate information

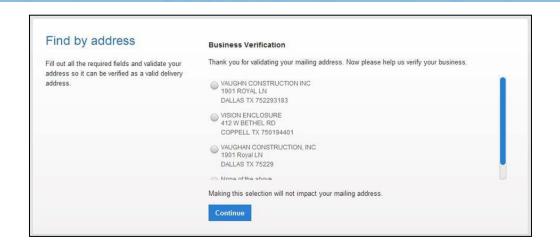
Choose from list of possible addresses or original entry if necessary





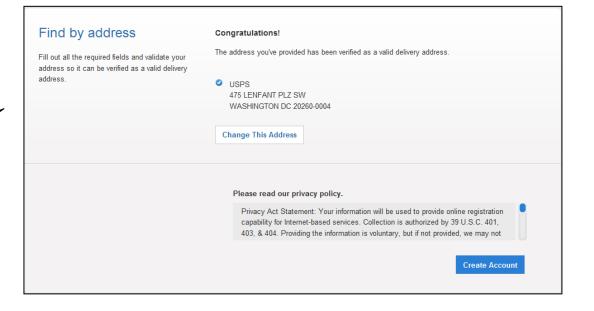
Choose from list of existing companies or original entry if necessary

New User: 2) Complete Registration Form

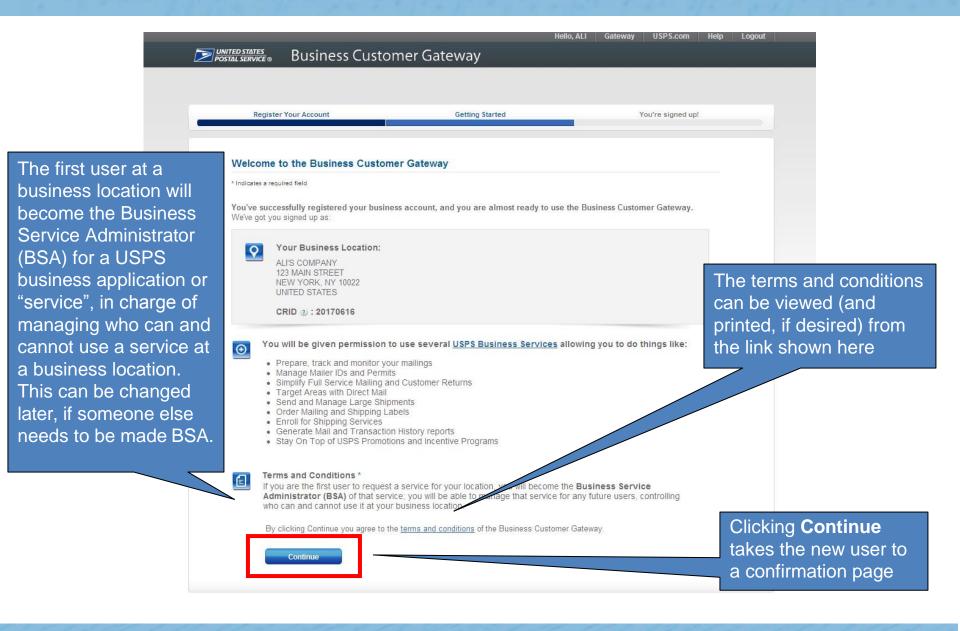


Choose from list of existing verified business location or original entry if necessary

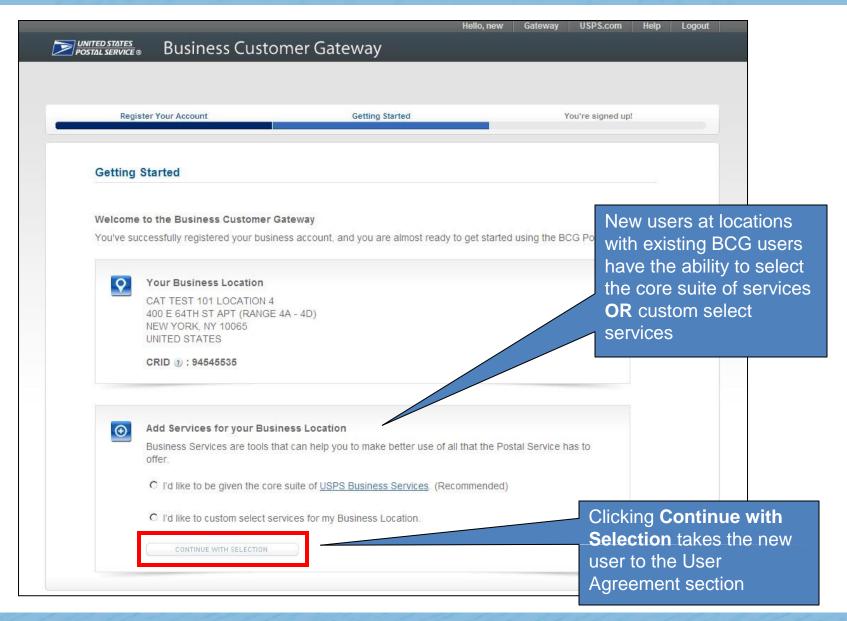
Read privacy policy and click Create Account



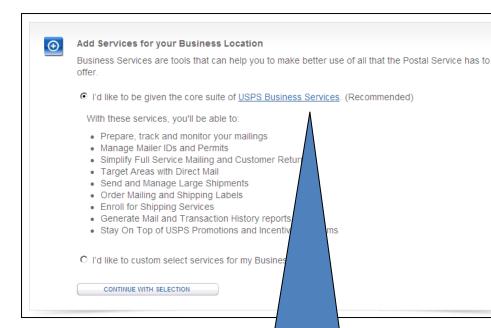
New User at a New Business Location: 3) Terms and Conditions



New User at an Existing Business Location: 3) Terms and Conditions



New User at an Existing Business Location: 3) Terms and Conditions



The services part of the core suite may be found by clicking the USPS Business Services link

The custom service selection option allows users to select individual services OR a bundle

Add Services for your Business Location

Business Services are tools that can help you to make better use of all that the Postal Service has to offer.

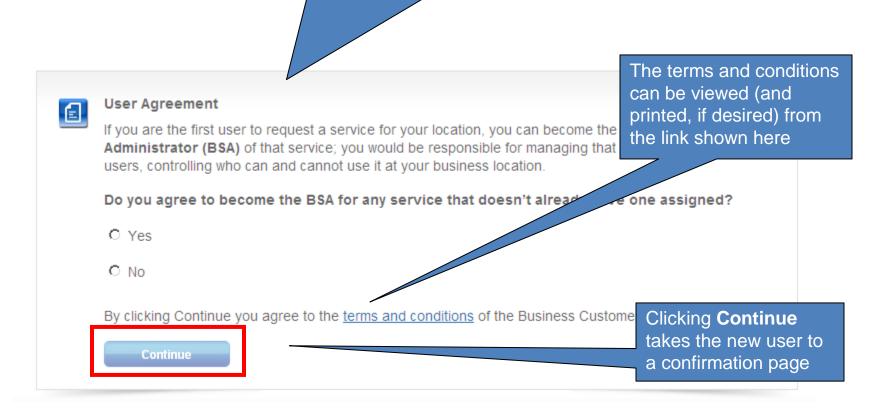
- C I'd like to be given the core suite of USPS Business Services. (Recommended)
- I'd like to custom select services for my Business Location.

*Select at least one service to continue

- Common Services
- ☐ Incentive Programs: Participate in promotions and incentives for business mail.
- Mailer ID: Request and manage Mailer IDs.
- Manage Mailing Activity: Manage your business mailings.
- ☐ Basic Mailing Services
 - Customer Label Distribution System (CLDS): Order bulk, collated or DMM labels online.
- ☐ Customer/Supplier Agreements (CSAs): CSAs define mail preparation requirements and acceptance times
- Every Door Direct Mail: EDDM is designed to help you reach every home, every address, every time.
- ☐ Intelligent Mail Small Business (IMsb) Tool: Produce the IMb for your mailings.
- Schedule a Mailing Appointment (FAST): Schedule a mailing appointment.
- ☐ Basic Shipping Services
- Parcel Return Service (PRS): Work share solution for returning merchandise
- ☐ Electronic Verification Service (eVS): Package mailers can use an electronic manifest to document and pay postage.
- Conline Enrollment: Get started online to apply for eligibility.
- Parcel Data Exchange (PDX): PDX allows business customers to upload manifests and download extracts
- ☐ Premium Forwarding Service Commercial™: Schedule regular reshipment of mail from one or more addresses to a chosen destination.
- ☐ Scan Based Payment (SBP): Scanning = revenue collection.
- USPS Package Intercept: Redirect your mailpiece if it hasn't been delivered.
- □ Additional Shipping Services
- ☐ Click-N-Ship Business Pro™: End-to-end solution for businesses to fulfill their daily shipping needs.
- Cother Services
 - Audit Mailing Activity (PostalOne!): Access your permit or Publication account.
 - ☐ Mail Transport Equipment Ordering System (MTEOR): Order Mail Transport Equipment.
- ☐ Logistics Condition Reporting System (LCRS): Visibility into the transportation and logistics network
- ☐ Verification Assessment Evaluator (PostalOne!): Receive reconciliation and refund notifications.

New User at an Existing Business Location: 3) Terms and Conditions

The new user at a business location with existing BCG users has the **option** to become the Business Service Administrator (BSA) for a USPS business application or "service" that does not currently have a BSA assigned.

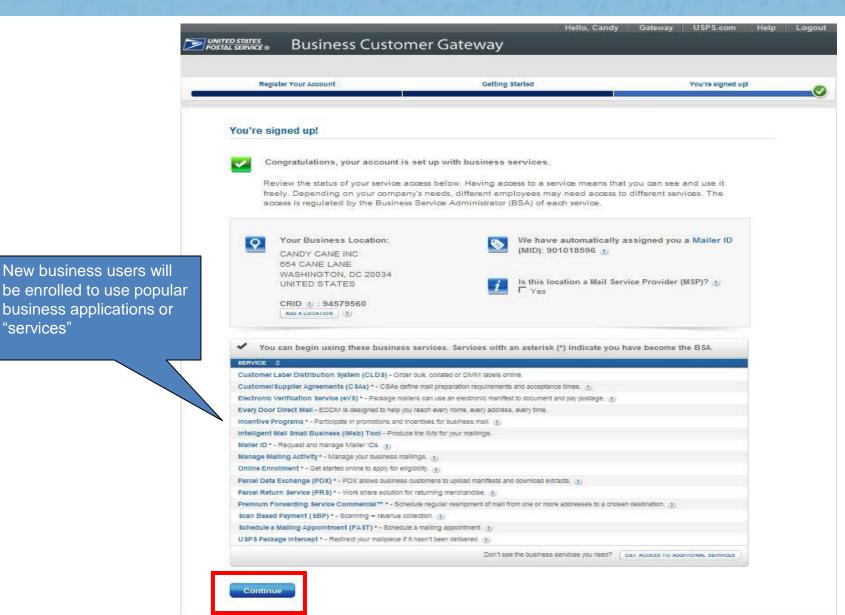


New User: 4) Confirmation Page

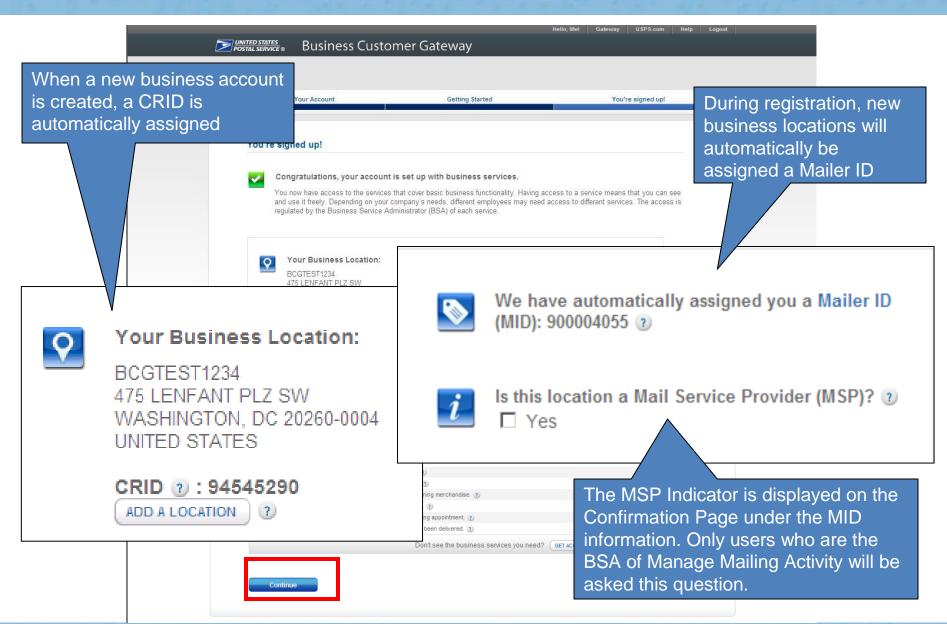
New business users will

business applications or

"services"



Confirmation Page: CRIDs and MIDs



Mail Service Provider (MSP) Pop-up Message

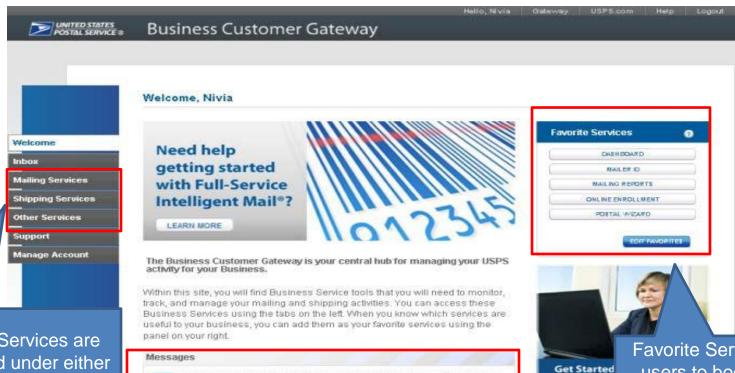
 Upon clicking the question mark displayed next to the word "MSP", users will see a pop-up which provides more details about the role of the Mail Service Provider



A mailing agent (i.e. mail service provider) is an organization, business entity, or individual acting on behalf of one or more mail owners by providing mailing services for which the mail owners compensate the mailing agent.

As a Mail Service Provider, my company certifies to the United States Postal Service that we have been authorized by our customer(s) to act as their mailing agent with the USPS and obtain services for business mailing matters on their behalf.

The BCG Homepage



Business Services are now located under either Mailing, Shipping or Other Services on the left sidebar navigation.
Also featured are links to Inbox, Support and Manage Account functionality

If you are a Mail Service Provider at any of your locations, you can now indicate yourself as such from the Manage Locations tab by clicking the Edit button.

You have service access requests awaiting your approval.

You have 15 pending service requests. You may review them here.

You have 1 message. You may review it here.

Favorite Services allows
users to bookmark the
business services they
utilize the most. When a
user first logs into the new
BCG, the Favorite
Services will default to
preset services

Business Cus

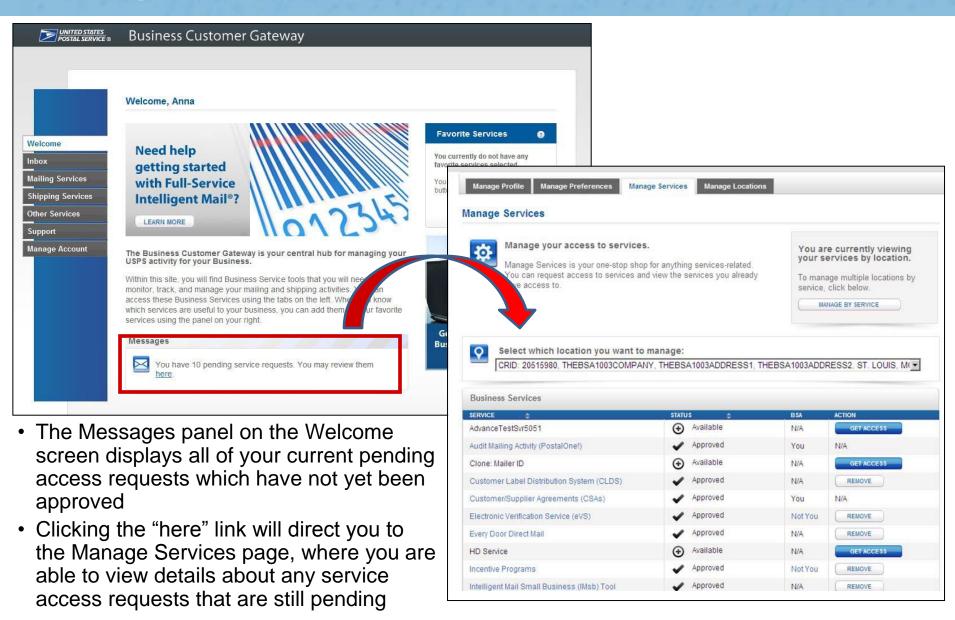
BCG Users now have access to BCG
Messages where they will receive alerts
on pending service requests and
messages

Favorite Services Panel



- The Favorite Services panel allows quick and easy access to the services you use most often.
- Upon logging in for the first time, the panel will default to the following services:
 - Dashboard
 - Mailer ID
 - Mailing Reports
 - Online Enrollment
 - Postal Wizard
- You may edit which services are displayed in your panel by clicking on the Edit Favorites button

Messages Panel



Notifications and Alerts



Welcome, Anna



The Business Customer Gateway is your central hub for managing your USPS activity for your Business.

Within this site, you will find Business Service tools that you will need to monitor, track, and manage your mailing and shipping activities. You can access these Business Services using the tabs on the left. When you know which services are useful to your business, you can add them as your favorite services using the panel on your right.

Notifications and Alerts



FAST Outage - Remedy Case # 5068749 has been opened for an issue that is affecting FAST users. The issue is currently under investigation. Please contact the Help Desk at 1-800-522-9085 for additional information.

Messages

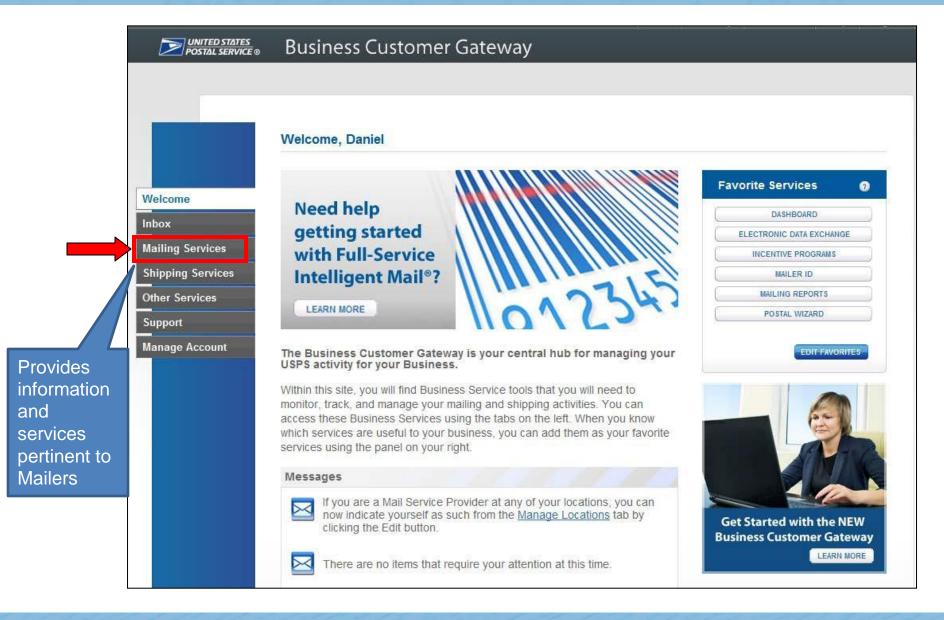


There are no items that require your attention at this time.

 When there are system outages or important announcements, a "Notifications and Alerts" box will appear above the Messages panel



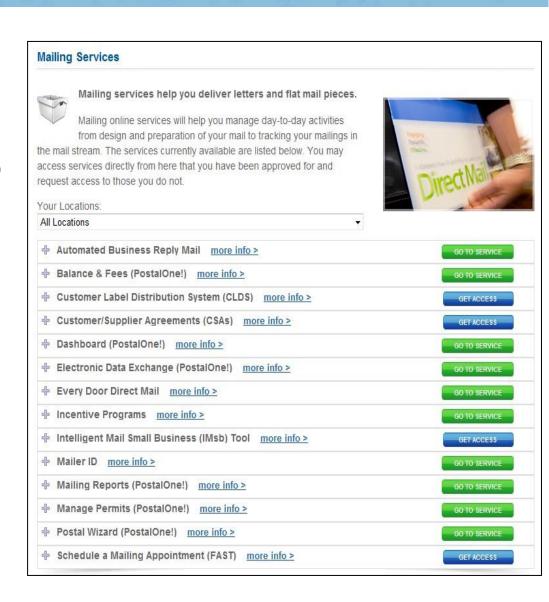
Mailing Services



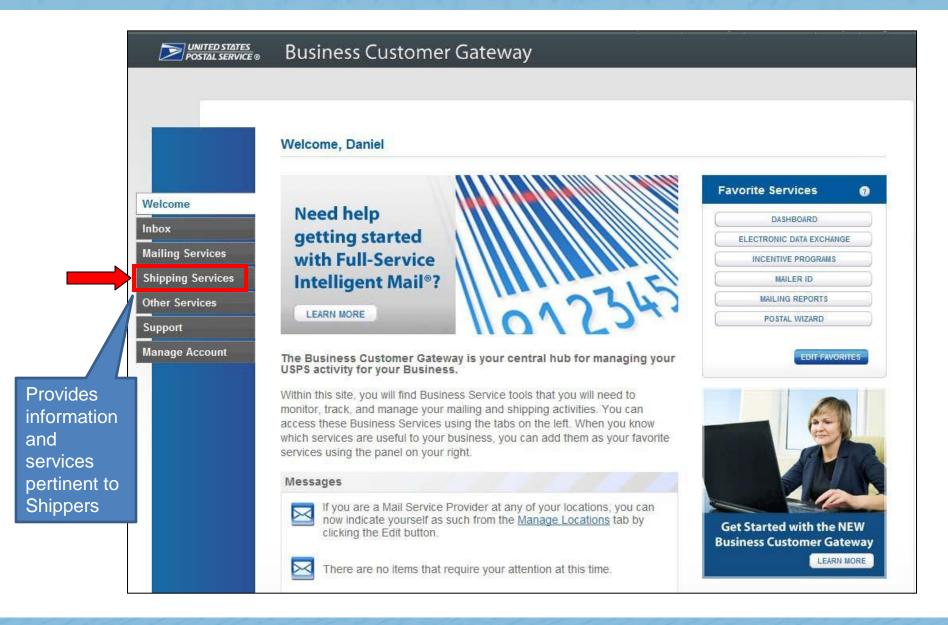
Mailing Services

Options under Mailing Services include:

- Automated Business Reply Mail
- Balance and Fees (PostalOne!)
- Customer Label Distribution System (CLDS)
- Customer/Supplier Agreements (CSAs)
- Dashboard (PostalOne!)
- Electronic Data Exchange (PostalOne!)
- Every Door Direct Mail
- Incentive Programs
- Intelligent Mail Small Business (IMsb) Tool
- Mailer ID
- Mailing Reports (PostalOne!)
- Manage Permits (PostalOne!)
- Postal Wizard (PostalOne!)
- Schedule a Mailing Appointment (FAST)



Shipping Services



Shipping Services

Options under Shipping Services include:

- Balance and Fees (PostalOne!)
- Click-N-Ship Business Pro™
- Dashboard (PostalOne!)
- Electronic Data Exchange (PostalOne!)
- Electronic Verification Service (eVS)
- Incentive Programs
- Mailer ID
- Mailing Reports (PostalOne!)
- Manage API
- Manage Permits (PostalOne!)
- Official Mail Shipping Labels
- Online Enrollment
- Parcel Data Exchange (PDX)
- Parcel Return Service (PRS)
- Postal Wizard (PostalOne!)
- Premium Forwarding Service Commercial
- Print & Deliver Shipping Label
- Scan Based Payment (SBP)
- USPS Package Intercept

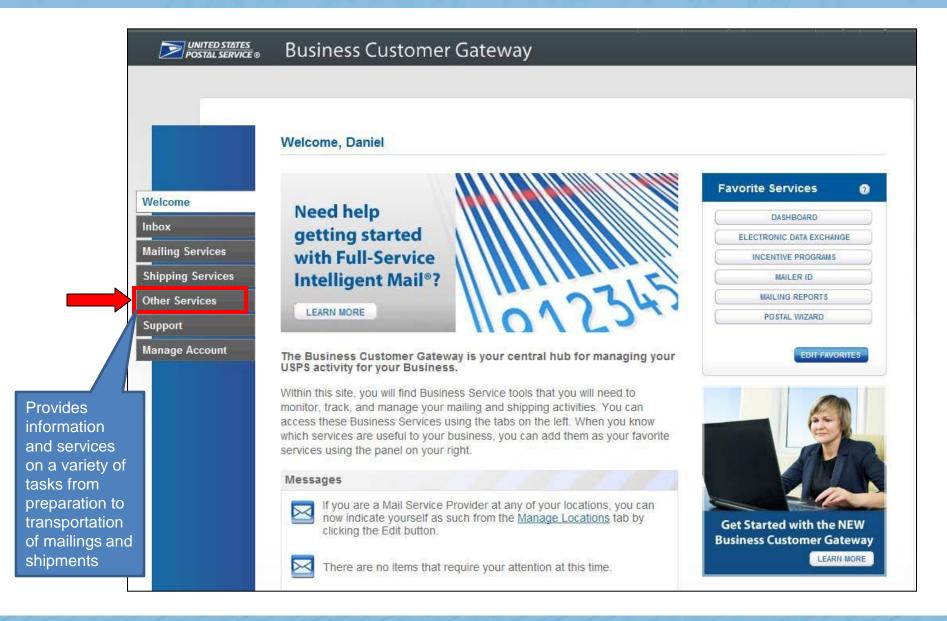
Shipping Services





All Locations	7
⊕ Balance & Fees (PostalOne!) more info >	GO TO SERVICE
Click-N-Ship Business Pro [™] more info ≥	GO TO SERVICE
Dashboard (PostalOne!) more info >	GO TO SERVICE
Electronic Data Exchange (PostalOne!) more info ≥	GO TO SERVICE
→ Electronic Verification Service (eVS) more info >	GO TO SERVICE
Incentive Programs more info ≥	GO TO BERVICE
Mailer ID more info ≥	GO TO BERVICE
Mailing Reports (PostalOne!) more info ≥	GO TO SERVICE
	GO TO SERVICE
→ Manage Permits (PostalOne!) more info >	GO TO BERVICE
→ Official Mail Shipping Labels more info ≥	GO TO SERVICE
Online Enrollment more info ≥	GO TO BERVICE
Parcel Data Exchange (PDX) more info ≥	GO TO BERVICE
Parcel Return Service (PRS) more info ≥	GO TO SERVICE
Postal Wizard (PostalOne!) more info ≥	GO TO SERVICE
Premium Forwarding Service Commercial™ more info ≥	GO TO SERVICE
Print & Deliver Shipping Label more info ≥	GO TO SERVICE
	GO TO BERVICE
	GO TO SERVICE

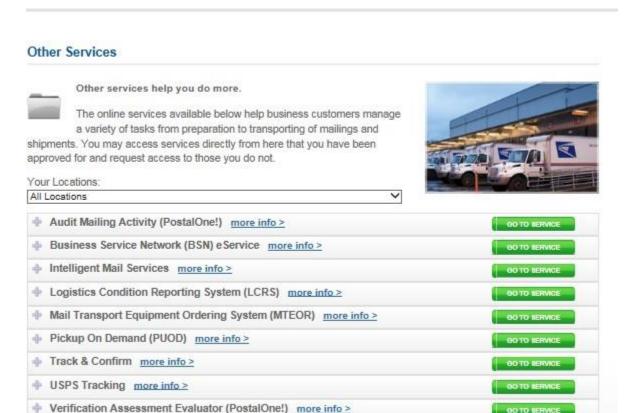
Other Services



Other Services

Options under Other Services include:

- Audit Mailing Activity (PostalOne!)
- **Business Service Network** (BSN) eService
- Intelligent Mail Services
- **Logistics Condition Reporting** System (LCRS)
- Mail Transport Equipment Ordering System (MTEOR)
- Track & Confirm
- USPS Tracking
- Verification Assessment Evaluator (PostalOne!)



GO TO SERVICE

Streamlined Services Functionality

- BCG has streamlined the process for requesting and receiving access to business services by allowing you to request, view, and receive service access all from one screen
- Users will see a visual representation of what services they currently have, which services are pending, and which services they do not yet have



Pending Access Statuses

There are two types of pending statuses users may see (represented in the Mailing, Shipping, and Other Services tabs with orange color). They are:

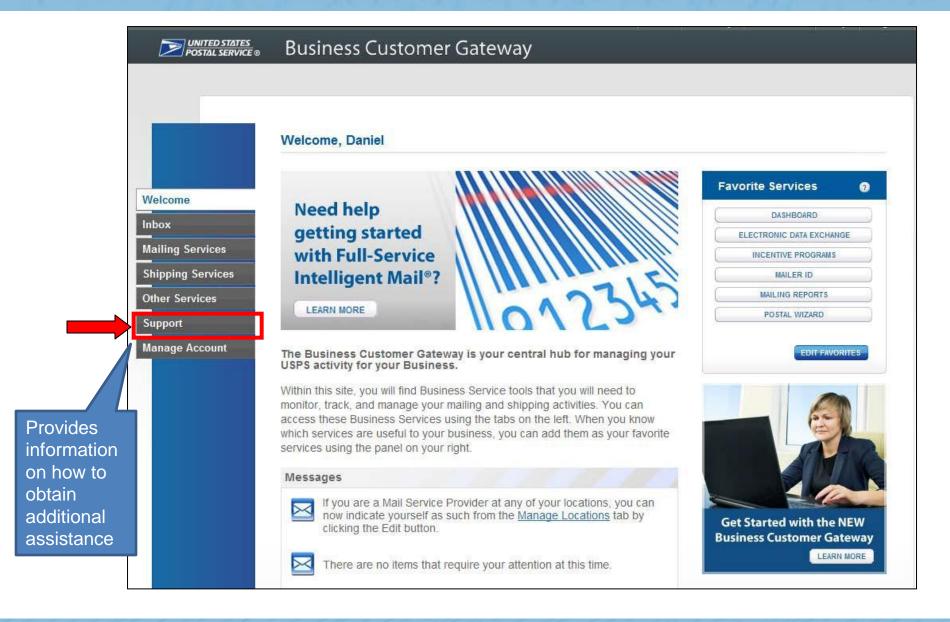
Pending BSA

 Indicates that the BSA for that service must approve your request before you receive access.

Pending External BSA

 The service requested (e.g. Incentive Services) is contingent upon another service (e.g. Manage Mailing Activity) and therefore requires permission from the contingent service's BSA

Support



Support

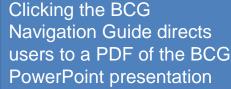
Welcome Inbox **Mailing Services**

Shipping Services

Other Services Support

Manage Account

Support



Need help?

You've got questions, we've got answers. Below you can find the information to support your mailing and shipping needs.



BCG Navigation Guide



Need to manage BSA assignments?



Online Support

Send us an email, and one of our Customer Service Representatives will get back to you by the next business day: postalone@usps.gov

Get Started with Full-Service Learn more about the BCG

Mail Service Provider (MSP) Tools National Customer Support Center (NCSC)

Postal Explorer

Track & Confirm USPS News & Information

USPS.com

Vendor list for Full Service Software



Live Support

For general information, call us at (800) 522-9085.

Mon-Fri: 7:00 A.M. to 7:00 P.M. (CT) Sat/Sun/Holidays: Closed

Additional Support Contact Information



BCG Service Information

Browse through our shipping and mailing services articles which will assist you with your questions.

Electronic Verification System (eVS) Every Door Direct Mail (EDDM) Incentives & Promotions Parcel Return Service (PRS) PostalOne!

Directs users to the RIBBS **Business Customer** Gateway page

Support

Welcome

Inbox

Mailing Services

Shipping Services

Other Services

Support

Manage Account

Support



Need help?

You've got questions, we've got answers. Below you can find the information to support your mailing and shipping needs.





Need to manage BSA assignments?



Clicking this link triggers the below message box to appear, which includes more information about BSA assignments



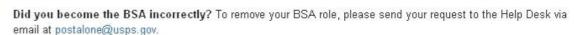


USPS.com

Send us an email, and one of our Customer Service Representatives will get back to you by the next business day: postalone@usps.gov

Get Started with Full-Service
Learn more about the BCG
Mail Service Provider (MSP) Tools
National Customer Support Center
(NCSC)
Postal Explorer
Track & Confirm
USPS News & Information

Vendor list for Full Service Software



The following information should be included in the request:

- . CRID and service(s) you would like to be removed as BSA
- Contact info
- Username

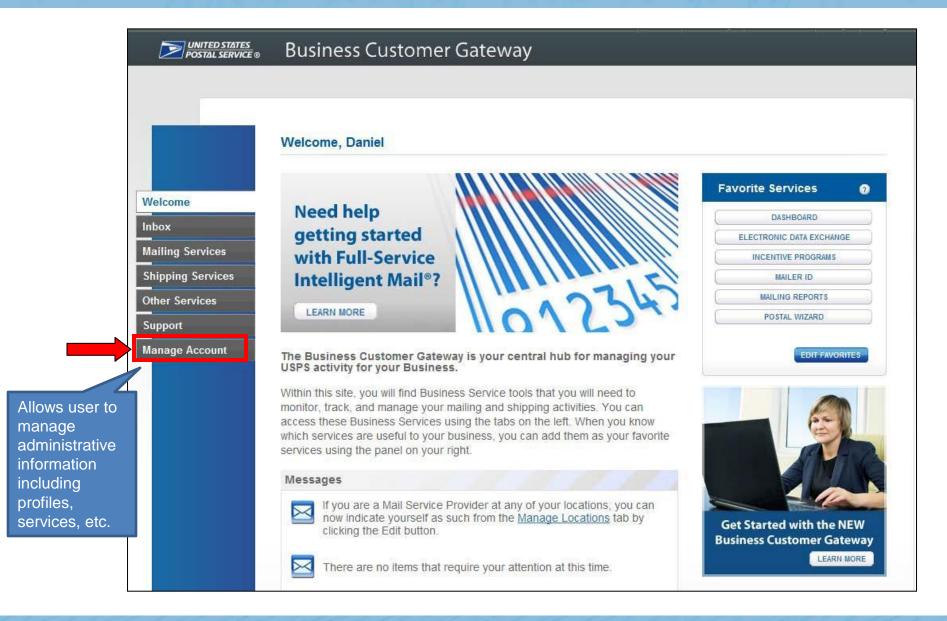
Has your BSA left the company? If the BSA for your business location is no longer with the company, and should be transitioned to another user, please send your request to the Help Desk via email at postalone@usps.gov.

The following information should be included in the request:

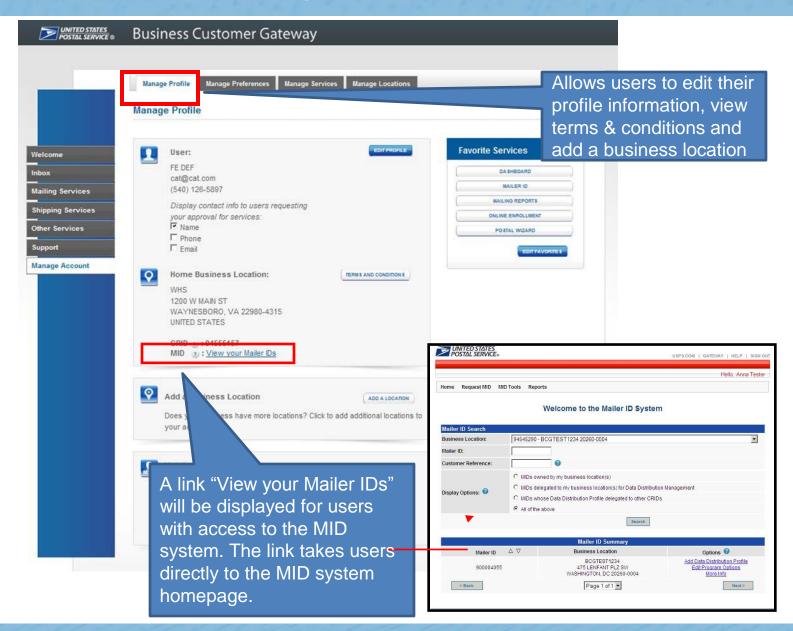
- . CRID and service(s) for which the BSA should be removed
- . Username of the new BSA



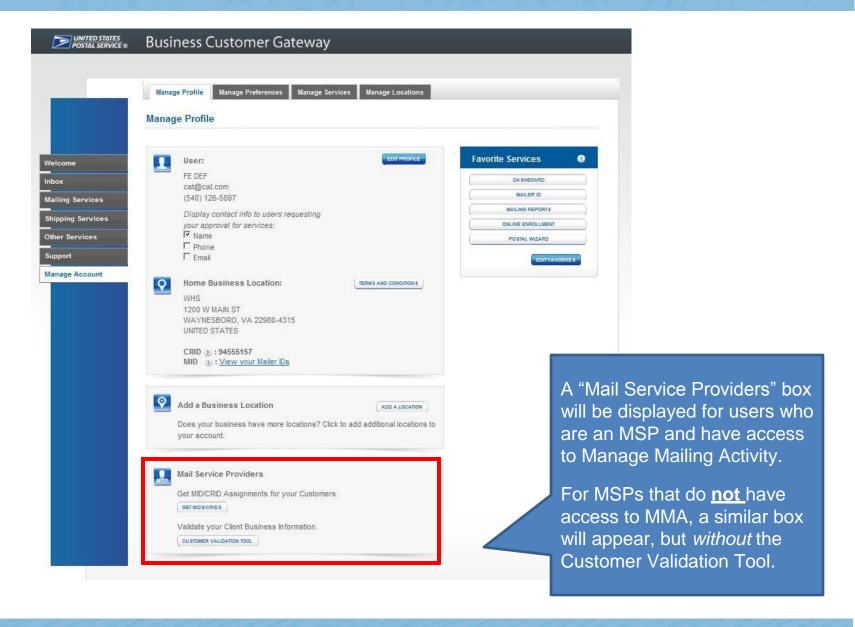
Manage Account



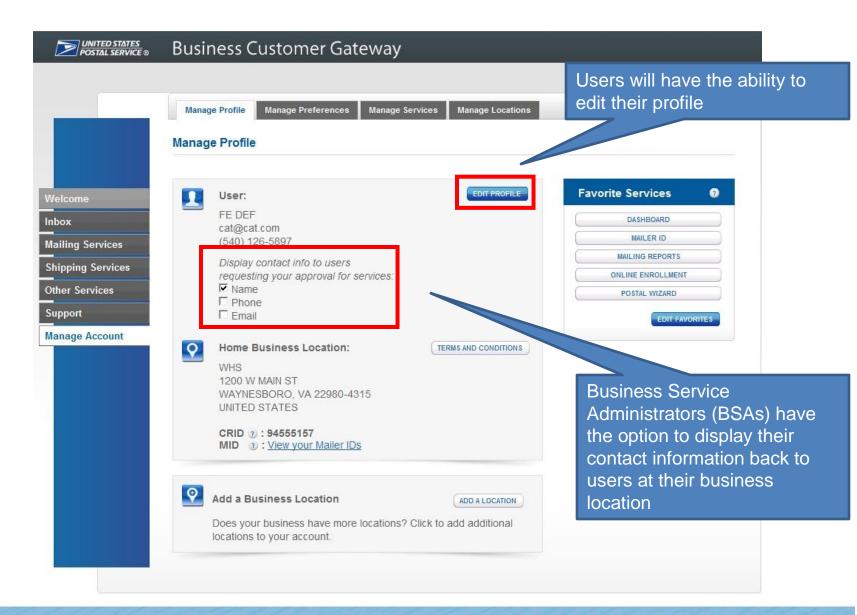
Manage Account - Manage Profile



Manage Account – Manage Profile: MSP Box



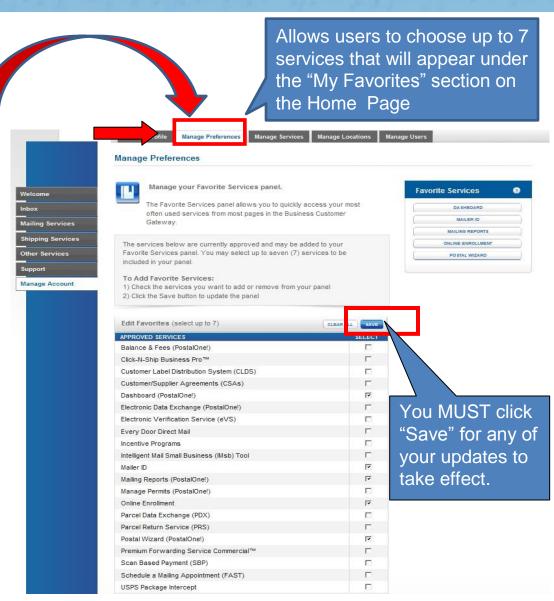
Manage Account – Manage Profile: BSA Preferences



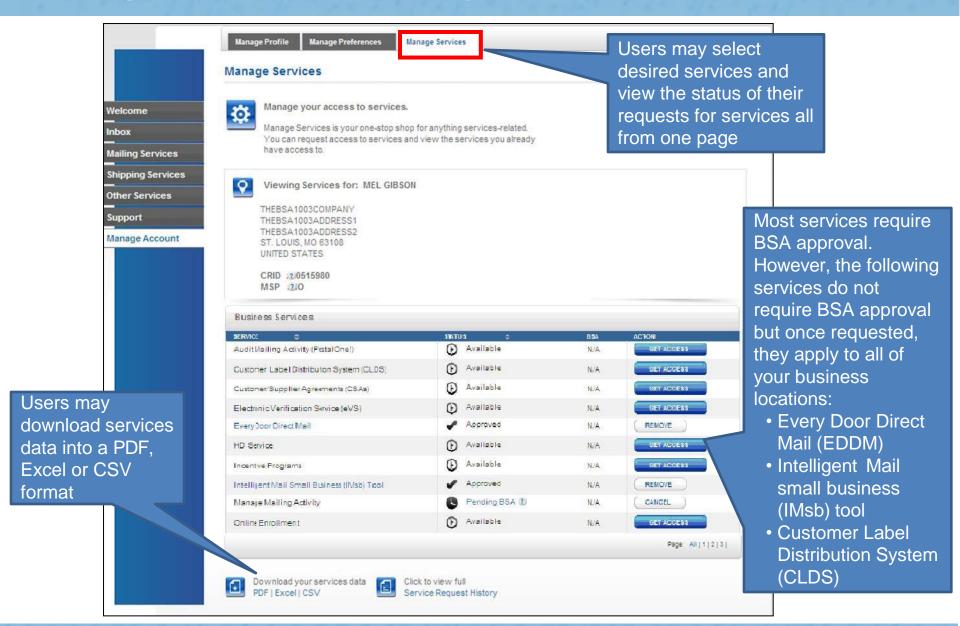
Manage Account - Manage Preferences



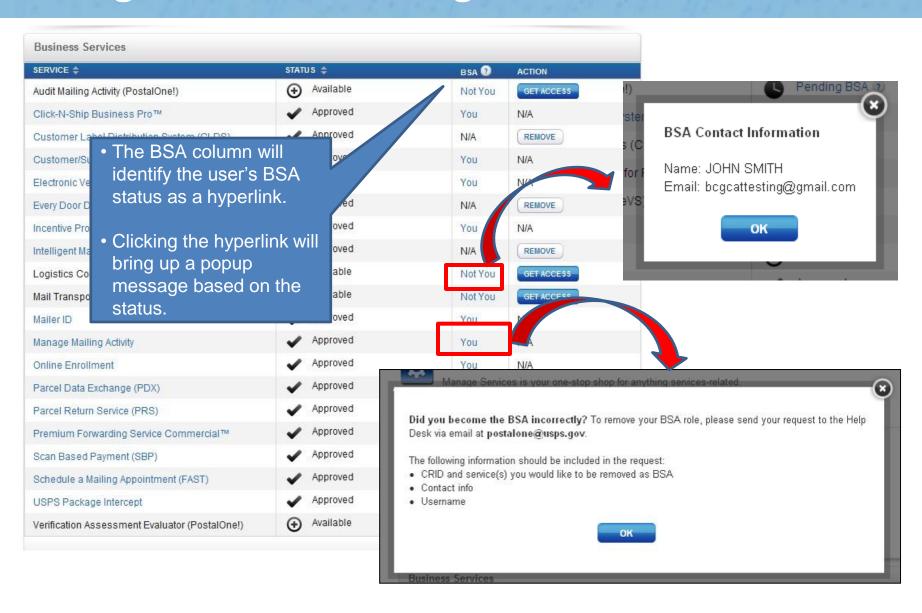
- Clicking Edit Favorites will direct you to the Manage Preferences screen
- On this page, you are able to select up to seven services for display in your Favorite Services panel



Manage Account – Manage Services

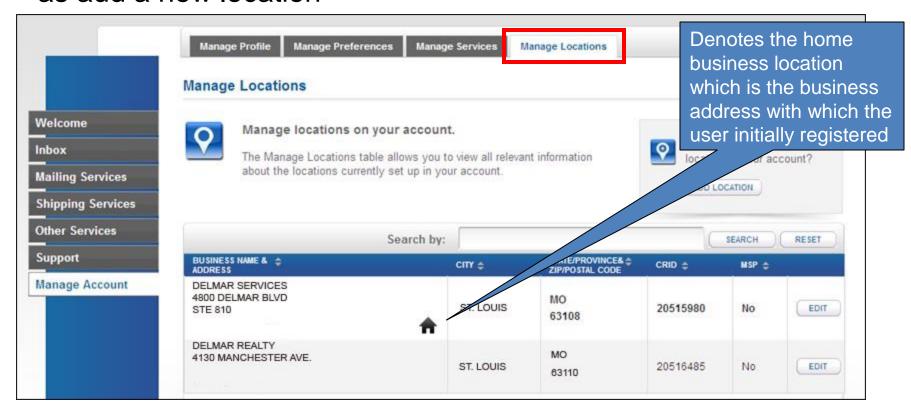


Manage Account – Manage Services: BSAs



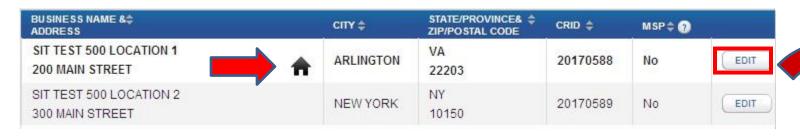
Manage Account: Manage Locations

- All users will see a "Manage Locations" tab under the Manage Account section
- This page allows you to view and edit all relevant information, including MSP designation, about your business locations as well as add a new location

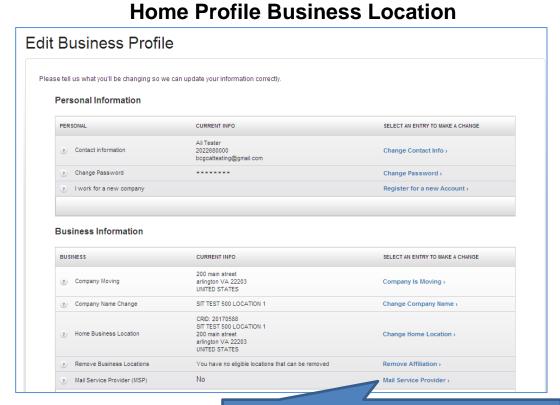


Note: You must be the BSA to edit any location other than the Home location

Edit MSP Status – Home Business Location



Clicking the "Edit" button for your home business location will direct you to the Edit **Business Profile** page, where you are able to change and update your profile business location information

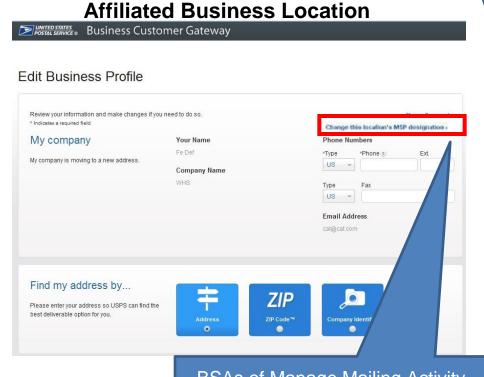


BSAs of Manage Mailing Activity have the option of editing the MSP status

Edit Business Locations

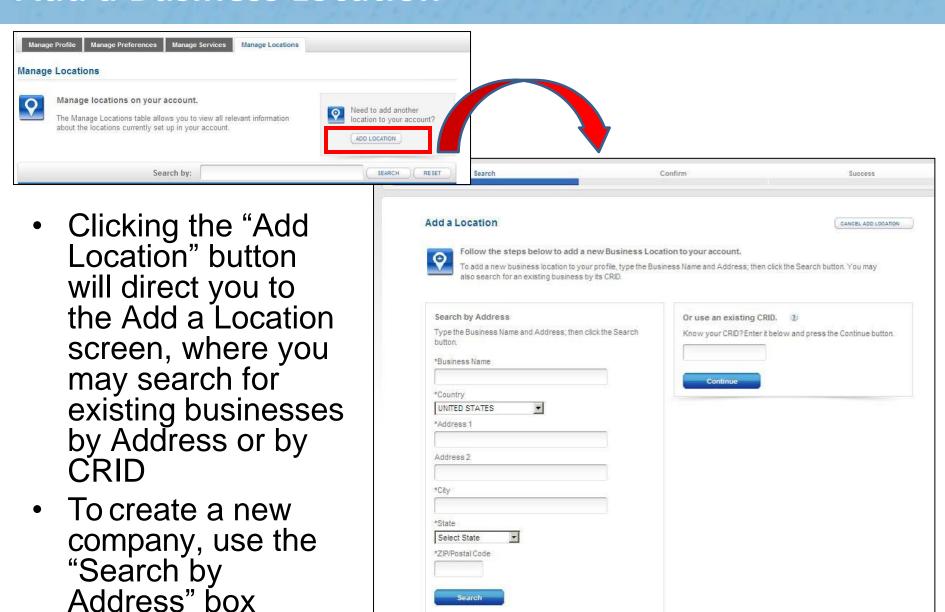


Clicking the "Edit"
 button will direct
 you to the Edit
 Affiliated Business
 Locations page,
 where you are
 able to change
 and update only
 the selected
 business location
 information

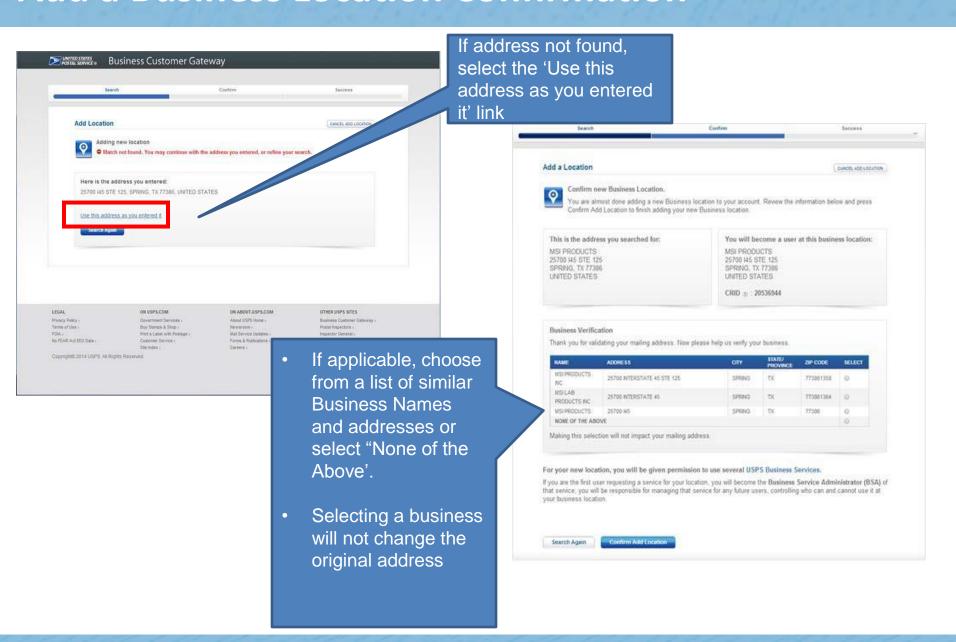


BSAs of Manage Mailing Activity have the option of editing the MSP status for secondary locations from the Edit Business Profile page

Add a Business Location

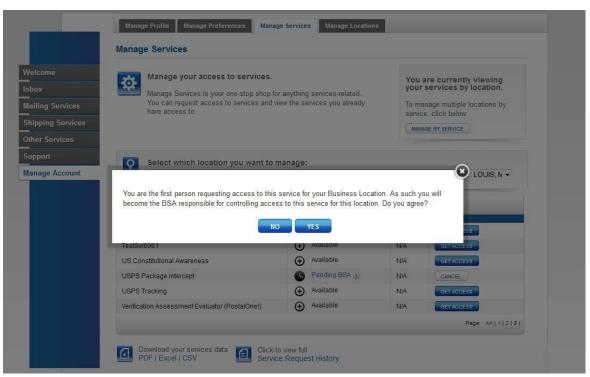


Add a Business Location Confirmation



Requesting Business Services

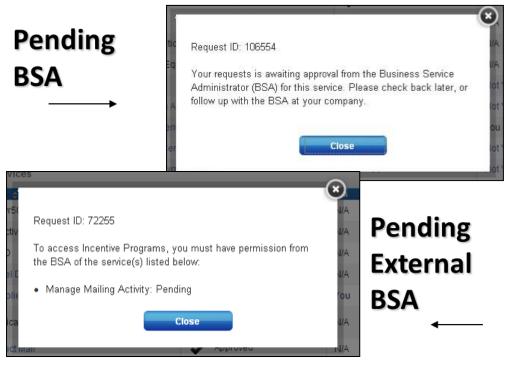
- If you are the first person to request access to a certain service, you
 will become the BSA for that service.
- If there are other users at your location and no one is yet the BSA, you will be prompted with the message displayed below
 - If you choose YES, you will become BSA of the service
 - If you choose NO, your request will be submitted and put into a Pending BSA status



Pending Access Statuses

Pending statuses are displayed as hyperlinks in the Status column on the Manage Services page. Upon clicking the status, a message box is displayed with more details about your pending service request.







Managing Multiple Locations and/or Multiple Users

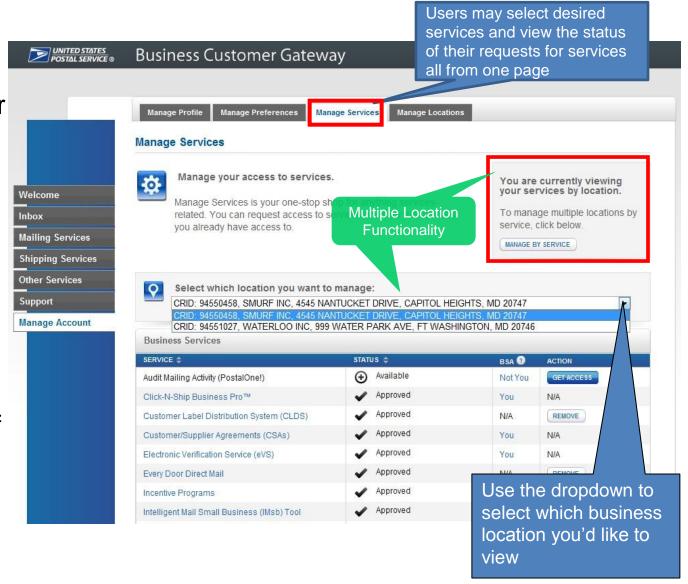
Objectives

- Previously, we discussed functionality and scenarios that were applicable to all users, with a focus on single users within a single location
- Now, we will discuss functionality and scenarios that are more complex and applicable to multiple users and multiple locations

Manage Account – Manage Services (Multiple Locations)

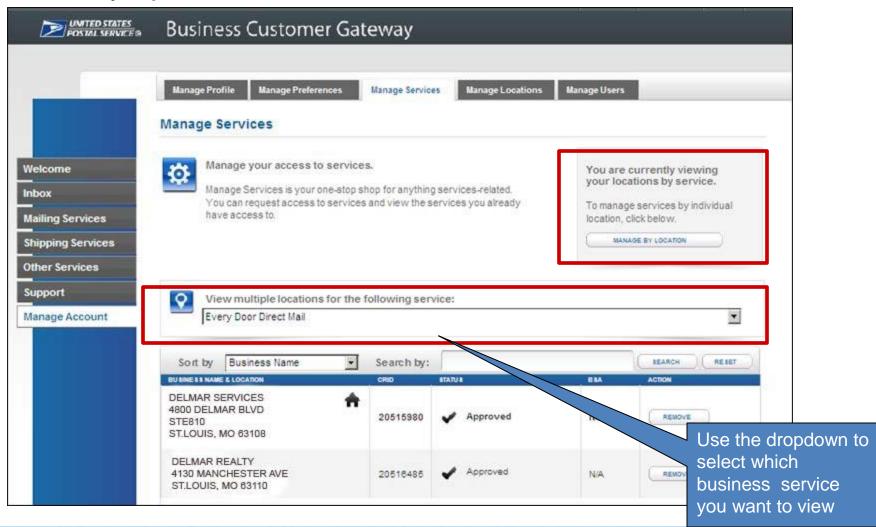
Users with <u>multiple</u> business locations associated to their account are able to view the "Manage Services" functionality by **Location** or by **Service** via the gray box in the upper right corner of the screen.

 This is the view of services by location. Click the "Manage By Service" button to switch the view.



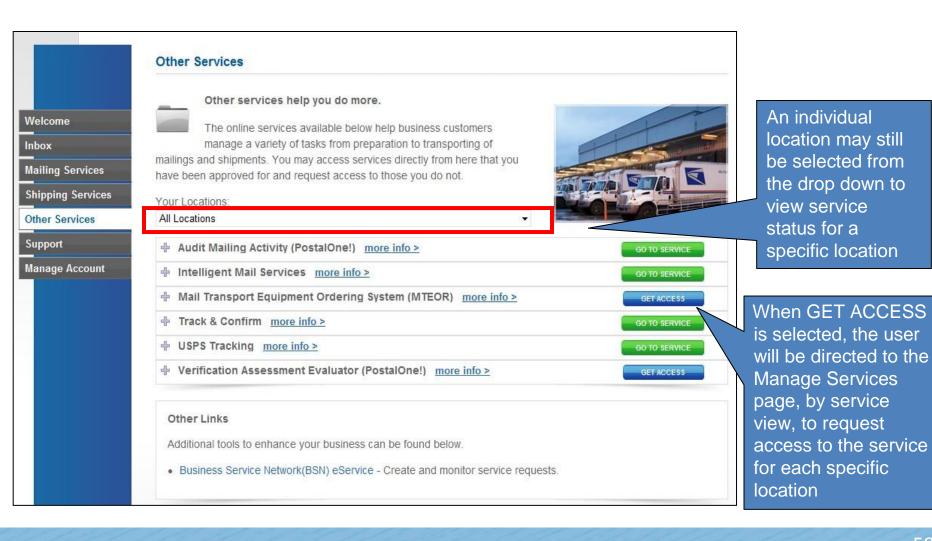
Manage Account - Manage Services (Multiple Locations)

 Below is the view for managing services by service rather than by specific business location.



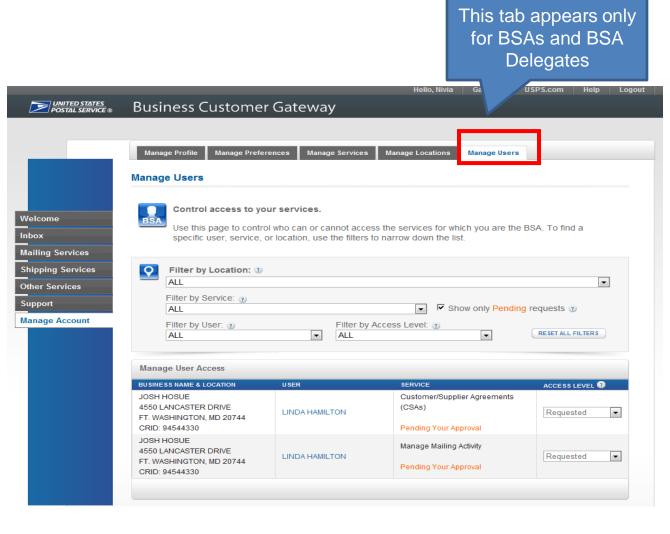
Services Pages (Multiple Locations)

 The Mailing, Shipping, and Other Services pages will default to an aggregate view of service status for users with multiple locations

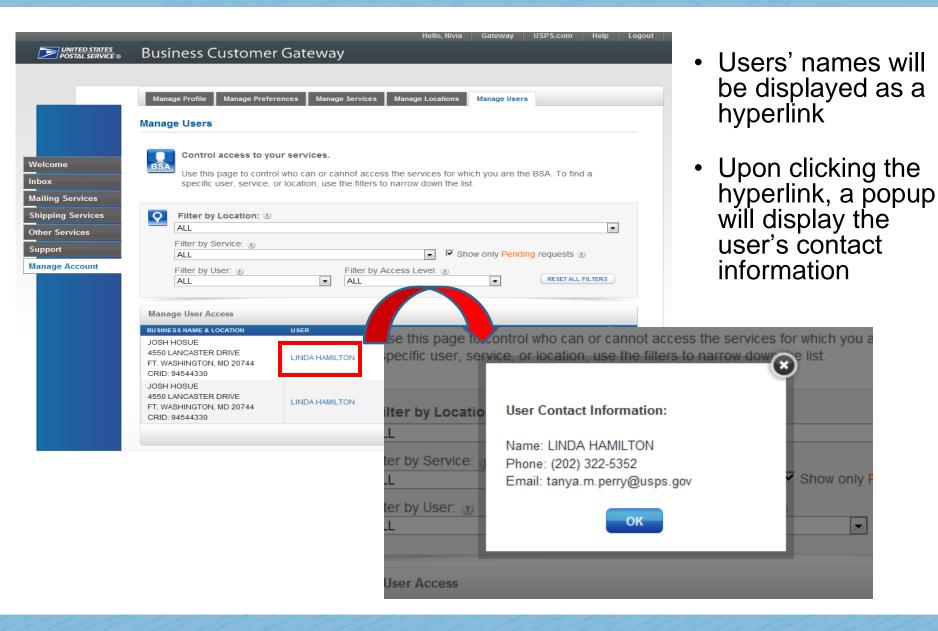


BSAs: Manage Users Tab

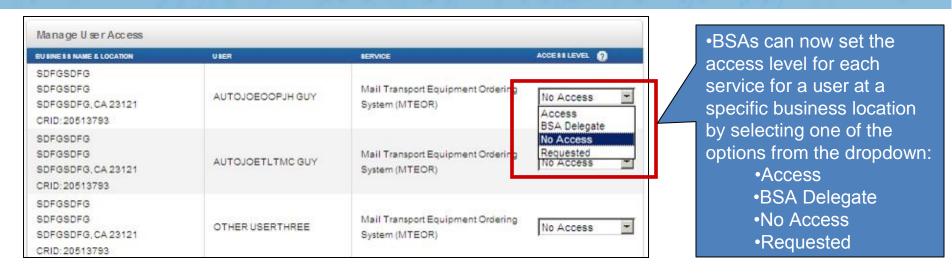
- Business Service
 Administrators, and
 delegates, will see an
 additional tab within
 Manage Account
 called "Manage
 Users" when there
 are additional users
 who have access to
 the services/locations
 for which they are the
 BSA
- This tab enables BSAs to control the level of access users can have to these services
- Information may be filtered by:
 - Location
 - Service
 - User
 - Access Level



BSAs: Manage Users Tab – User Hyperlink



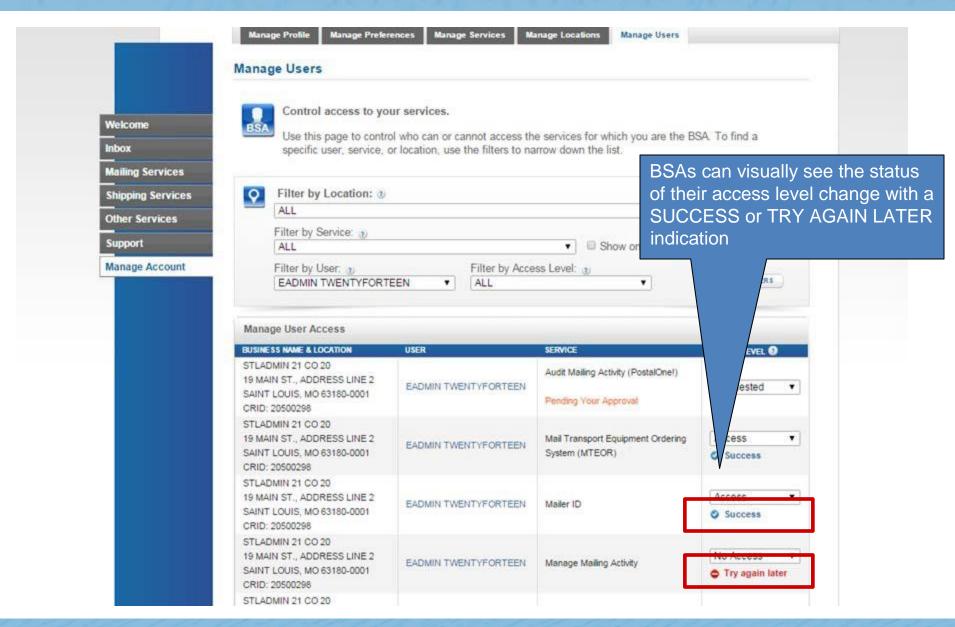
Managing User Access: Access Levels



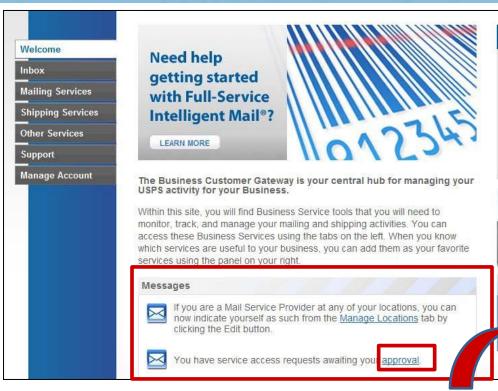
- Access: provides user with access to the service for that business location
- <u>BSA Delegate</u>: allows user to approve/deny requests for that service & location on your behalf
 - User will receive same Inbox privileges as BSA
- No Access: denies user access to the service for that location
- Requested: will default to this when the user has requested access and the BSA hasn't taken action yet

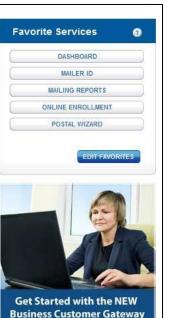


Managing User Access: Access Levels



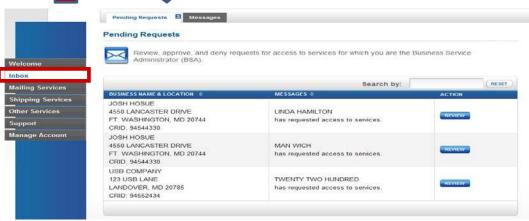
BSA Messages Panel





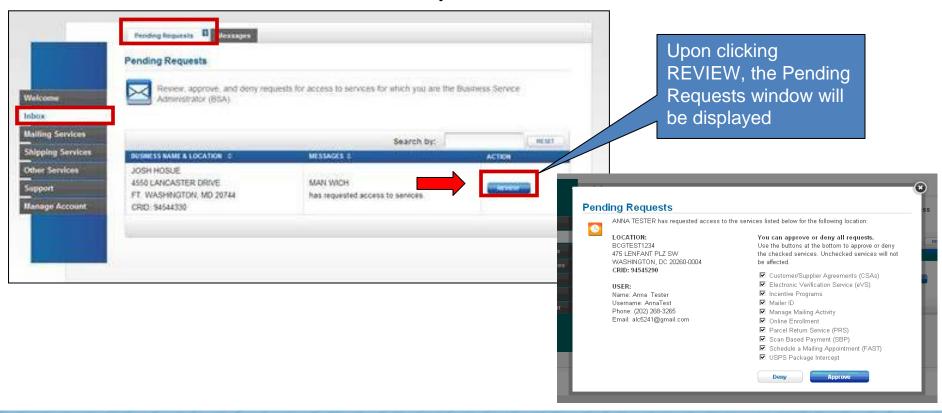
LEARN MORE

- BSAs will see this message in their Messages Panel when another user has requested access to services at their business location
- Clicking "approval" directs BSAs to their Inbox



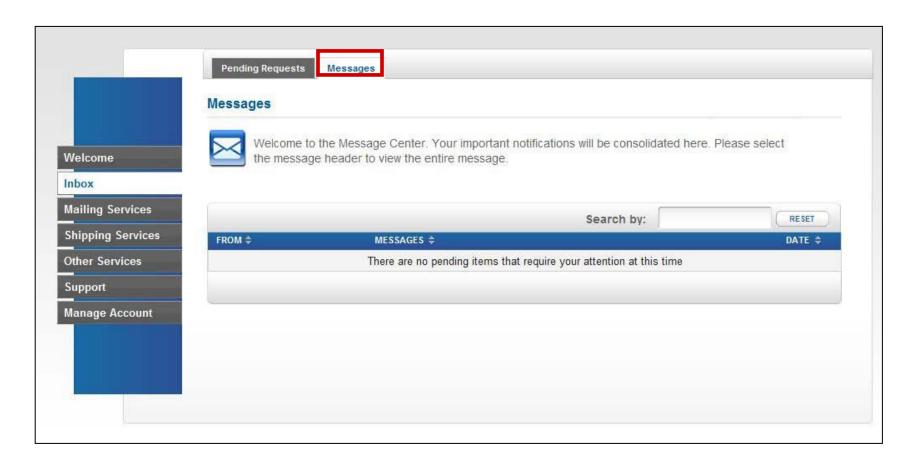
Inbox: BSA and BSA Delegates

- Inbox contains two tabs: Pending Requests and Messages
- Pending Requests tab functionality is for BSAs and BSA delegates only
 - Allows BSAs and BSA delegates to view, approve, and deny and requests for access to services for which they are the BSA



Inbox: Non-BSA

- The second tab of the Inbox, "Messages", is meant for all users
 - Acts as a Message Center for important notifications



Additional Resources

"Lifecycle of a Full-Service Mailing within the BCG" Presentation

- Learn how the BCG supports Full-Service mailers
- https://ribbs.usps.gov/intelligentmail_presentations/doc uments/tech_guides/FullServiceBCGNov2013.pdf
- For additional information:
 - Contact the Help Desk
 - 800-522-9085
 - postalone@usps.gov
 - Support Page https://gateway.usps.com/eAdmin/view/support