

# MSP Balance Check

# MSP Balance Check Capability

USPS has enabled the ability for MSPs to perform a balance check for EPS and Local Trust accounts at the permit level.

- A user will not be able to retrieve balance information for permits associated to CAPS accounts
- 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 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.

**BUSINESS CUSTOMER GATEWAY** Home Hello Core!

Mailing Services Shipping Services HCR Services Additional Services Alerts Pending Requests Manage Account USPS.com Help

## Welcome, Core MailerOne

CORE MAILERONE (94542872), 5143 ROSEMOUNT DR, WELDON SPRING, MO 63304-7581

**Next Permit Fee:** No Permit Fees [Balance and Fees](#)

### Account Overview

Access to the Enterprise Payment System is required for this information. Request access to the Enterprise Payment System.

### Mailer Scorecard

eDoc Submitter Mail Preparer Mail Owner

April 2021

You either do not participate in this program, or we have yet to receive data for this CRID.

[Mailing Report](#)

### Favorite Services [Edit](#)

- Dashboard >
- Incentive Programs >
- Mailer ID >
- Online Enrollment >
- Postal Wizard >

<https://gateway-cat.usps.com/eAdmin/action/addservice/getServiceTab?tabID=2>

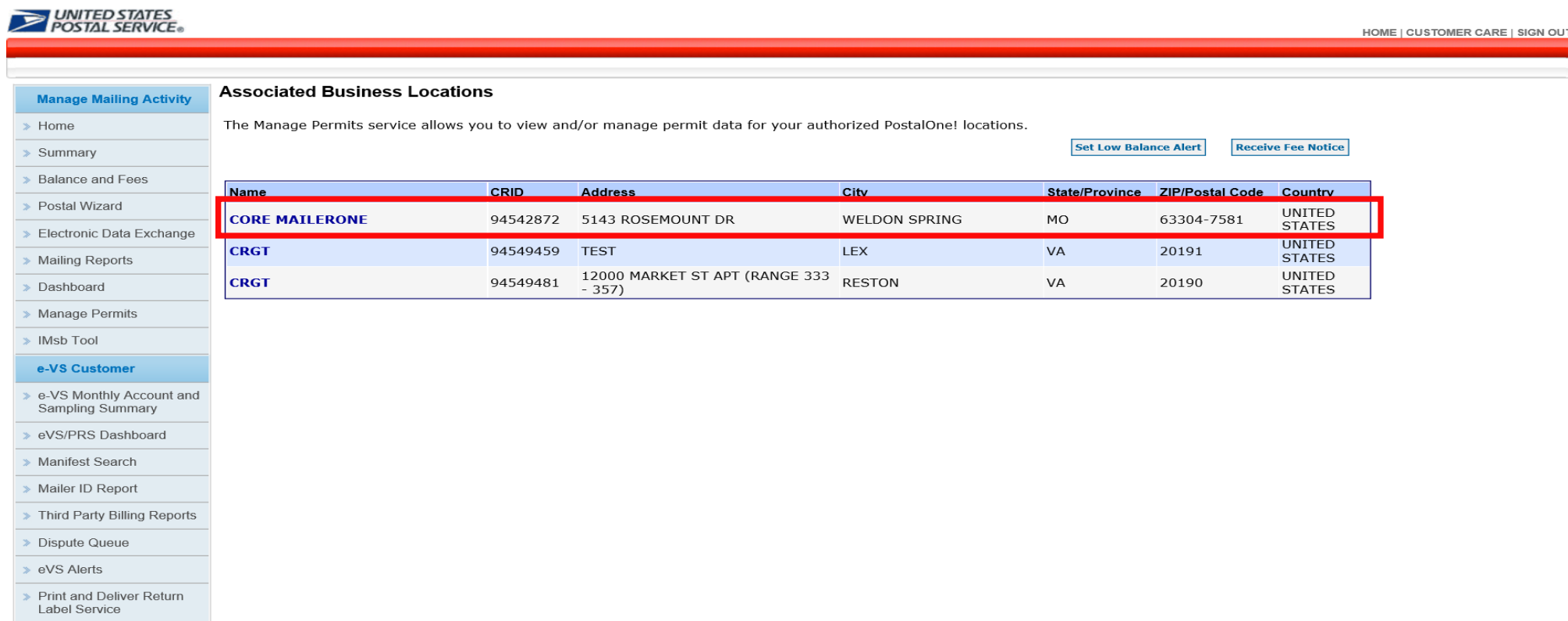
# Permit Holder Grant Permission Process Cont.

Within the Mailing Service area navigate to Manage Permits service.

+ Enhanced Barcode Diagnostics <a href="#">more info &gt;</a>	Get Access
+ Every Door Direct Mail <a href="#">more info &gt;</a>	Go to Service
+ Incentive Programs <a href="#">more info &gt;</a>	Go to Service
+ Informed Visibility <a href="#">more info &gt;</a>	Get Access
+ Intelligent Mail Small Business (IMsb) Tool <a href="#">more info &gt;</a>	Go to Service
+ Mailer ID <a href="#">more info &gt;</a>	Go to Service
+ Mailer Visibility <a href="#">more info &gt;</a>	Get Access
+ Mailing Reports (PostalOne!) <a href="#">more info &gt;</a>	Go to Service
<b>+ Manage Permits (PostalOne!) <a href="#">more info &gt;</a></b>	<b>Go to Service</b>
+ Picture Permit Indicia <a href="#">more info &gt;</a>	Get Access
+ Postal Wizard (PostalOne!) <a href="#">more info &gt;</a>	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.



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### 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
<b>CORE MAILERONE</b>	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

**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

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

# 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:

Add >

<< Remove All

< Remove

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 All

Show  entries

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	poneTest	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	poneApple	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	

Once in the MSP Balance Check Authorization then the Permit Holder needs to select which MSPs to grant permission:

1. Select specific MSP CRID number or MSP Name (Green)

Once Permit Holder has selected the MSP CRID then they need to select which permits the MSP will be able to see the balance information. The permit holder will have the ability to apply to all Permits or specify a specific permit(s). (Blue)



# 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 profile section shows "Manage Account" with a dropdown menu open, highlighting "Manage Profile". Other menu items include "Manage Favorites", "Manage Services", "Manage Locations", "Manage Users", and "Log Out". The main content area features a "Welcome, Core MailerOne" message and a dropdown menu for account selection. Below this, there are sections for "Account Overview" (with a message about Enterprise Payment System access), "Mailer Scorecard" (for April 2021), and a "Mailing Report" link. A footer URL is visible at the bottom left: "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

## Home Business Location

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CORE MAILERONE 5143 ROSEMOUNT DR WELDON SPRING, MO 63304-7581 UNITED STATES	Customer Registration ID (CRID) ⓘ 94542872	Mailer ID (MID) ⓘ <a href="#">View your Mailer IDs</a>
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### 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. <a href="#">Get MIDs/CRIDs</a>	<b>Validate your Client Business Information.</b> <a href="#">Customer Validation Tool</a>
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# Customer Validation Tool Search Cont.

**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  
MID  
**Permit Information**  
Scheduler ID  
Nonprofit  
**Bulk Search**  
Nonprofit Association Validation

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

### 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

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# Customer Validation Tool – Permit Information Search

## Permit Information Search Results

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

### 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	<b>Permit_2021419134240_184410.xlsx</b>

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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.