IMb is as Easy as
1 – 2 – 3

Full-Service Intelligent Mail Options
For Small Businesses

September 2016

Agenda

→ **What is Full-Service?**

▶ **Benefits of Full-Service**

▶ **Getting Started**

▶ **Intelligent Mail Barcode**

▶ **Postage Statement Submission**

What is Full-Service?

End-to-end visibility into the mail stream

Full-Service

Full-Service Intelligent Mail®

Full-Service uses Intelligent Mail barcodes on all mailpieces, handling units (trays, sacks), and mail containers. Full-Service is the "oil" that makes Seamless Acceptance and eInduction work!

Seamless Acceptance

eInduction

Agenda

▶ **What is Full-Service**

➡ **Benefits of Full-Service**

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▶ **Postage Statement Submission**

Benefits of Full-Service

- **Savings with Full-Service**
  - Per piece discounts
- **Permit Fee Waiver**
  - Additional annual savings
- **Free Address Correction Service**
  - More savings and improved address quality
- **Mail Anywhere Participation**
  - One permit to mail at any USPS entry site – more savings
- **Promotion and Incentive Programs**
- **Mailpiece and Container Tracking**
  - Visibility and predictability of USPS mail delivery
- **Expedited Mail Acceptance**
  - Saves time and effort at the BEMU

Savings with Full-Service

Savings with Full-Service	
Per Piece Discount – First-Class	$0.003
Per Piece Discount – Other Classes	$0.001
8125 Elimination (Requires eInduction)	$0.06 per printed page + reduced man-hours
ACS Fees Savings	$0.05 per piece (FCM) $0.12 per piece (STD)
Permit Fee Elimination	$225 per permit

Permit Fee Waiver

▶ Fees waived if Full-Service volume for permit stays at 90% threshold

▶ 90% threshold is tracked cumulatively over a year from the due date

Full-Service Cumulative Percentage Calculation:

$$Cumulative\ FS\% = \frac{Number\ of\ FS\ Pieces}{Total\ Number\ of\ Eligible\ Presorted\ Pieces}$$

Address Correction Service (ACS)

▶ Provides mailers with change-of-address (COA) information and other reasons for non-delivery **electronically**

▶ Available for use with all classes of mail

▶ Used in conjunction with Ancillary Service Endorsements, such as:

- Address Service Requested
- Change Service Requested
- Return Service Requested

▶ Supports the Secure Destruction Program

Mail Anywhere Program

▶ Allows the same permit to be used at every mail entry site without having to pay additional fees!
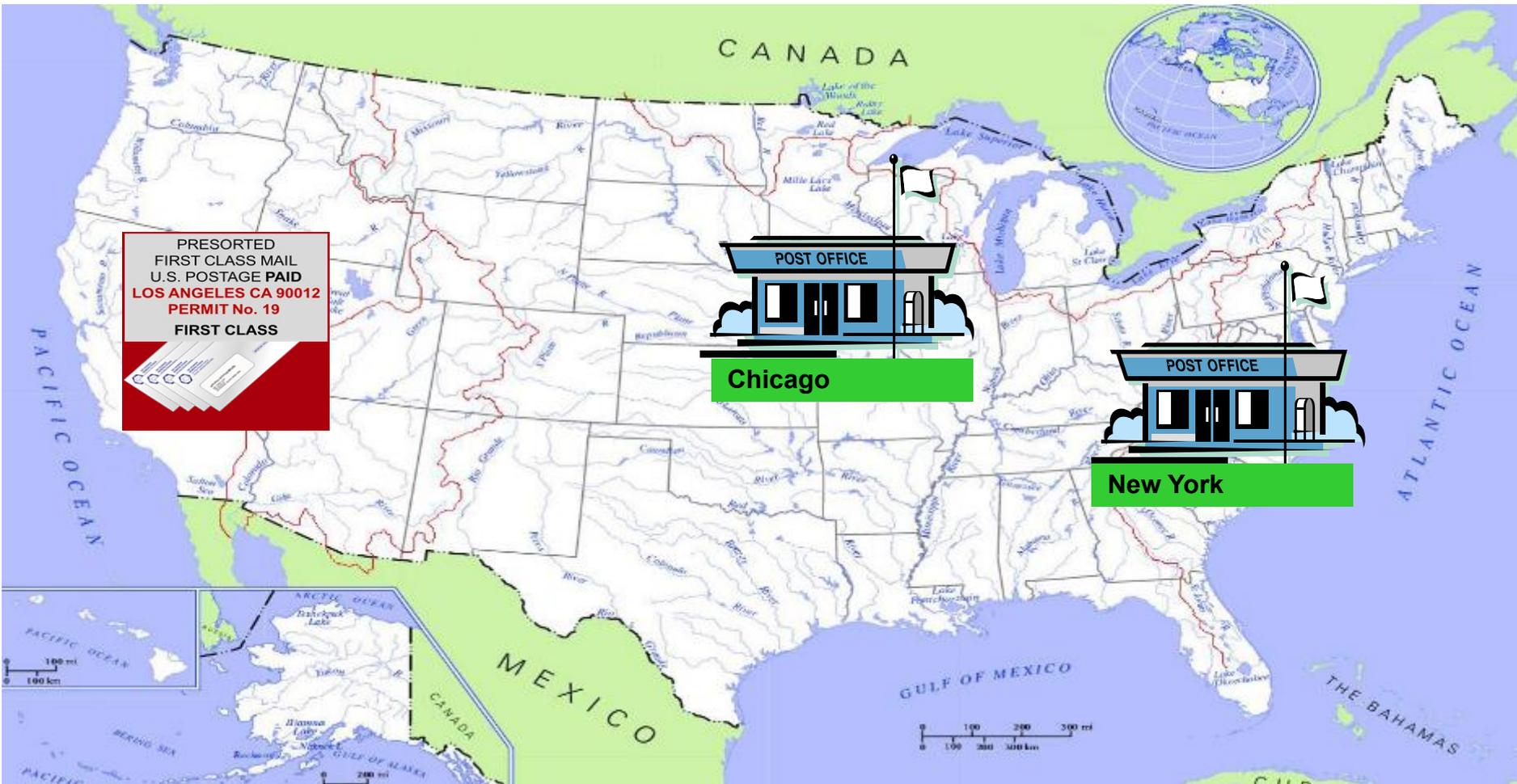
IMb Tracing for Visibility and Predictable Delivery

- Obtain near-real-time notification from mail processing scans

- Identify delivery trends and ensure delivery meets in-home dates

- Know when your message reached your audience so you can synchronize multichannel marketing

- Enable fulfillment, staffing and inventory planning based on mail delivery

IMb Tracing®

IMb Tracing is a <u>FREE</u> service that provides real-time tracking information for your automation-compatible letters and flats.

For more information visit:
https://ribbs.usps.gov/confirm/documents/tech_guides/IMb_TracingFactSheet.pdf

Informed Visibility Report Container/Tray Visibility

► Powerful dashboards to answer the question …

"Where is my mail?"

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Are You Ready to Get Started?

▶ Full-Service Intelligent Mail barcodes are as easy as …

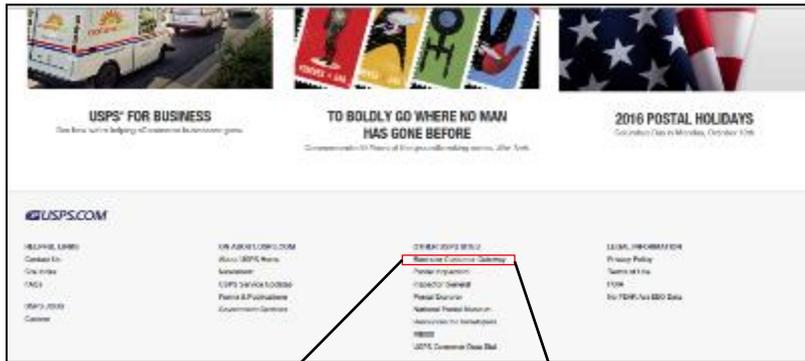**Step 1:** Obtain your MID and CRID using the Business Customer Gateway

Step 2: Generate the IMb for pieces and containers

Step 3: Create Electronic Documentation

Getting to Business Customer Gateway

When you get to the USPS homepage, scroll down to the bottom of the page

Click Here

OTHER USPS SITES

Business Customer Gateway

Postal Inspectors

Inspector General

Postal Explorer

National Postal Museum

Resources for Developers

RIBBS

USPS Customer Data Dial

Logon with your credentials Here

Step 1: Obtain your MID/CRID using the BCG

Step 1: Create Your USPS.com Business Account

*Pick a Username

Usernames need 6 characters.
You *can* use your email address. ⑦

[   ]

[**Check This Name**]

Enter Security Information
* Indicates a required field

*Pick a Password

Passwords need 10 characters, including an uppercase
and lowercase letter, a number, and a special character.
They are case-sensitive and cannot include your
username or more than two repeat characters in a row.
⑦

Password

[   ]

Password Strength
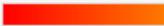
▮▮▮▮▮▮▮▮▮ 0% Too Short

Re-Type Password

[   ]

*Pick Two Security Questions

Please answer two secret questions. If you forget your password, you will be asked for this information to re-gain
access to our site.

*First Security Question

[Select First Question ▾]

Your Answer

Answers are not case-sensitive. ⑦

[   ]

Re-Type Your Answer

[   ]

*Second Security Question

[Select Second Question ▾]

Your Answer

Answers are not case-sensitive. ⑦

[   ]

Re-Type Your Answer

[   ]

PCC

Step 1: Enter Your Name and Contact Information
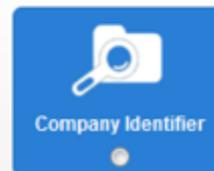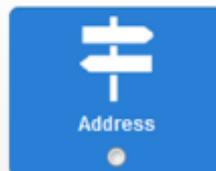
Step 1: Find Your Correct Address

Find by address

Fill out all the required fields and validate your address so it can be verified as a valid delivery address.

Existing Company?

The company information you submitted seems to be similar to one of our existing company records. Please review existing records and if you can find a matching record, please select the best option and then select the Continue Button.

Original Address:

○ USPS

    100 PITCHER ST

    UTICANY13504-8900

Existing Records:

◉ USPS
100 PITCHER ST
UTICA NY 13504-8900

CRID: 183874

○ US Postal Service
100 PITCHER ST
UTICA NY 13504-8900

[Back] [Continue]

Step 1: Click the Create Account

Step 1: Welcome to the BCG

Welcome to the Business Customer Gateway

* Indicates a required field

You've successfully registered your account, and you are almost ready to use the Business Customer Gateway. We've got you signed up as:

Your Business Location:

USPS
100 PITCHER ST
UTICA, NY 13504-8900
UNITED STATES

CRID ⓘ : 183874

You will be given permission to use several **USPS Business Services** allowing you to do things like:

- Prepare, track and monitor your 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 On Top of USPS Promotions and Incentive Programs

Terms and Conditions *

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.

By clicking **Continue** you agree to the terms and conditions of the Business Customer Gateway and consent to any future updates.

[Continue]

Step 1: USPS Assigns Your Mailer ID (MID)

Step 1: Link Your Permits

Go to "**Manage Permits**" under "**Mailing Services**."	
Customers will select their Business Name by clicking the link in the '**Name**' column. You will go to the page shown below.	
Scroll to the bottom and select the "**Permit Validation**" tab.	

Step 1: Link Your Permits, Cont.

Enter the Permit Number, Permit Type, Post Office of Mailing ZIP code (5 digit) and enter the amount of one of the last 10 transactions on this account.

Example: For a fee payment of $200.00, enter 200.00 or the exact amount they paid.

Customers will enter their permit information and click '**Validate**'. Once linked, the permit information will be available to them within the IMsb application.

If the permit does not link- call the help desk(800) 522-9085 option 3.
or your local IMsb Ambassador. Ask them to LINK THE PERMIT.

This is a one time process and ONLY the Business Service Administrator of the account can link the permit.

Step 2: Generate the Intelligent Mail barcode

▶ Are you using USPS CASS and PAVE certified software?

YES	NO
You are done with Step 1	Consider a Cloud-Based Tool

▶ A list of certified software vendors is posted on http://ribbs.usps.gov

▶ USPS has an Intelligent Mail small business (IMsb Tool) available through the Business Customer Gateway

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▶ **What is Full-Service**

▶ **Benefits of Full-Service**

▶ **Getting Started**

➡ **Intelligent Mail Barcode**

▶ **Postage Statement Submission**

Intelligent Mail® Piece Barcode Data Construct

▶ Mailers are required to place unique Intelligent Mail Barcodes on all mailpieces, trays/sacks, containers/pallets

▶ Barcodes cannot be reused for at least 45 days

| Components of an IMb required for all Full-Service mailpieces				
Barcode ID *Ex: "00" for Mixed AADC*	**Service Type** *Ex: "314" for First Class Mail*	**Mailer ID** *Ex: "123456" USPS assigned*	**Serial Number** *Ex: "200890001" Mailer assigned*	**Routing Code** *Ex: 6449 Amberview Ct., Memphis, TN 38141834649*

✓ Barcode ID with Optional Endorsement Line
✓ Service Type
✓ Mailer ID
✓ Serial Number
✓ Delivery Point ZIP™ Code (Routing Code)

ABC BUSINESS
MEMBERS DIVISION
123 West Pleasant Avenue
Anytown, Nebraska 00000-0000

MR. FIRST LAST
789 MAIN ST
ANYWHERE, MAINE 00000-0000

IMPORTANT DOCUMENT INSIDE

Intelligent Mail® Tray (IMtb) Barcode Requirements

▶ Components of an Intelligent Mail Tray Barcode (IMtb) are required for all Full-Service trays/tubs/sacks
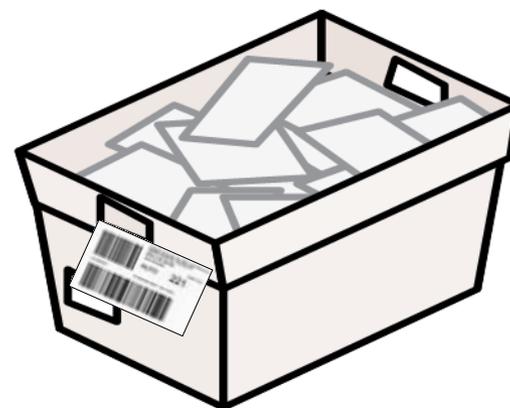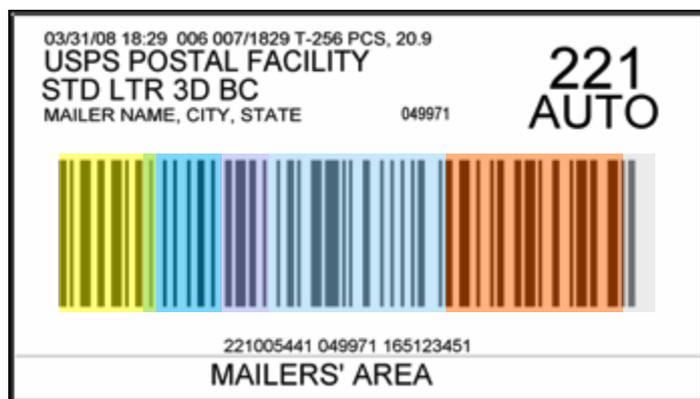
ZIP™ Code	Content Identification Number (CIN)	Processing Code	Mailer ID	Serial Number	Label Type
Ex: Memphis, TN "38141"	3-digits describing the tray	Ex: "1" for Automation Compatible	Ex: "123456" USPS Assigned	Ex: "200890001" Mailer Assigned	Ex: "1" for 6-digit MID

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➡ **Postage Statement Submission**

What is Electronic Documentation?

► Electronic versions of postal reports

- Postage Statements
- Qualification Reports
- Other documentation

► Information uploaded to *PostalOne!*®

► Replaces printed documentation

Three Paths to Submit eDoc

▶ An eDoc is required for all Full-Service Mailings

▶ Three ways that mailers can submit electronic documentation:

Mail.dat	Mail.XML	Postal Wizard
• Mailer uses own software or vendor software to create electronic file • Mail.dat is an electronic file that represents the mailing and contains the Postage Statement and qualification information • Mail.dat uses a fixed file format to send mailing information	• Mailer uses own software or vendor software to create electronic file • Mail.XML is an electronic message that represents the mailing and contains the Postage Statement and qualification information • Allows two-way conversational communication letting the customer select and correct data fields submitted	• Mailer types information into online forms in Postal Wizard, a USPS tool • Postal Wizard creates the electronic postage statement • Separate software is needed to generate barcodes • Link: http://gateway.usps.com

eDoc Certified Vendors List

Certified Vendors List

Benefits of Mail.dat

Benefits	Limitations
• Automatic upload available • Contains all postal paperwork • Established standard • Available with many software packages • Flexibility after presort • No size or complexity limitations	• Managing files can be confusing • Additional software may be required

Benefits of Mail.XML

Benefits	Limitations
• Contains all postal paperwork • Automated processing available • No files to keep track of • Additional services (FAST®, data retrieval) available • No size or complexity limitations	• Additional software may be required • Not available from all vendors

Benefits of the Postal Wizard

Benefits	Limitations
• Easy to use • No additional software • No additional files • Available for simple mailings	• Requires manual entry • No entry automation available • 10k limit for Full-Service mailings • Replicates postage statement only • Non-automation pieces must be on separate statement

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▶ **Electronic Document**

➡ **Postal Wizard**

Business Customer Gateway – Postal Wizard

Using the Postal Wizard

Using the Postal Wizard

Using the Postal Wizard

Which eDoc Method is Right for You?

	Postal Wizard	Mail.dat	Mail.XML
Eligible for Full-Service discounts	✓	✓	✓
Replaces postage statement	✓	✓	✓
Replaces all postal paperwork		✓	✓
Good for simple mailings	✓	✓	✓
Good for all mailings		✓	✓
Internet-based transmission	✓		✓
File-based transmission		✓	
Automated submission available		✓	✓
Software required		✓	✓

Final Step Through Questions

▶ **If you are using USPS certified software now**

- Check with your software provider to turn on Full-Service IMb

  - A list of certified software vendors is posted on https://beta.postalpro.usps.gov/

- Ask about the supported eDoc methods

▶ **If you currently hand-sort your mail and manually produce USPS postage statements**

- Consider a low-cost desktop solution or an online cloud-based solution

  - Search the Internet for "Direct Mail Software" or "Cloud-based Presort"

- Visit the USPS Business Customer Gateway for the

  - Postal Wizard

  - IMsb Tool

Full-Service Intelligent Mail Fact Sheet

▶ **For more information, visit https://beta.postalpro.usps.gov**

- https://ribbs.usps.gov/intelligentmail/documents/tech_guides/FullServiceIntelligentMailFactSheet.pdf

UNITED STATES POSTAL SERVICE

Full-Service Intelligent Mail® Fact Sheet

Now's the time to upgrade to Full-Service to achieve the best pricing on your:

- **First-Class Mail®** postcards, letters and flats
- **Standard Mail®** letters and flats
- **Periodicals** letters and flats
- **Bound Printed Matter** flats

BENEFITS

✓ **Reduce Costs**
Receive additional per piece discount on automation mailings
Eliminate permit fees
Use the same permit at any location

✓ **Accurate Delivery**
Address Correction on Full-Service pieces

✓ **Monitor Service**
Start-the-Clock on Mail Entry
Visibility and tracking

KEY REQUIREMENTS

- Apply unique Intelligent Mail barcode (IMb) to each postcard, letter, and flat
- Apply unique Intelligent Mail tray barcode (IMtb) to trays and sacks
- Apply unique Intelligent Mail container barcode (IMcb) to placards for containers (i.e. pallets) when required
  - Small volume mailings entered at a BMEU typically do not need an IMcb. Reference https://ribbs.usps.gov/intelligentmail/documents/tech_g uides/FullServiceContainerPlacarding.pdf for more info.
- Submit postage statements and mailing documentation electronically

Barcode Uniqueness
For mailings less than 10,000 pieces, mailers have two options:
Option A: Provide an Identical Barcode Serial Number within a single mailing that must maintain uniqueness across mailings for 45 days
Option B: Provide a range of unique Barcode Serial Numbers throughout a single mailing that must maintain uniqueness across mailings for 45 days.

Questions?