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Program Registration

External Online Enrollment

User Guide

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Change History

This section will track the changes.

Version	Change made by	Description
0.3	Program Reg team	Initial version associated with Release 1.0.0
0.4	Mainak Bardhan	Updates for Release 1.1.0.
0.5	Melinda Henke	Added new section for Program Assistance, updated Program Summary section
0.6	Emily Hussey	Updates for Release 1.2.0 and 2.0.0 for Shipping Services
0.7	Emily Hussey	Updates for Release 2.1.0 for Shipping Services and removed Incentive Program information
2.0	Tracey Epstein	Updates since 12/2012, including Preproduction environment information
3.0	Tanya Perry	Updates to include the new BCG Registration Page
3.1	Jovino Ribeiro	Added list of similar locations; inactive cert status
3.2	Tanya Perry	Customer review
3.3	Tracey Epstein	Minor updates per customer review
3.4	Tanya Perry	Customer review
3.5	Jovino Ribeiro	Added returns task account information
3.6	Florida Nulman	Added new API enrollment module; "Merchandise Return" permits changed to "Returns Services" permits; Users can download Client Application from the enrollment screen. Adult Signature and Adult Signature Restricted Delivery is replaced with "USPS Signature" service in My Profile.
3.7	Tanya Perry	Minor description updates.
3.8	Florida Nulman	Updates for Release 15, January 2016 SBP Enrollment updates.

1. Introduction

1.1. Purpose of Technical Specifications

The Program Registration system, a web based portal that provides the capability for customers to register for services, includes an external application for the customers and an internal application for Help Desk users. The purpose of this document is to outline Program Registration's external application. The external portion of Program Registration provides an avenue for mailers and Mail Service Providers (MSPs) to register and manage Shipping Services and Incentive Programs, while the internal portion of Program Registration serves as the user interface for the Help Desk. The Help Desk interacts with mailers during registration by approving certain tasks throughout the enrollment process. Program Registration interfaces with different systems to send and receive permit and customer information during and after enrollment.

1.2. Intended Audience

This document is intended for new users of the Online Enrollment Program Registration application. New users can use this document as a guide to understand the requirements for each external page and how the pages interact throughout the enrollment process.

1.3. Application Overview/Descriptions

1.3.1. Shipping Services

Program Registration supports the following Shipping Service programs: Electronic Verification System, Parcel Return Service, Priority Mail Express Manifesting, Tracking Only, Scan Based Payment, Bulk Proof of Delivery, Shipping Partner, PC Postage, Transition to Intelligent Mail package barcode, and Click-N-Ship Business Pro. These programs provide the customer ways to streamline shipping processes, use electronic files for postage processing and payment, and/or track mailings.

Electronic Verification System (eVS®)

eVS allows parcel mailers to document and pay postage by transmitting electronic manifest files to the eVS database, which is part of the PostalOne!® system. eVS allows parcel mailers to streamline their shipping processes, while allowing integration with other systems and business processes for data collection and performance measurement.

Parcel Return Service (PRS)

PRS provides businesses a convenient, economical solution for returning merchandise. The service offers discount pricing when the returns are picked up in bulk at a returns delivery unit or at a return sectional center facility. Authorized agents also can pick up PRS packages from designated postal facilities, helping reduce processing and transportation expenses.

Priority Mail Express Manifesting (PMEM)

PMEM allows mailers to send the Postal Service an electronic file documenting postage and special service fees for all pieces in an Priority Mail Express mailing. PMEM may be used to pay postage for Priority Mail Express, Priority Mail Express International; Priority Mail Express Military Service to qualifying APO/FPO and DPO addresses; and, Priority Mail Express Custom Designed service. Postage for other classes of mail cannot be paid through PMEM.

Tracking Only

The Tracking Only Service is a program that provides tracking information through Confirmation Services for mailers who are not certified customers of Electronic Verification System (eVS), Parcel Return Service (PRS), or Electronic Mail Manifesting (PMEM) programs.

Scanned Based Payment (SBP)

The Scan Based Payment System provides an alternative payment model based on the collection of scans that trigger payment. Scan data is sent to PostalOne! based on the combination of Mailer ID (MID) and Customer Registration ID (CRID).

Bulk Proof of Delivery (BPOD)

The Bulk Proof of Delivery service provides mailers the opportunity to receive proof of delivery (delivery record) information in bulk. Participation is limited to mailers who use a MID in their labels or in an electronic file.

Shipping Partner (SP)

The Postal Service has additional Event Codes that allow shipping partners and other mailers to provide their customers with the shipment status of their packages prior to the Postal Service's receipt of the packages or Confirmation Services Shipping Services file. This added visibility lends assurance that a mail piece is on its way. Shipping partners create a file of event data captured at their facilities and transmit the file to the Postal Service. This event information will then be available to customers on the Track & Confirm Web site, through the USPS mobile application, or through the Track/Confirm API.

PC Postage (PC)

The PC Postage option is an express method for obtaining a MID for Commercial Plus Pricing (CPP) discounts or to obtain event tracking information through a File Transfer Protocol (FTP) account. FTP accounts also require the submission of Postal Form 1357-S.

Transition to Intelligent Mail package barcode (IMpb)

The Transition to IMpb program allows mailers currently using the legacy file format (1.3 or 1.4) to transition their existing MIDs to the new file format of 1.6 in order to be eligible for IMpb. Intelligent Mail package barcodes provide piece-level data to enable the Postal Service to increase efficiency, add value to its package product line, and enhance its package tracking capabilities. Certification is required for the transitioned MIDs - see Publication 199: Intelligent Mail Package Barcode (IMpb) Implementation Guide for: Confirmation Services and Electronic Verification System (eVS) Mailers for certification details.

Click-N-Ship Business Pro™

CNS BPro allows customers to print shipping labels and securely pay for packages. This free software is designed for business customers who ship 50 or more packages (or multiple packages with a combined weight of 50 or more pounds) in a typical mailing.

1.3.2. Manage APIs

A new module is added to allow external customers to sign up for and manage USPS APIs.

Only Customer Package Intercept (CPI) API is currently available.

1.3.3. Shipping Service Tasks

During the enrollment process, there are tasks users will need to take action on. These tasks and their requirements are listed below:

1. Additional Contact Information – Technical Contact fields are required.
2. Business Owner Approval – Required for users enrolling in Scan Based Payment.
3. BPOD Agreement – Required for users enrolling in BPOD.
4. Certification Questionnaire – Required except when user answers “Yes” to “Will you be using Click-N-Ship Business, an Online Postage Vendor, or Postage Meter?” on the Mailing Type tab of the My Profile Survey.
5. Manage Shipping Locations – Always required.
 - a. File Certification – Required when the user answers “Yes” to “Will you be sending an electronic file to USPS?” of the Certification Questionnaire, unless user selects “Yes” to “Will you be using USPS Shipping Assistant®?” on the My Profile Survey - no Certification tasks are required in this case.

- b. Label Certification – Required when the user answers “Yes” to “Will you be sending an electronic file to USPS?” of the Certification Questionnaire or when the user answers “No” to “Will you be sending an electronic file to USPS?” and “Printing your own labels” to “How will you be generating your bar-coded labels for packages?”. If user selects “Yes” to “Will you be using USPS Shipping Assistant®?” on the My Profile Survey, no Certification tasks are required.
6. Certification Test Kit – Required if Label or File Certification is required. Task will only appear if an electronic version of applicable test kit(s) is available within Program Registration.
7. Manage Shipping Partners – Required for users enrolling in Shipping Partner.
8. Manage Payment Accounts – Required except when user is enrolling in Tracking Only or Shipping Partner.
9. Credit Card Authorization – Required when the user is enrolling in BPOD and has chosen “Pay as Compiled” in the BPOD Agreement.
10. Manage Clients – Required for all users who select “Mail Service Provider” in the Business Customer Gateway.
11. Transition Locations - Required for all users enrolling in Transition to IMpb.
12. Update Profile - Required for all users enrolling in Transition to IMpb.
13. Help Desk Approval – Always required.
14. PMEM Contact Information – Required for user enrolling in Priority Mail Express Manifesting (PMEM)

1.3.4. Environments for Mailers and Shippers

Program Registration supports two environments for external users – Production and Pre-Production (Pre-Prod).

Production

The Production environment is the live environment used for enrollment in one of the aforementioned Shipping Services in order to ultimately ship packages under that service.

Pre-Production

The Pre-Production (“Pre-Prod”) environment is a mirror/replica of the upcoming Production version of the Program Registration system.

During online enrollment for Shipping programs and services, Program Registration interfaces with different systems to send and receive permit and customer information

during and after enrollment. These interfaces may behave differently in the Pre-Prod environment. See the following table for more details.

Pre-Prod Interfaces	
MID Tool	<p>Production: MID Tool generates MID data. Program Registration pulls this data.</p> <p>Pre-Prod: Pre-Prod pulls MID information generated from the MID Tool in Production. New MIDs cannot be requested in Pre-Prod.</p>
Customer Registration	<p>Production: CRID data is generated in Production. Program Registration pulls this data.</p> <p>Pre-Prod: Pre-Prod pulls existing CRID data from the Customer Registration Production environment. New CRIDs are not generated in Pre-Prod.</p>
PostalOne!	<p>Production: Program Registration retrieves payment information from PostalOne!, as well as sends customer data to different modules such as eVS and SBP.</p> <p>Pre-Prod: In Pre-Prod, PostalOne! (including eVS and SBP) have their own Pre-Prod environment. This means in Pre-Prod, the following activities still occur:</p> <ul style="list-style-type: none"> • PostalOne – Permits are still created • eVS – Data is still sent to eVS from Program Registration • SBP – Data is still sent to SBP from Program Registration
PTR	<p>Production: Any time a customer enrolls or updates their profile in Program Reg, a message is sent to PTR with all the relevant customer information. Program Registration – Shipping is the system of record for all PTR customer information.</p> <p>Pre-Prod: In the Pre-Prod environment, data will not be sent to PTR.</p>
PASS	<p>Production: Program Registration sends the PASS system all customers who have enrolled in eVS and SBP. PASS uses this information to determine which MIDs they need to sample.</p> <p>Pre-Prod: In Pre-Prod, this information will not be sent.</p>
WebTools	<p>Production: Data is sent to WebTools to support the Click-N-Ship Business Pro™ program.</p> <p>Pre-Prod: Data will not be sent to WebTools from Pre-Prod.</p>
ACH	<p>Production: This system generates a CAPS account for customers.</p> <p>Pre-Prod: ACH does not have its own Pre-Prod environment, so CAPS accounts</p>

	cannot be generated electronically in Pre-Prod.
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2. Business Customer Gateway (BCG) Registration

2.1. Introduction to BCG

The BCG provides business mailers and shippers, access to a wide variety of services provided by the USPS. These services include Program Registration (referred to on the BCG as Online Enrollment) and its associated Shipping programs such as eVS, SBP, and Click-N-Ship Business Pro.

2.2. Using the BCG to Access Online Enrollment

2.2.1. New Business Customer Gateway (BCG) Users:

If you are new to the BCG, complete the following steps to enroll for an Online Enrollment Shipping program:

1. Navigate to the BCG: <https://gateway.usps.com/>
2. Click on Register for free

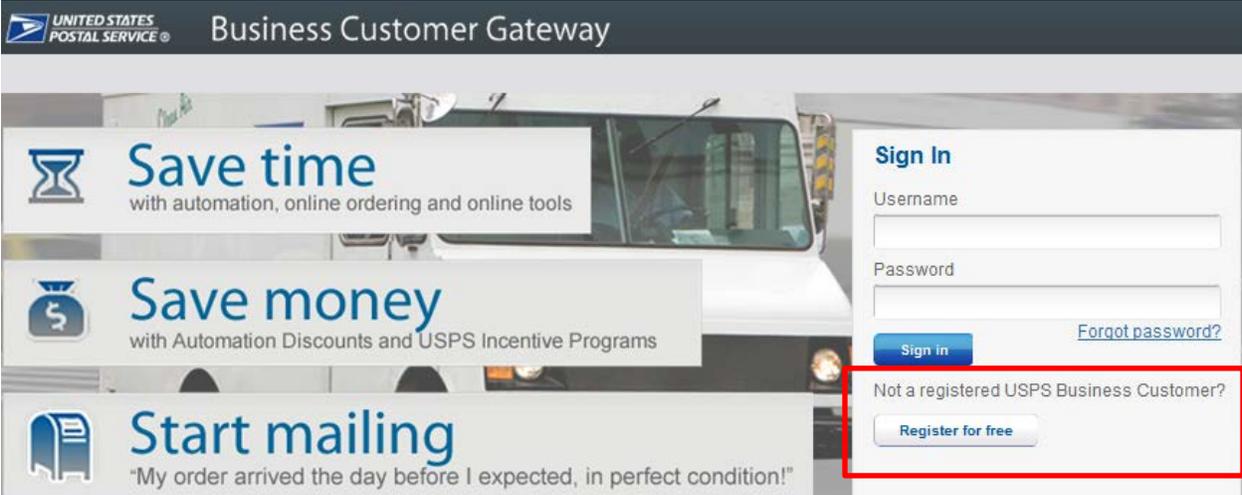


Figure 2.1: Register for Free

3. Create a user name, password and choose two security questions to which you are required to respond.

The screenshot displays a registration form with the following sections:

- *Pick a Username:** A text input field with a blue button labeled "Check This Name".
- Enter Security Information:** A section header with a note: "* Indicates a required field".
- *Pick a Password:** A text input field for the password. Below it is a "Password Strength" indicator showing a red bar and the text "0% Too Short". A "Re-Type Password" text input field is located below the strength indicator.
- *Pick Two Security Questions:** A section with instructions: "Please answer two secret questions. If you forget your password, you will be asked for this information to re-gain access to our site." It contains two columns of dropdown menus for selecting questions, followed by "Your Answer" and "Re-Type Your Answer" text input fields for each.

Figure 2.2: Create User Name and Password

4. For a new business location, enter your name, phone number, email address, and business information by selecting the Address, Zip Code, or CRID radio button. After reviewing the Privacy Policy, click on “Create Account” and a confirmation email will be sent to the email address you provided.

Next, we need your name and contact info
* indicates a required field

Enter Your Name	Enter Your Phone	Enter Your Email Address
Title <input type="text" value="Select"/>	*Type <input type="text" value="US"/> *Phone [?] <input type="text"/> Ext. <input type="text"/>	*Enter Your Email Address [?] <input type="text"/>
*First Name <input type="text"/>	Type <input type="text" value="US"/> Fax <input type="text"/>	*Re-Type Your Email Address <input type="text"/>
M.I. <input type="text"/>		Can we contact you? Get communications from USPS and our partners. <input checked="" type="checkbox"/> FROM USPS <input checked="" type="checkbox"/> FROM USPS PARTNERS
*Last Name <input type="text"/>		
Suffix <input type="text" value="Select"/>		

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

 Address	 ZIP Code™	 Company Identifier
--	---	---

Figure 2.3: Create Account

5. You will be given request that need your attention. Some services that have been requested did not get approved.
6. Clicking “Continue” will take you to a Welcome page.

 **Congratulations, your account is set up with business services.**

Review the status of your service access below. 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. The access is regulated by the Business Service Administrator (BSA) of each service.

 **Your Business Location:**
 INTERCON CHEMICAL CO
 1100 CENTRAL INDUSTRIAL DR
 SAINT LOUIS, MO 63110-2306
 UNITED STATES

CRID [?](#) : 20480630
[ADD A LOCATION](#) [?](#)

 **We have automatically assigned you a Mailer ID (MID): 900029339** [?](#)

 **Is this location a Mail Service Provider (MSP)?** [?](#)
 Yes

 **You can begin using these business services. Services with an asterisk (*) indicate you have become the BSA.**

SERVICE ?
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. ?
Every Door Direct Mail - EDDM is designed to help you reach every home, every address, every time.
Informed Visibility Pilot (For invited participants only) * - Provides mail tracking data for letters, flats, bundles, handling units, and containers. ?
Intelligent Mail Small Business (IMsb) Tool - Produce the IMb for your mailings.
Mailer ID * - Request and manage Mailer IDs. ?

Don't see the business services you need? [GET ACCESS TO ADDITIONAL SERVICES](#)

 **You have requests that need your attention. Some services that have been requested did not get approved.**

SERVICE ?	STATUS ?
Incentive Programs	Pending External BSA ?
Online Enrollment	Pending External BSA ?
Scan Based Payment (SBP)	Pending External BSA ?

[Continue](#)

Figure 2.4: List of Services

7. Clicking “Inbox” will take you to a Pending Requests page.

Welcome

- Inbox**
- Mailing Services
- Shipping Services
- Other Services
- Support
- Manage Account

Need help getting started with Full-Service Intelligent Mail®?

[LEARN MORE](#)

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.

Favorite Services

- DASHBOARD
- MAILER ID
- MAILING REPORTS
- POSTAL WIZARD

[EDIT FAVORITES](#)

Messages

- 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 3 pending service requests. You may review them [here](#).

Get Started with the NEW Business Customer Gateway

[LEARN MORE](#)

LEGAL Privacy Policy > Terms of Use > FOIA > No FEAR Act EEO Data >	ON USPS.COM Government Services > Buy Stamps & Shop > Print a Label with Postage > Customer Service > Site Index >	ON ABOUT.USPS.COM About USPS Home > Newsroom > Mail Service Updates > Forms & Publications > Careers >	OTHER USPS SITES Business Customer Gateway > Postal Inspectors > Inspector General > Postal Explorer >
--	--	--	---

8. Click Review button, check Online Enrollment check box, and Click Approve button

The screenshot shows the Business Customer Gateway interface. A modal dialog box titled "Pending Requests" is open, displaying a request for access to services for a specific location. The request is from "PROGREGSHIPPING NEW SIT" and is pending approval. The location details are: INTERCON CHEMICAL CO, 1100 CENTRAL INDUSTRIAL DR, SAINT LOUIS, MO 63110-2306, CRID: 20480630. The user is prompted to approve or deny the request. The dialog box lists three services: Incentive Programs, Online Enrollment, and Scan Based Payment (SBP), all of which are currently pending. The Online Enrollment checkbox is checked. At the bottom of the dialog box, there are "Deny" and "Approve" buttons. A note at the bottom of the dialog box states: "*Approving a request that is Pending Contingent BSA will allow the user to become BSA for that service for this location." The background shows the Business Customer Gateway navigation menu and a "Pending Requests" tab.

9. Once you have setup your account, you will be able to use your Production user name and password to access the Pre-Production environment for Enrollment.

2.2.2. Existing Business Customer Gateway (BCG) Users:

If you are already using the BCG, complete the following steps to enroll for an Online Enrollment Shipping program:

1. Navigate to the BCG: <https://gateway.usps.com>
2. Enter your user name and password in the fields provided.



Figure 2.5: Sign In screen

3. Once logged in to the BCG, complete the following steps to enroll in an Online Enrollment Shipping program.
 - a) Select Shipping Services from the menu to the left of the Welcome Screen.

Welcome, Lisa

Need help getting started with Full-Service Intelligent Mail®?

[LEARN MORE](#)

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.

Favorite Services

[DASHBOARD](#)

[MAILER ID](#)

[MAILING REPORTS](#)

[ONLINE ENROLLMENT](#)

[POSTAL WIZARD](#)

[EDIT FAVORITES](#)

Messages

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.

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

Get Started with the NEW Business Customer Gateway

[LEARN MORE](#)

- b) Find **Online Enrollment** and **Manage APIs** from the list displayed. You have access to this service if the button to the right says “Go To Service”.

Welcome

Inbox

Mailing Services

Shipping Services

Other Services

Support

Manage Account

Shipping Services

 Shipping services help you deliver packages.

Shipping online services allow customers to enroll and manage the various package product lines the USPS has to offer. The services currently available are listed below. You may access services directly from here that you have been approved for and request access to those you do not.



✚ Balance & Fees (PostalOne!) more info >	GO TO SERVICE
✚ Click-N-Ship Business Pro™ more info >	GET ACCESS
✚ 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 SERVICE
✚ Mailer ID more info >	GO TO SERVICE
✚ Mailing Reports (PostalOne!) more info >	GO TO SERVICE
✚ Manage APIs more info >	GO TO SERVICE
✚ Manage Permits (PostalOne!) more info >	GO TO SERVICE
✚ Online Enrollment more info >	GO TO SERVICE
✚ Parcel Data Exchange (PDX) more info >	GO TO SERVICE
✚ 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 >	GET ACCESS
✚ Scan Based Payment (SBP) more info >	GO TO SERVICE
✚ USPS Package Intercept more info >	GO TO SERVICE

c) If you do not have access to Online Enrollment, click on Get Access.

- If you are the first person to request access to a certain service, you will become the Business Service Administrator (BSA) for that service.

Welcome

Inbox

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✚ Balance & Fees (PostalOne!) more info >	GO TO SERVICE
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✚ Electronic Data Exchange (PostalOne!) more info >	GO TO SERVICE
✚ Electronic Verification Service (eVS) more info >	GO TO SERVICE
✚ Incentive Programs more info >	GO TO SERVICE
✚ Mailer ID more info >	GO TO SERVICE
✚ Mailing Reports (PostalOne!) more info >	GO TO SERVICE
✚ Manage APIs more info >	GO TO SERVICE
✚ Manage Permits (PostalOne!) more info >	GO TO SERVICE
✚ Online Enrollment more info >	GO TO SERVICE
✚ Parcel Data Exchange (PDX) more info >	GO TO SERVICE
✚ 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 >	GET ACCESS
✚ Scan Based Payment (SBP) more info >	GO TO SERVICE
✚ USPS Package Intercept more info >	GO TO SERVICE

- If you are not the BSA, your access to that service must be approved by the BSA for the service at the business location you specified. Until approval is granted, your screen will show a pending status.

2.2.3. Pending Access Statuses:

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

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

- Pending External BSA **Pending External BSA**
 - The service requested (e.g. Online Enrollment) is contingent upon another service (e.g. Manage Mailing Activity and Mailer ID) and therefore requires permission from the contingent service's BSA.
 - MMA Activity includes the following subservices:
 - Dashboard
 - Balance and Fees
 - Electronic Data Exchange
 - Mailing Reports
 - Manage Reports
 - Postal Wizard

2.2.4. Business Service Administrator Role: Granting Access

There must be an Online Enrollment BSA for each location in order to complete enrollment.

- This approval must be provided for each of your company's locations.

It is generally recommended that you become the BSA if no BSA exists for a service and location combination.

- If you opt not to assume the BSA role, you will have to wait until the forthcoming Incentive Programs BSA approves your request.
- If after 25 days the BSA role is not filled, your request will automatically be purged without notification.
- If a user requesting BSA access to Online Enrollment is not BSA for Manage Mailing Activity and Mailer ID, then the BSA for Manage Mailing Activity and Mailer ID must approve requests to become the BSA for the Online Enrollment Service.
 - This approval must be provided for each of your company's locations.

3. The Pre-Production Environment

3.1. Pre-Prod Environment

The Pre-Production ("Pre-Prod") environment is a mirror/replica of the upcoming Production version of the Program Registration system and can be used to test new features. In Pre-

Prod, a user's Customer Registration ID (CRID) and Mailer ID (MID) information will be pulled from production to be used in the Pre-Prod environment. Other enrollment information (My Profile Survey, program enrollment status, Certification Questionnaire responses, permit info, etc.) is not shared between production and Pre-Prod.

3.2. How to Access Pre-Prod

The Pre-Prod environment is accessible through the "Pre-Prod Environment" tab which is located on the Production Enrollment Home page after the "Welcome" tab.

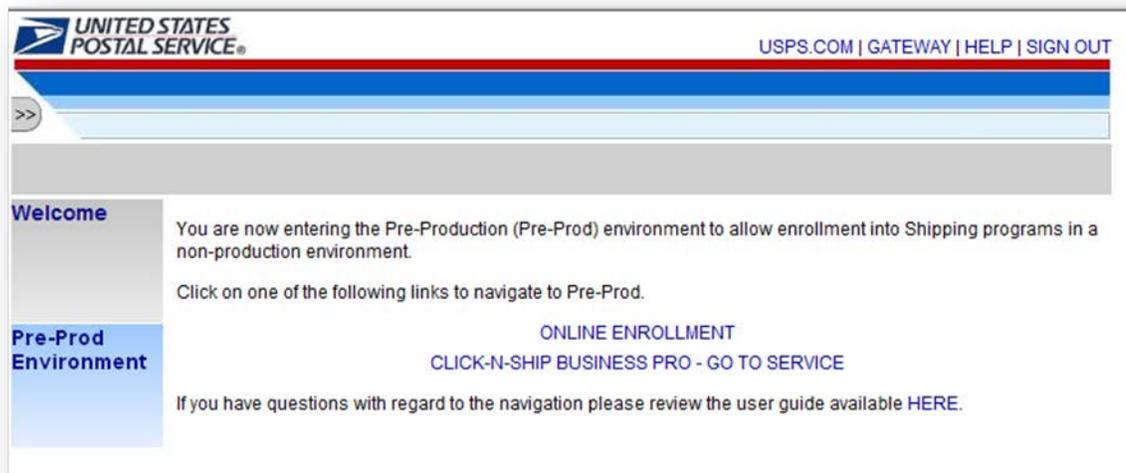


Figure 3.1: Pre-Prod Environment

The Pre-Prod Environment tab contains two links that allows a user to access Pre-Prod. These links simulate how a user accesses the Production system from the BCG. The "Online Enrollment" link will direct the user to the Pre-Prod environment as if they selected the "Online Enrollment" link from the BCG in Production. As in Production, a user logging into Pre-Prod for the first time will land on the Pre-Prod One Click Landing page. A user who has already accessed Pre-Prod and completed their My Profile Survey will land on the Welcome page.

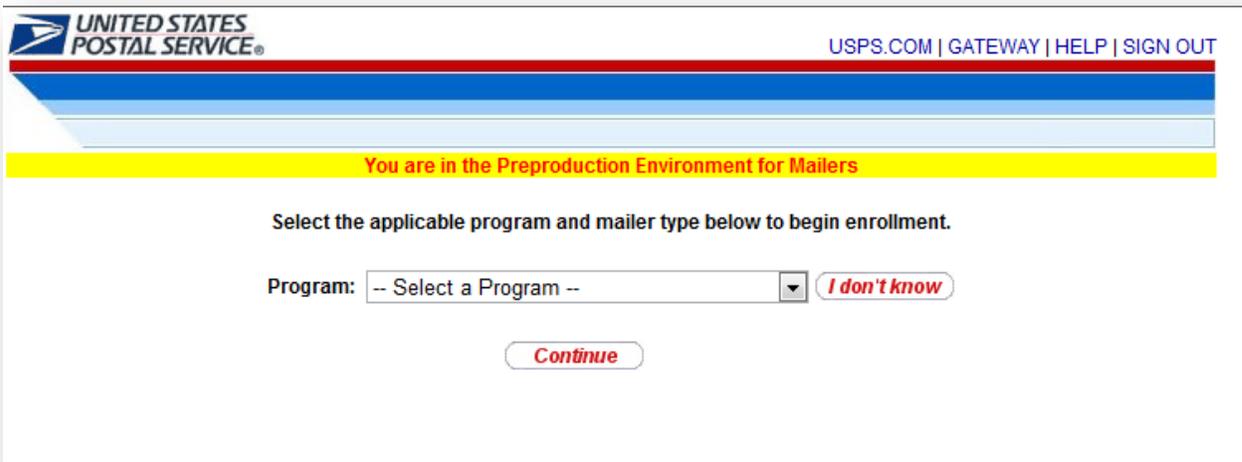


Figure 3.2: Pre-Prod One Click Landing page

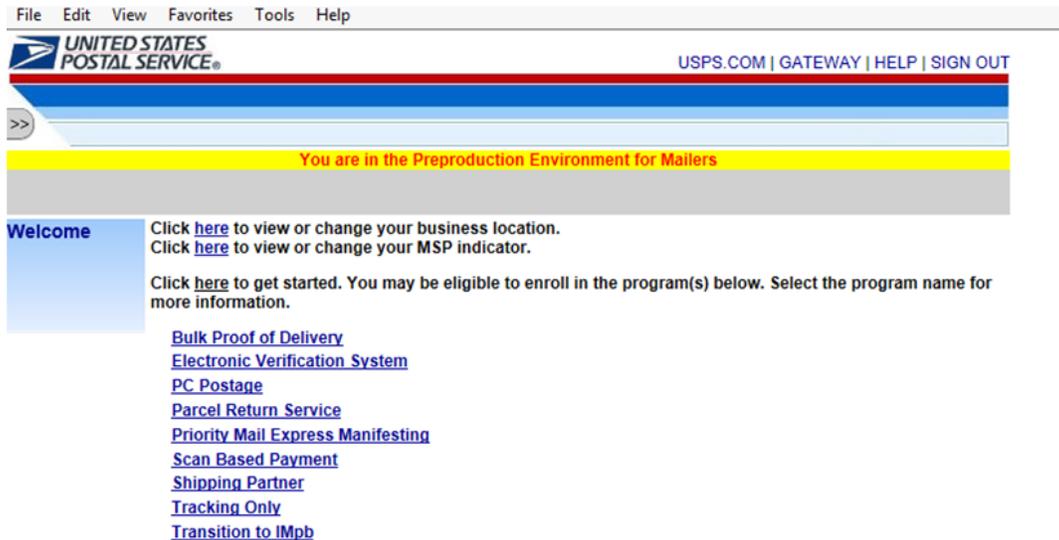


Figure 3.3: Pre-Prod Welcome Page

The second link on the “Pre-Prod Environment” tab is the “Click-N-Ship Business Pro – Go to Service” link. The CNS BPro link simulates a user selecting the corresponding link from the BCG in Production. If a user has not enrolled in any programs in Pre-Prod the one-click enrollment process for CNS BPro will be initiated in Pre-Prod. If a user has enrolled in another Pre-Prod program, the user will be redirected to the Pre-Prod CNS BPro Unable to Enroll screen shown below.

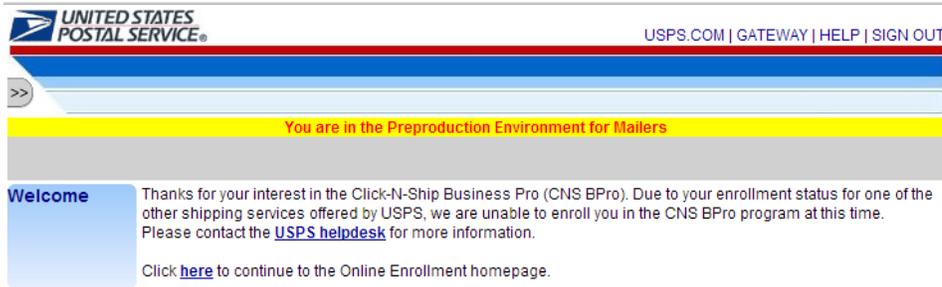


Figure 3.4: Pre-Prod CNS BPro Page

3.3. Pre-Prod System Differences

A yellow banner displays on the top of every Pre-Prod page stating “You are in the Pre-Production Environment for Mailers”. Additionally, there are a number of functional changes throughout the application. Details about any Pre-Prod changes can be found in each of the remaining sections in the “Pre-Prod Differences” sections.

4. Enrollment Home Page

4.1. General Purpose

The Enrollment Home Page displays a list of programs for which the customer is able to enroll. The page initially shows all of the Shipping programs before the My Profile Survey is complete, and filters to only show Available/In Progress/Enrolled programs after the My Profile survey is completed.



Welcome

Click [here](#) to view or change your business location.
Click [here](#) to view or change your MSP indicator.

Click [here](#) to get started. You may be eligible to enroll in the program(s) below. Select the program name for more information.

Pre-Prod Environment

- [Bulk Proof of Delivery](#)
- [Electronic Verification System](#)
- [PC Postage](#)
- [Parcel Return Service](#)
- [Priority Mail Express Manifesting](#)
- [Scan Based Payment](#)
- [Shipping Partner](#)
- [Tracking Only](#)
- [Transition to IMpb](#)

Figure 4.1 – Enrollment Home Page before My Profile Survey Completion

4.2. Business Rules

4.2.1. Availability

The Enrollment Home Page is always displayed upon clicking the “Online Enrollment” link from the BCG. Additionally, the user can click the “Return to Enrollment Home” button on any screen to return to the Home Page.

4.2.2. Required v. Optional Components

N/A

4.3. Page Features

4.3.1. Functionality

- **Change Locations link:** The top line of text on the page displays “Click [here](#) to view or change your business location.” This link will direct the user to the Change Locations page, where they are able to switch between CRIDs.
- **My Profile Survey link:** Before completing the My Profile Survey, a line of text displays on the page: “Click here to get started. You may be eligible to enroll in the program(s) below. Select the program name for more information.” This link will direct the user to the My Profile Survey.
- **Program List:** Upon first entering Online Enrollment, the full list of programs is displayed, with each program name linking the user to a summary of the

program. Once the My Profile Survey is complete, the programs that are available based on survey answers are displayed.

4.3.2. Exceptions/Special Scenarios

Before the user has completed the My Profile Survey, a link to the survey is displayed on the screen. Once the survey is complete, the link is no longer displayed.

4.4. Help Desk Dependencies

N/A

4.5. Post-Enrollment Functionality

Same as pre-enrollment.

4.6. Pre-Prod Differences

The Enrollment Home page functions the same in Pre-Production as it does in Production with two key differences. The link to change your MSP indicator does not exist in Pre-Production. Also, the “Pre-Prod Environment” tab does not display.

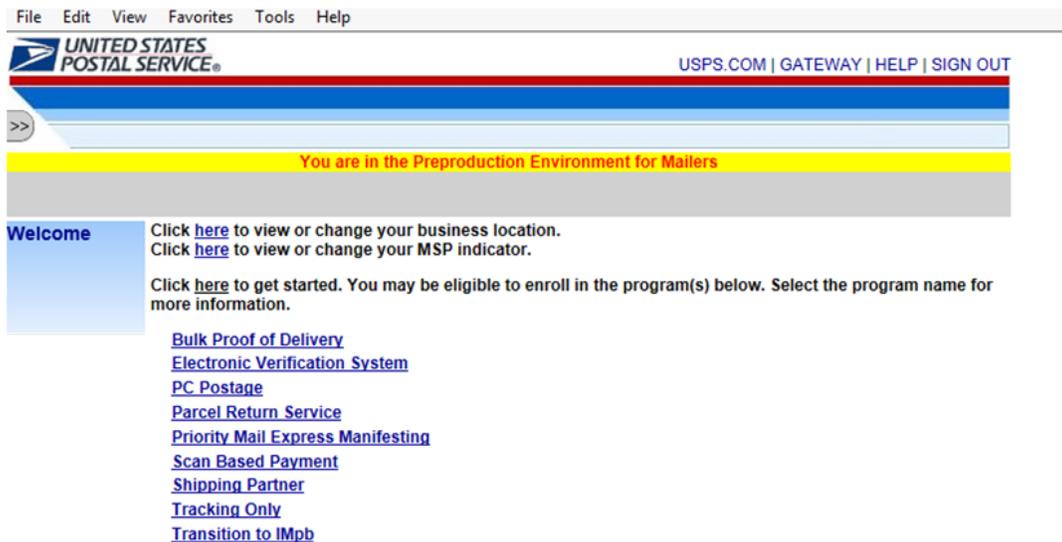


Figure 4.2 – Enrollment Home Page before My Profile Survey Completion - Pre-Prod

5. Change Locations Page

5.1. General Purpose

The Change Locations page allows the user to switch their Master CRID to a different business location. All locations for which the user has added the requisite services in the BCG and is the BSA for will appear in the list. Separate enrollment processes are completed for each location.

	CRID	Company	Address	Enrollment Status
<input checked="" type="radio"/>	700215	Company A	444 4th Street Washington, DC 20024	In Progress
<input type="radio"/>	700225	Company A	444 4th Street Washington, DC 20024	Not Started

Figure 5.1 - Change Location Page

5.2. Business Rules

5.2.1. Availability

The Change Locations page is always available. Additional locations will only display if the user has added these locations in the BCG.

5.2.2. Required v. Optional Components

The Change Location feature is not required.

5.3. Page Features

5.3.1. Functionality

- Location table: The Location table displays all locations for which the user has added in the BCG for Online Enrollment. The table displays the CRID, Company Name, Address, and Enrollment Status. The Enrollment Status displays “In Progress” if the user has started enrollment for that particular location or “Not Started” if they have not accessed enrollment for that location. Each location has a radio button allowing the user to select which location they would like to use.

- Change Location button: Upon selecting the Change Location button, the user's primary location is switched to the selected location.

5.3.2. Exceptions/Special Scenarios

If the user has only one location, the Change Location button will not change the location.

5.4. Help Desk Dependencies

N/A

5.5. Post-Enrollment Functionality

Same as pre-enrollment.

5.6. Pre-Prod Differences

No change in Pre-Prod functionality.

6. Customer Information Panel

6.1. General Purpose

The Customer Information Panel contains high-level information about the user and displays a dynamic list of programs that can be filtered by program enrollment status. The Customer Information Panel is hidden by default when the Landing Page of Online Enrollment is initially accessed. To display it, the user must click the tab located on the upper left corner of the screen, which can be identified by the '>>' symbol.

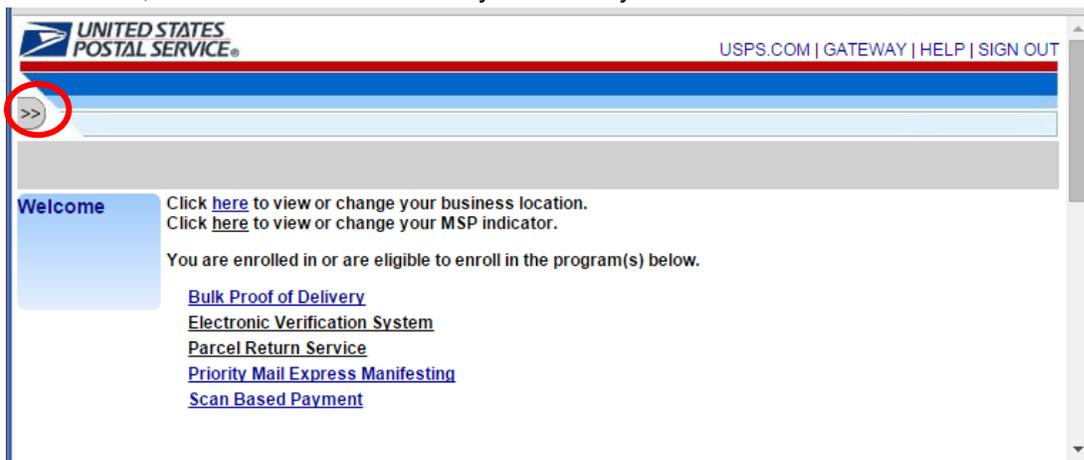


Figure 6.1 - Left Panel: Hidden icon

6.2. Business Rules

6.2.1. Availability

The left panel is always available.

6.2.2. Required v. Optional Components

The Process Start Date will appear after completing the My Profile Survey for Shipping Services and display the date the survey was completed.

6.3. Page Features

6.3.1. Functionality

Getting Started/My Profile link: Before completing the My Profile Survey, the 'Getting Started' link appears in the top right of the panel. Once the My Profile Survey has been completed, the link text changes to 'My Profile'. This link opens the My Profile Survey.

User Information: The user information is displayed at the top of the Customer Information Panel. This information includes the username, full name, company name, full address of the main location associated to the user, the Master CRID for this location, and the Process Start Date.

Filtering Criteria: Four checkboxes (Available Programs, Enrolled Programs, In Progress Programs, and Unavailable Programs) are displayed below the general user information. These checkboxes can be checked or unchecked to define the filtering criteria for the programs list.

Filter button: When selected, this button triggers the actual filtering of the programs based on the selected criteria and refreshed the programs list.

Program list: A list of filtered programs is displayed below the filtering criteria. The Programs list is separated into three columns – Program Name, Type, and Status. The Type column displays either 'S' for Shipping Services or 'I' for Incentive Program. The Status column will display the program status (Unavailable, Available, In Progress, or Enrolled).

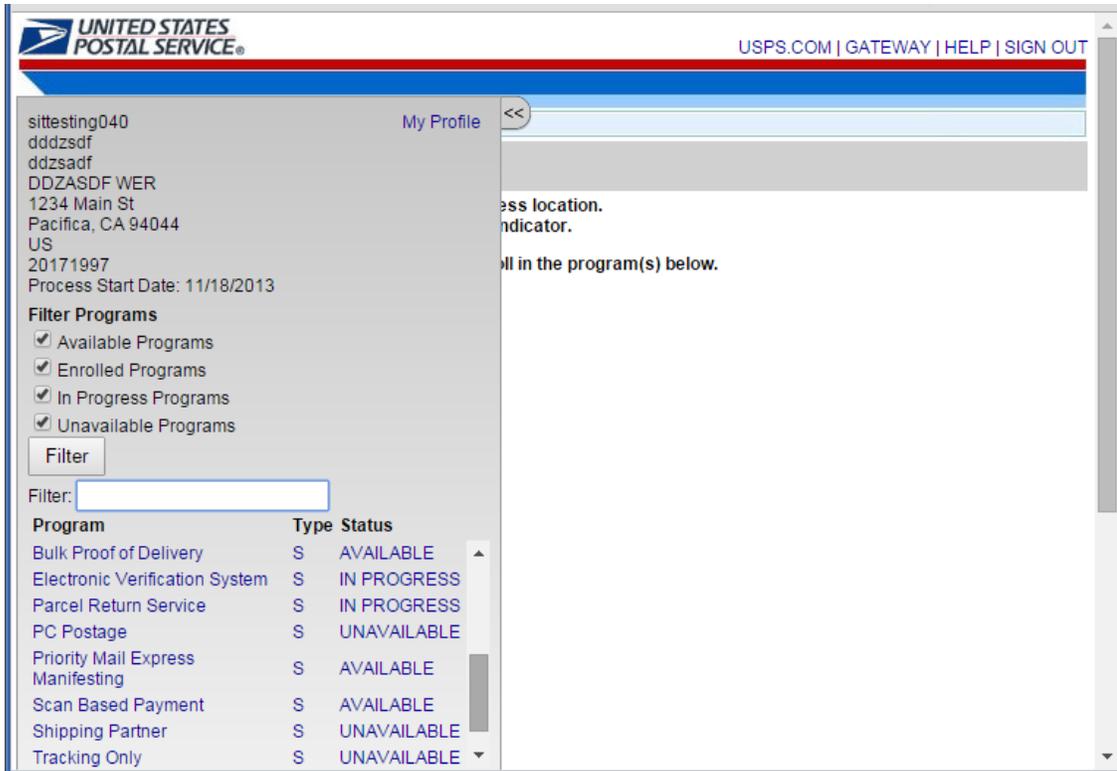


Figure 6.2 - Left Panel: Expanded display

6.3.2. Exceptions/Special Scenarios

- To display all programs, the user must select all checkboxes and select the Filter button.
- Once a program link is selected on the panel, the Customer Information Panel will automatically minimize.
- To minimize the panel without selecting a program, the user must click the '<<' icon.

6.4. Help Desk Dependencies

N/A

6.5. Post-Enrollment Functionality

Same as pre-enrollment.

6.6. Pre-Prod Differences

No change in Pre-Prod functionality.

7. My Profile Survey

7.1. General Purpose

Prior to starting the enrollment process in any Shipping Services program, the user must complete the My Profile Survey to determine program eligibility.

Until the survey is complete, the user will be directed to the first unanswered question of the survey when logging into Program Registration. In order to access the My Profile Survey from the landing page, the user must first access the Customer Information Panel, which can be identified by the '>>' symbol and then click the 'Getting Started' (becomes 'My Profile' after completion) link located in its upper right corner. When opening the survey after completion, the last question will display by default.

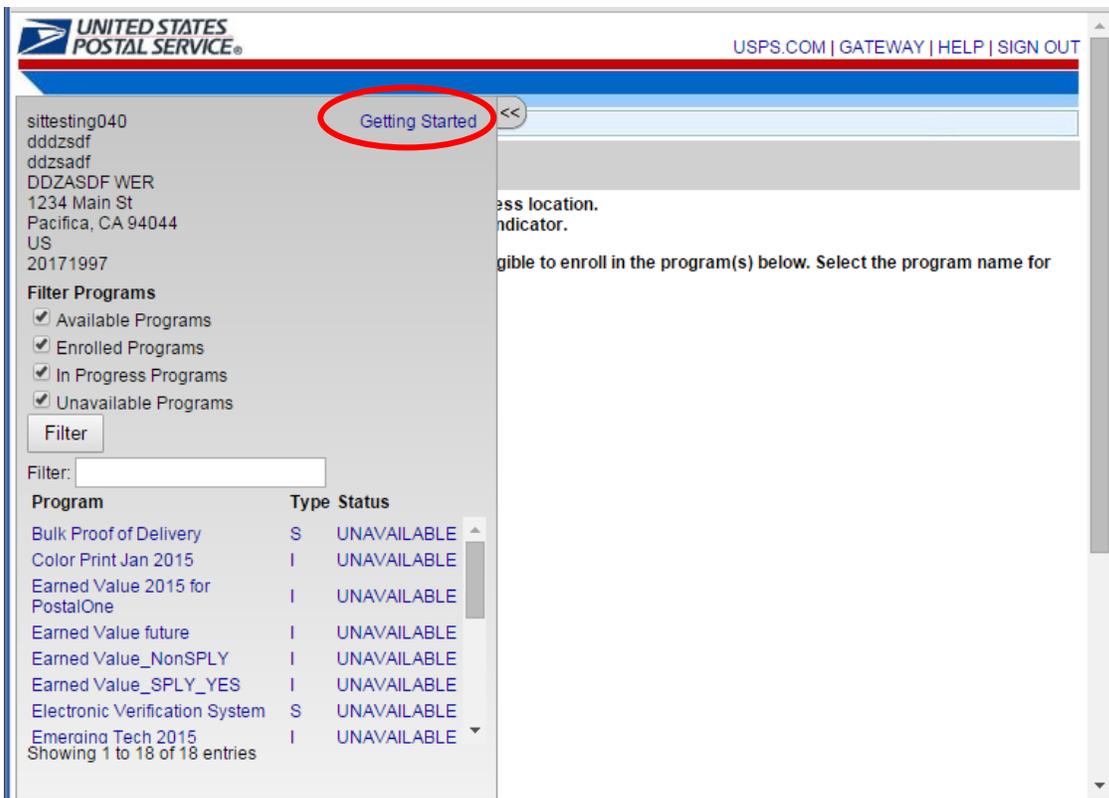


Figure 7.1 - My Profile Survey: Getting Started link

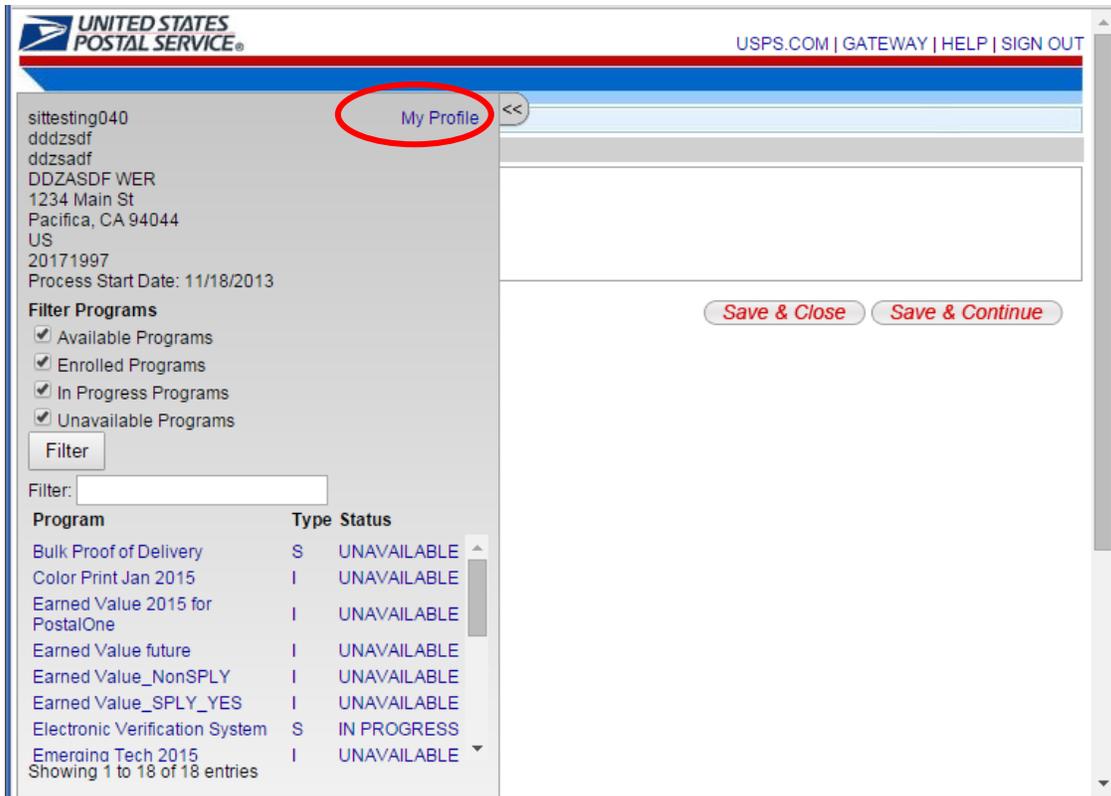


Figure 7.2 - My Profile Survey: Getting Started link becomes “My Profile” when profile is Completed.

7.2. Business Rules

7.2.1. Required v. Optional Components

When the My Profile Survey is initially opened, it only displays the Customer Type tab, and after that is answered and saved, it displays the Mail Category tab. The questions on these tabs apply to all users and are independent of previous answers. The remaining tabs will only display based on the user’s answers to preceding questions.

7.3. Page Features

7.3.1. Functionality

- Save & Continue button: This button saves the selected answer for the current question to the database and navigates the user to the next question.

- Save & Close button: This button saves the selected answer for the current question to the database and navigates the user out of the My Profile Survey to the Program Summary tab.
- Question tabs: The question tabs can be clicked to navigate the user to the selected question.
- Radio buttons: Answer options with radio buttons require the user to select only one option.
- Checkboxes: Answer options with checkboxes allow the user to select multiple options.

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>>

My Profile Survey

Customer Type
(Complete)

Mail Category
(Complete)

Mailing Type
(Complete)

Services
(Complete)

Payment Type
(Complete)

Program Participation
(Complete)

1. Which Domestic Mail classes are you shipping? (Select one or more options)

- First-Class Mail
- Priority Mail
- Critical Mail
- Priority Mail Express
- Standard Mail
- Parcel Select
- Standard Post
- Library Mail
- Media Mail
- Bound Printed Matter

2. Do you want to use Priority Mail Open & Distribute (PMOD)?

- Yes
- No

3. Which USPS Returns mail classes are you shipping? (Select one or more options)

- Parcel Return Service (PRS)
- Priority Mail Return Service
- First-Class Package Return Service
- Ground Return Service

[Save & Close](#) [Save & Continue](#)

Figure 7.3 - My Profile Survey: Display

7.3.2. Exceptions/Special Scenarios

- The survey can be completed in pieces but will continue to have a status of “Incomplete” until all required questions are answered.

- The Getting Started/My Profile link will navigate the user to first unanswered question, if any are left unanswered. If all questions are answered, the link will navigate the user to the last question of the survey.

7.4. Help Desk Dependencies

The Help Desk can view but cannot edit a user's My Profile Survey.

7.5. Post-Enrollment Functionality

Once enrolled in a program, the user can edit survey responses whenever the change does not affect the availability of the user's currently enrolled program(s), with the exception of the Tracking Only program. If a user is already enrolled in the Tracking Only program, changes to the My Profile Survey are unrestricted and there is the possibility of enrolling in other shipping programs. The Tracking Only enrollment status remains "Enrolled".

7.6. Preprod Differences

No change in functionality for Pre-Prod.

8. Program Summary

8.1. General Purpose

Prior to selecting the Begin Enrollment button for a selected program and beginning the enrollment process, the Program Summary page provides users with a description of the program. Once the Begin Enrollment button has been clicked, and enrollment is in progress, the Program Summary page becomes the hub of the enrollment process, providing links to other important pages and displaying the current status of each enrollment task.

8.2. Business Rules

8.2.1. Availability

The Program Summary page is always available.

8.2.2. Required v. Optional Components

All Shipping Programs are unavailable before completion of the My Profile Survey and, as a result, the Program Summary will not display a 'Begin Enrollment' button for any of them.

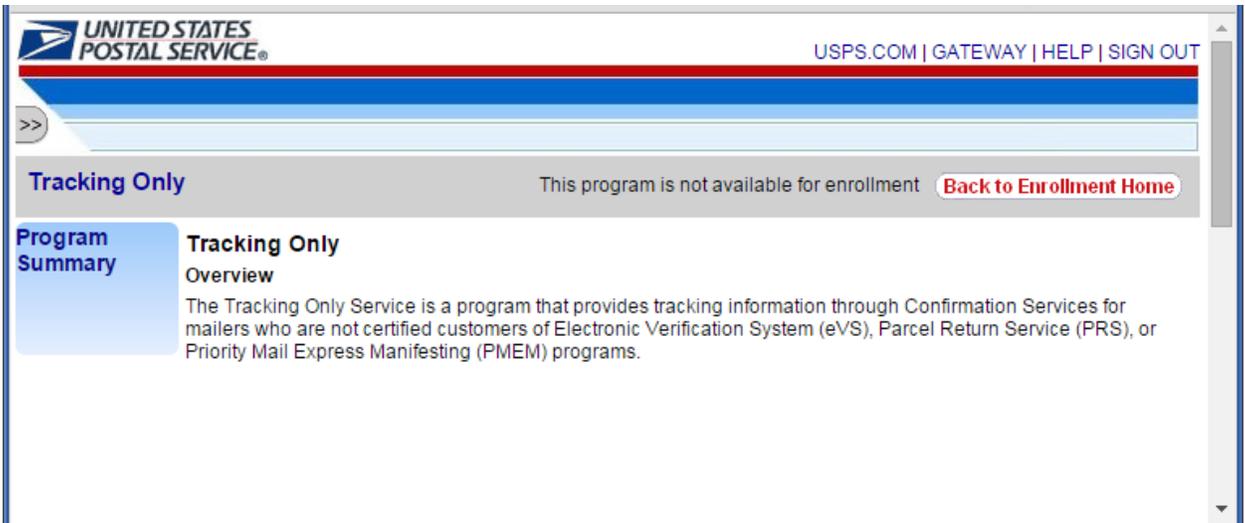


Figure 8.1 - Program Summary: Begin Enrollment button not displayed for unavailable programs

After completing the 'My Profile Survey', one or more Shipping Programs become available and the 'Begin Enrollment' button will appear.

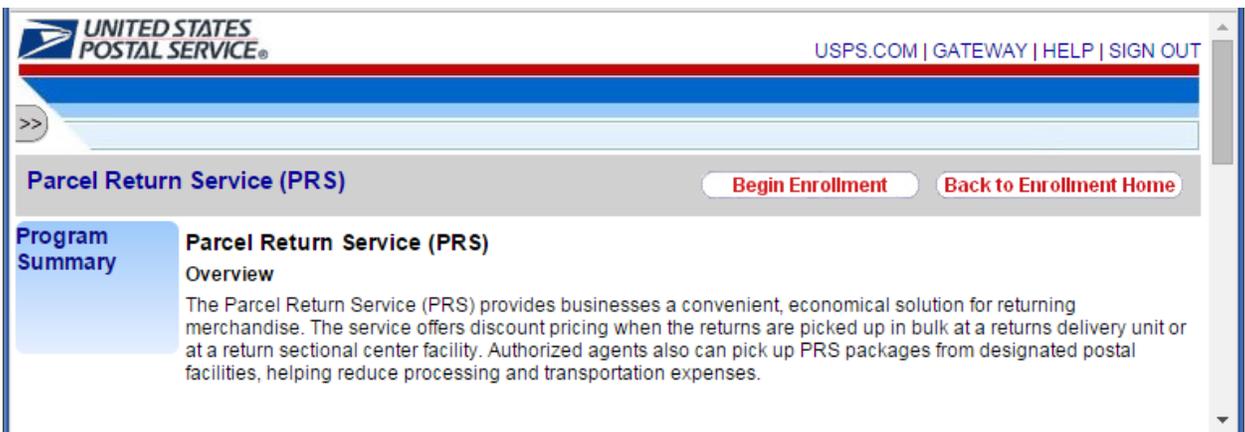


Figure 8.2 - Program Summary: Begin Enrollment button not displayed for unavailable programs

After the user has begun the enrollment process by clicking the 'Begin Enrollment' button, the Program Summary page displays the required enrollments tasks and their statuses.

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>>

Parcel Return Service (PRS) [Back to Enrollment Home](#)

Program Summary

Parcel Return Service (PRS)
Overview
 The Parcel Return Service (PRS) provides businesses a convenient, economical solution for returning merchandise. The service offers discount pricing when the returns are picked up in bulk at a returns delivery unit or at a return sectional center facility. Authorized agents also can pick up PRS packages from designated postal facilities, helping reduce processing and transportation expenses.

Additional Contact Information
 Complete

Certification Questionnaire
 Incomplete

Enrollment Status - In Progress - 1 out of 5 steps completed
 Please complete all of the steps below to enroll.

Enrollment Steps (5)

[+] Additional Contact Information	- Complete
[+] Certification Questionnaire	- Incomplete
[+] Manage Shipping Locations	- Not Available
[+] Manage Payment Accounts	- Not Available
[+] Help Desk Approval	- Not Available

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 Inspector General ›
 Postal Explorer ›

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Figure 8.3 - Program Summary: enrollment tasks and status are displayed.

8.3. Page Features

8.3.1. Functionality

- Customer Task List: The statuses of the following tasks are links that will navigate the user to pages with matching tab names. The customer is required to complete these tasks (all other tasks are completed by USPS and, therefore, do not have a corresponding page that requires customer input).
 - Additional Contact Information
 - Certification Questionnaire (if applicable)
 - Manage Shipping Locations *
 - BPOD Agreement (if applicable)
 - Certification Test Kit (if applicable) *
 - Manage Payment Accounts (if applicable)
 - Manage Clients (if applicable) *

** User can access and view task, but only Helpdesk can complete it*

- **Begin Enrollment:** The Begin Enrollment button appears until a user has selected it and begun enrollment. Clicking the Begin Enrollment button begins the enrollment process. To successfully enroll in a program, a user must complete all tasks listed as enrollment steps on the Program Summary page that appear after clicking the Begin Enrollment button.

8.3.2. Exceptions/Special Scenarios

If a task is not applicable to the program enrollment based on the program or answers to the My Profile Survey, the task will not appear. See specific task sections for more information on when these tasks are available.

8.4. Help Desk Dependencies

Business Owner Approval, Credit Card Authorization, Certification Test Kit, and Help Desk Approval, tasks appear as enrollment steps, but are managed and completed by the Help Desk.

8.5. Pre-prod Differences

No change in functionality for Pre-Prod.

9. Additional Contact Information

9.1. General Purpose

The Additional Contact Information page displays the required and optional contact information sections the user can provide to USPS. This tab can be accessed after the user has selected the Begin Enrollment button for their chosen program.

9.2. Business Rules

9.2.1. Availability

The 'Technical Contact Information' section is required and the 'Alternative Primary Contact Information' section is optional. For user's convenience, the 'Technical Contact Information' is automatically populated by the system. Users will still have the ability to update these values if needed.

9.2.2. Required v. Optional Components

For Shipping Services, each field, excluding Address 2, Fax Number and Phone number extension, is required in the Technical Contact Information section to complete the task.

9.3. Page Features

9.3.1. Functionality

- Country drop-down menu: User can select the appropriate country for their contact.
- Name text field: User can enter their contact's first and last name.
- Address 1 text field: User can enter their contact's primary address.
- Address 2 text field: User can enter their contact's secondary address.
- City text field: User can enter their contact's residing city.
- State text field: User can enter their contact's residing state (province for foreign countries).
- ZIP/Postal Code text field: User can enter their contact's zip or postal code.
- Phone text field: User can enter their contact's phone number.
- EXT text field: User can enter their contact's phone number extension.
- Email text field: User can enter their contact's email address.
- Fax text field: User can enter their contact's fax number.
- Save button: User can save inputted contact information. When the user selects save, the system will store the included information in the Program Registration database.

>>

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary

Additional Contact Information
Complete

Certification Questionnaire
Complete

Manage Shipping Locations
Incomplete

Certification Test Kit
Incomplete

Manage Payment Accounts
Incomplete

Manage Clients
Incomplete

Alternative Primary Contact Information (Optional)

Country:

Name:

Address 1:

Address 2:

City:

State:

ZIP/Postal Code:

Phone Number:

Ext:

Email:

Fax Number:

Technical Contact Information (Required)

Country:*

Name: *

Address 1:*

Address 2:

City:*

State:*

ZIP/Postal Code:*

Phone Number:*

Ext:

Email:*

Fax Number:

Required fields are marked with *

[Save](#)

Figure 9.1 - Additional Contact Information: Display for Shipping Services

9.3.2. Exceptions/Special Scenarios

Users cannot submit partial data for a contact and will be required to complete all contact information at one time. If a user begins to complete the optional section, all fields, excluding 'Ext' and 'Address 2', must be submitted.

9.4. Help Desk Dependencies

The Help Desk is able to view all additional contact information.

9.5. Post-Enrollment Functionality

Users will be able to change the additional contact information after enrollment is complete.

9.6. Pre-Prod Differences

No change in functionality for Pre-Prod.

10. Certification Questionnaire

10.1. General Purpose

The Certification Questionnaire is a required step in the enrollment process for all the Shipping Services. It collects information regarding the eDoc file transmissions between USPS and the user, generation of barcoded labels, reporting from USPS to the user, transmitted file formats, and other user preferences.

10.2. Business Rules

10.2.1. Availability

The Certification Questionnaire is available if the user is enrolling in a Shipping Service.

10.2.2. Required v. Optional Components

Each question displayed in the Certification Questionnaire must be answered and saved in order for the task status to change to 'Complete'.

10.3. Page Features

10.3.1. Functionality

- Save & Continue button: Users can save their answers and continue to the next incomplete question.
- Save & Close button: Users can save their answers and return to the Program Summary page.
- Navigation: The user may navigate between questions by selecting the appropriate questions tab in the Questionnaire.

10.3.2. Exceptions/Special Scenarios

If the user attempts to navigate away from a question before saving their answer, a pop-up window displays informing the user if they would like to save their answer before leaving the questionnaire.

10.4. Help Desk Dependencies

10.4.1. Help Desk view and edit capabilities

The Help Desk can view and edit specific questions in a user's Certification Questionnaire. Refer to the internal user guide for additional information.

10.4.2. Business Owner Approval

The Business Owner Approval task is only for those users who are enrolling in Scan Based Payment (SBP). Once the user has completed the Additional Contact Information task, they will not be able to continue enrollment until the Business Owner Approval task has been marked "Complete" by the Help Desk or Program Office. Once the task is marked complete, the remaining tasks for enrolling are enabled and the user can continue the enrollment process.

10.5. Post-Enrollment Functionality

Once the user has successfully enrolled in a Shipping Service, the user will not be allowed to modify their answers in the Certification Questionnaire. All their saved answers will be locked in and the radio buttons for each question will be disabled. The user can request changes to specific questions through the Help Desk.

10.6. Pre-Prod Differences

No change in functionality for Pre-Prod.

11. Manage Shipping Locations

11.1. General Purpose

The Manage Shipping Locations page allows the user to add shipping locations to a Shipping Services program (eVS, PRS, PMEM, SBP, BPOD, or Tracking Only). The user can search for specific shipping locations, register new locations in Customer Registration, and add locations to the program.

11.2. Business Rules

11.2.1. Availability

The Manage Shipping Locations page is only accessible after the Certification Questionnaire has been completed and does not display when the task on the Program Summary page has a status of Not Available. Once the Certification Questionnaire has been completed and the task status on the Program Summary page updates to Incomplete, the tab appears with a status of Incomplete.

11.2.2. Required Components

- In order for the task to be marked as Complete, the user must have at least one shipping location fully certified (if certification is applicable).
- In the case that certification is not applicable (i.e. if the user is mailing with Shipping Assistant), the task will be marked as Complete when a MID has been requested for at least one shipping location.

11.3. Page Features

11.3.1. Functionality

- Data Tables: The two data tables display different information. The top table displays shipping locations that the user has added to the program and the bottom table displays the search results returned from the Search for Locations page. It is important to note that the shipping locations in the top table are not fully registered to the program. Registration is only complete after locations have been assigned a MID and applicable label and file certifications are complete.

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary
Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.
MID Owner CRID: 20174780

Additional Contact Information Complete
Filter Locations: [Filter](#) [Request New MID](#)
Show All Per Page: 20

Certification Questionnaire Complete

<input type="checkbox"/>	MID	MID User CRID	MID User Company	MID User Address	6-digit MID	Certifications
<input type="checkbox"/>	900014652	20174780	AUTUMN COMP 276	276 Campus Dr	-	0 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

Manage Shipping Locations Incomplete
To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MID's below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID. [Link MID to Program](#)

Certification Test Kit Incomplete

<input type="checkbox"/>	MID	MID User CRID	MID User Company	Program Name
Nothing found to display.				

Manage Payment Accounts Incomplete
Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Figure 11.1 - Manage Shipping Locations - Data table displays

- Request New MID button: The Request New MID button allows the user to request a MID for a shipping location in the top table. The MID populates in the MID column of the table, as shown below. Requesting a MID activates the certification process, when applicable, by triggering the label and file certification statuses to change from “N/A” to “Incomplete.”

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary
Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.
MID Owner CRID: 701049 ?

Additional Contact Information Complete
Filter Locations: [Filter](#) [Request New MID](#)
Show All --Select Category-- Per Page: 20

Certification Questionnaire Complete
Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 1 of 1

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: CSV | Excel | XML | PDF

Manage Shipping Locations Complete
To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID. [Link MID to Program](#)

Certification Test Kit Complete
Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Manage Payment Accounts Complete
Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Figure 11.2 - Manage Shipping Locations: Request New MID button

- Linked MID column: The Linked MID column is populated if the Help Desk has associated a 6-digit MID with the shipping location. If no 6-digit MID is associated with the location, a "-" appears in the column.

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.
MID Owner CRID: 701049 ? [Request New MID](#)

Additional Contact Information Complete Filter Locations: [Filter](#)
Show All --Select Category-- Per Page: 20

Certification Questionnaire Complete Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 1 of 1

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

Manage Shipping Locations Complete To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID. [Link MID to Program](#)

Certification Test Kit Complete Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Manage Payment Accounts Complete Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Figure 11.3 - Manage Shipping Locations: Linked MID column not populated

- **Filters:** The filters allow the user to filter the top table by address, CRID, Company, MID, or 6-digit MID. To filter by any category, the user should select the category from the drop down menu, enter a valid keyword or number to search by, and select the "Filter" button. For example, if the user wants to filter by the address 123 Main Street, they would enter "123 Main Street" in the textbox, select Address from the category drop-down and select the "Filter" button.

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Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.

MID Owner CRID: 701049 [Request New MID](#)

Additional Contact Information Filter

Filter Locations: Per Page: 20

Show All --Select Category--

Certification Questionnaire Only one MID/location can be selected at a time. Showing 1 - 1 of 1

	MID	MID CRID	User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

Manage Shipping Locations To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID. [Link MID to Program](#)

Certification Test Kit Showing 0 - 0 of 0

	MID	MID User CRID	MID User Company	Program Name
Nothing found to display.				

Manage Payment Accounts Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Manage

Figure 11.4 - Manage Shipping Locations: Filter display

- Certifications:** The Certifications column displays a link that navigates the user to the Manage Certifications page. The link shows the number of Certification types that have completed the certification process out of the total number of certifications (i.e.: 2 of 3 Complete for users who have 2 certifications complete of 3 totals).

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary
 Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.
 MID Owner CRID: 701049 ? [Request New MID](#)

Additional Contact Information Complete
 Filter Locations: [Filter](#)
 Show All --Select Category-- Per Page: 20 

Certification Questionnaire Complete
 Only one MID/location for each MID User CRID can be selected at a time. Showing 1 of 1

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: CSV | Excel | XML | PDF

Manage Shipping Locations Complete
 To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID. [Link MID to Program](#)

Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Manage Payment Accounts Complete
 Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Manage

Figure 11.5 - Manage Shipping Locations: Certifications Link

- Link MID to Program: The bottom data table displays MIDs available to import to the program. The MIDs available will display on the bottom table. By selecting the checkbox next to the MID to be imported and clicking the "Link MID to Program" the MID would be imported to the program.

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.

MID Owner CRID: 701049

Additional Contact Information [Request New MID](#)
 Complete Filter Locations: [Filter](#)

Certification Questionnaire Per Page: 20 ▾
 Complete Show All --Select Category-- ▾

Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 1 of 1

	MID	MID User CRID	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID.

Manage Shipping Locations [Link MID to Program](#)
 Incomplete

Certification Test Kit Showing 1 - 1 of 1
 Incomplete

	MID	MID User CRID	MID User Company	Program Name
<input type="checkbox"/>	900014657			Electronic Verification System (eVS)

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

Manage Payment Accounts [Add Locations](#)
 Incomplete

Looking for a location that is not displayed above? Click the "Add Locations" button.

Figure 11.6 - Manage Shipping Location: Link MID to Program

- Add Locations: The user can search for shipping locations that are not already listed in the top table. Selecting the "Add Locations" button directs the user to the Search for Locations screen described below.

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Program Summary
Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.
MID Owner CRID: 701049

Additional Contact Information Complete
Filter Locations: [Filter](#) [Request New MID](#)
Show All Per Page: 20

Certification Questionnaire Complete
Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 1 of 1

	MID	MID User CRID	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

Manage Shipping Locations Complete
To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID.

[Link MID to Program](#) Showing 0 - 0 of 0

<input type="checkbox"/>	MID	MID User CRID	MID User Company	Program Name
Nothing found to display.				

Certification Test Kit Complete

Manage Payment Accounts Complete

Manage

Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)



Figure

11.7 - Manage Shipping Location: Add Locations button

- Search for Locations screen: The user can search for an individual location by filling out the fields displayed under the "Search for Shipping Location" heading. All fields, except Address 2, are required to search for a shipping location. The user can bulk import multiple locations by browsing for a file to import. A link to the appropriate template is provided.
- Search for Location by CRID : The user can search for a specific CRID within the Program Registration application. If found, it will follow the same process of adding the location if the user had searched by an address or bulk uploaded a list of addresses.



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Program Summary

Additional Contact Information
Complete

Certification Questionnaire
Complete

Manage Shipping Locations
Complete

Certification Test Kit
Complete

Manage Payment Accounts
Complete

Manage Clients
Complete

Search for Shipping Location by Company

The fields required to search for an existing location by company are noted below. If your location is not found, it will be added to the list of locations on the previous page.

Company Name:*

Country:*

Address 1:*

Address 2:

City:*

State:*

ZIP/Postal Code:*

[Search](#)

Search for Client Location by MID User CRID ?

MID User CRID: ?

[Search](#)

Bulk Import Shipping Locations [Download Template](#)

Please note that processing files with a large number of records takes time. During this process, you can continue to work in the application. Records will become available as they are processed. Return to this page to see the overall progress of your upload.

File Name: No file selected.

[Import](#)

Showing 0 - 0 of 0

	MID User CRID ?	MID User Company	MID User Address	Status	Action
<input type="checkbox"/>	Nothing found to display.				

[Add Locations](#)

Figure 11.8 - Manage Shipping Locations: Search for Locations screen

The search results will display in the bottom table of the main Manage Shipping Locations page with a status of Found (i.e., the location already exists in Customer Registration), Multiple Found (i.e., multiple location matching the search criteria exist in Customer Registration), or Not Found (i.e., the location does not exist in Customer Registration). Under the Action column, the user can select the “Edit” link to return to the Search for Locations screen to edit search criteria.

- Add Locations button: The Add Locations button allows the user to add a location from the search results to the top table by selecting the checkbox next to the location and clicking the button. If the location has a status of “Not Found” in the bottom table, the location will be registered in Customer Registration upon selecting the button.

Figure 11.8 - Manage Shipping Locations: Add Locations button

- **Business Verification screen:** Once a new location is submitted and successfully added to our records, the user may be prompted with a new screen in which user is asked to select a business location from our existing records. This information is used by USPS while verifying user's business name and address. The selected choice will not impact user's mailing address.

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Program Summary

Additional Contact Information
Complete

Certification Questionnaire
Complete

Manage Shipping Locations
Incomplete

Business Verification

Your company information is successfully added to our records.

Now, please help us verify your business name and address. Making a selection will not impact your mailing address.

Existing Records

	COMPANY NAME	ADDRESS LINE1	CITY	STATE	ZIP
<input checked="" type="radio"/>	Accenture	901 D St	Washington DC	DC	20016
<input type="radio"/>	Booz	901 C St	Washington DC	DC	20016
<input type="radio"/>	JuanPT3 Company	10 June St.	Alexandro	VA	23223
<input type="radio"/>	None of the above				

[OK](#)

Figure 11.9 - Manage Shipping Location: Business Verification

- **Export options:** The Manage Shipping Locations page allows the user to export the data in the tables to CSV, Excel, or XML format by clicking the respective link underneath each data table.

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Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary Below are your current locations configured for Electronic Verification System (eVS). If you would like a new Mailer ID, choose the location below and click the "Request New MID" button.

MID Owner CRID: 701049 ? [Request New MID](#)

Additional Contact Information Filter

Filter Locations: Per Page: 20

Show All --Select Category--

Certification Questionnaire Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 1 of 1

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	153854488	701049	Toronto Raptors	295 Forest Hill Rd	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

Manage Shipping Locations To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. If you do not see one of your existing MIDs below, it may not be eligible for this program. Click the "Request New MID" button to obtain a new, eligible MID. [Link MID to Program](#)

Certification Test Kit Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Manage Payment Accounts Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Manage

Figure 11.10 - Manage Shipping Locations: Export options

- **Pagination:** The user can adjust the number of shipping locations displayed per page with the Per Page drop-down menu. The page can display 20, 40, 80, or 100 shipping locations per page. A <Next> link appears when there is another page of shipping locations and a <Previous> link appears when there is a previous page of shipping locations.

11.3.2. Exceptions/Special Scenarios

- **Select All checkbox:** The select all checkbox is at the top of the checkbox column. When the select all checkbox is selected, only the shipping locations on the page displayed are selected, not all the shipping locations.
- **Saving File and Label Certification:** When the user updates the status of either the file or label certification status for a shipping location, the change must be

saved by the user. The user must select the checkbox of the shipping location, change the statuses as desired, and select the “Save” button in order to save the changes made.

- Select Category for filters: The user will receive an error message without selecting a category when filtering.
- Bulk Import file format: The format of the data imported must match the template format; otherwise the file will not be imported.
- Removing Added Locations: After adding a shipping location to the program, neither the user nor the Help Desk can remove the location from the program.
- Page is updated for SBP and PRS programs with new instructions.

11.4. Help Desk Dependencies

11.4.1. File and Label Certification

If the Help Desk approves the certification submitted, the external user will see the status of “Complete” on the Manage Shipping Locations page for both file and label certification. Completion of the file and label certification for a shipping location effectively adds that location to the program.

11.5. Post-Enrollment Functionality

After enrollment into a program, the user can search for and add shipping locations to the program. As is the case prior to successful enrollment, neither the user nor the Help Desk can remove a shipping location from a program once it has been added.

11.6. Pre-Prod Differences

Much of the Manage Shipping Locations functionality is disabled in the Pre-Production environment. New MIDs cannot be created in Pre-Prod, and therefore, the “Request MID” button is removed in the Pre-Prod environment. If an additional MID is required, new MIDs created in the Production environment will display in the second table. Existing Production MIDs can be linked to your Pre-Prod enrollment by selecting the MID from the second table and select the “Link MID to Program” button in Pre-Prod.

In addition to disabling the Create MID functionality, new business locations cannot be added in Pre-Prod. The “Add Locations” button is removed in the Pre-Prod environment.

12. Manage Certifications page

12.1. General Purpose

The Manage Certifications page allows the user to maintain their certification profiles for a given Shipping Services program (eVS, PRS, PMEM, SBP, BPOD or Tracking Only). The user can view certification process and update File and Label Certification statuses.

12.2. Business Rules

12.2.1. Availability

The Manage Certifications page is only accessible after a MID has been requested within the Manage Shipping Locations or Manage Clients task. Access to the Manage Certifications page is available via the link in the “Certifications” column on the Manage Shipping Locations or Manage Clients page.

12.2.2. Required Components

In order for Overall Certification to be marked as Complete, the user must have at least one certification type fully certified (if certification is applicable).

12.3. Page Features

12.3.1. Functionality

- Data Table: The table displays the Certification Type (determined by various answers to the My Profile Survey and Certification Questionnaire), Label Certification, File Certification, and the Overall Certification status.
- Label/File Certification drop-downs: The Label and File Certification drop-down menus will initially display “Incomplete” for a MID. If the Help Desk updates the Certification Test Kit task to “Complete”, these drop-downs will display “Pending”. From either “Incomplete” or “Pending”, the customer can change the drop-down to “Submitted” to signify that they have submitted the Test Kit for approval. Once the Help Desk has received the Test Kit, they will mark the Label and File Certification statuses as “Approved” or “Rejected”. If “Rejected”, the customer is able to set the status to “Resubmitted”.

Manage Certifications

CRID 700208, MID 808114515

Showing 1 - 1 of 1

<input type="checkbox"/>	Certification Type	Label Cert.	File Cert.	Overall Cert Status
<input checked="" type="checkbox"/>	01 - Tracking and Postage	Complete ▾	Complete ▾	Complete

8/4/

Export options: [CSV](#) | [Excel](#) | [XML](#)

[Save](#) [Close](#)

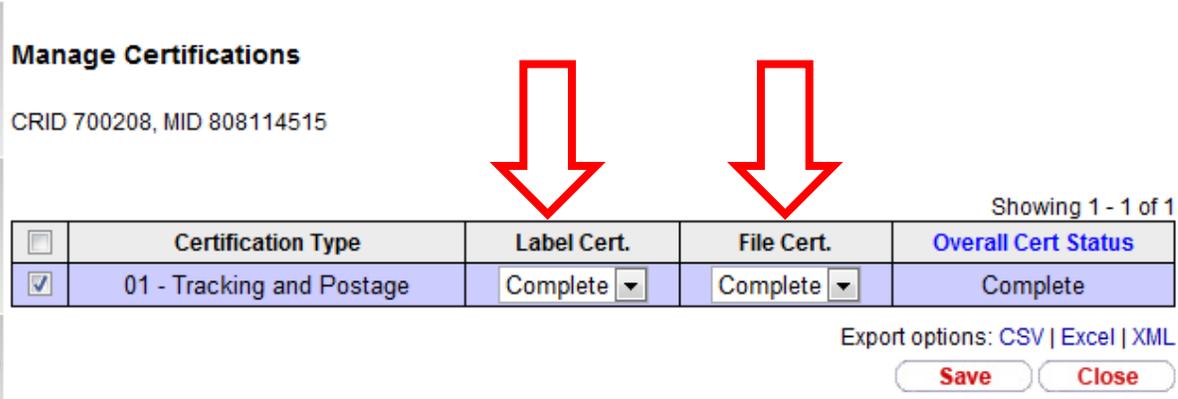


Figure 12.1 - Manage Certifications: Label and File Cert columns

- Overall Cert Status: Initial value for a MID Certification is “Pending”. Once the Label/File certifications are complete, the overall Cert Status for that MID Certification will be set to “Complete”. A Help Desk may update the overall Cert Status to “Inactive” whenever that MID Certification is no longer being used.

	Certification Type	Label Cert.	File Cert.	Overall Cert Status
<input checked="" type="checkbox"/>	01 - Tracking and Postage	Complete ▾	Complete ▾	Inactive

Figure 12.2 - Manage Certifications: Label and File Cert columns

- Save Button: The Save button is used to save any Certification Status changes that are made. For instance, if the customer updates the Label Status from Pending to Submitted, they must select the checkbox and click the Save button.
- Close Button: The Close button navigates the customer back to the Manage Shipping Locations page

12.4. Help Desk Dependencies

12.4.1. File and Label Certification

- The completion of the file and label certification for a certification profile requires action from both internal and external users. The certification process begins with the completion of the Certification Questionnaire. Upon completion of the questionnaire, the Certification Test Kit status automatically changes from “Not Available” to “Pending” if label and file certification are required. The Help Desk must complete the Certification Test Kit task before the external user can submit file or label certifications. If the user requests a MID for a shipping location before the Help Desk completes the Certification Test Kit task, the file and label certification statuses changes from “N/A” to “Incomplete.”
- Once the Certification Test Kit task is complete, the external user can change the “Incomplete” status of the file and label certifications to “Submitted.” After the file and label certification have been submitted, the Help Desk is responsible for rejecting or approving the certifications. The Help Desk updates the status to “Pending” after receiving the files from the external user.
- If the Help Desk rejects the certification submitted, the external user will see the status of “Rejected” on the Manage Shipping Locations page for both file and label certification. The external user can re-submit certification by selecting “Re-submitted” from the drop down menus. Upon re-submission, the Help Desk can either reject or approve the file and label certification.

- If the Help Desk approves the certification submitted, the external user will see the status of “Complete” on the Manage Shipping Locations page for both file and label certification. Completion of the file and label certification for a shipping location effectively adds that location to the program.

12.5. Pre-Prod Differences

No change in functionality in Pre-Prod.

13. Manage Payment Accounts

13.1. General Purpose

The purpose of the Manage Payment Accounts page is to link a permit, USPSCA, or Federal Agency account to the program. The type of payment account depends on the selected program or service.

Additionally, customers of certain Shipping services (eVS, PRS, and SBP) can use the Manage Payment Accounts page in order to create new permits and/or CAPS accounts, which may be required for participation in those services.

13.2. Business Rules

13.2.1. Availability

- The task is available for eVS, PRS, PMEM, and SBP after the Certification Questionnaire, if applicable, is complete.
- The task is not available for Tracking Only enrollment.

13.2.2. Required v. Optional Components

The task is required for all programs/services for which it is available.

13.3. Page Features

13.3.1. Functionality for eVS, PRS, and SBP

- Checkboxes: Allow the user to select one or multiple permits.
- Link button: Allows the user to link selected permit to program.
- Unlink button: Allows the user to unlink selected permit from program.
- Filter button: Filters results based on filter textbox and category (CAPS Account, Permit type, CRID, Status).

- Sorting: User can sort the table by any of the columns. The first time the column header is selected, the results are sorted alphanumerically. The next time the header is selected, the results are sorted reverse alphanumerically.
- Pagination: The page displays the number of results being displayed in the format 'Showing 1-20 of 45'. The user is able to select a different amount of records to display by selecting 20, 40, 60, 80, or 100 in the drop-down menu. The <Previous and Next> links appear when additional pages of records exist.
- Table display: The table will display the Permit number, the CRID associated to the permit, the link status (Linked or Not Linked), the type of permit, the ZIP/Postal Code of the permit, and the CAPS account associated with the permit.
- Create Permit: The "Create Permit" button allows customers to create a new permit automatically via an electronic interface with *PostalOne!*
- Create CAPS Account: The Create CAPS Account functionality allows the user to have the CAPS Admin group link existing CAPS accounts to their permit or create a new CAPS account electronically through ACH Online, another USPS application that is linked directly from Program Registration. After creating a new CAPS account in ACH Online, users are directed back to Program Registration where their new account information is displayed. (Figure 13.1.0)
- Only MR Permit Type can be requested/ linked for SBP program (Figure 13.1.1).



Electronic Verification System (eVS)

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Program Summary

Both a permit and CAPS (Centralized Account Payment System) account are required for participation in the Electronic Verification System (eVS). Packages shipped under this program will bear a permit imprint indicia to indicate that postage has been paid. A permit is required to use this type of postage evidencing.

Additional Contact Information

Complete

Payment for postage will be deducted at the time of mailing from your CAPS account. CAPS provides business mailers a centralized, convenient, and cost-effective way to pay for USPS products and services. USPS currently supports online creation of ACH Debit type CAPS accounts. [?](#)

[Link](#) [Unlink](#)

Certification Questionnaire

Complete

Show All --Select Category--

Per Page: 20

Filter Permits: [Filter](#)

Showing 0 - 0 of 0

CRID ?	Permit Account Number	Permit Type	Permit Number	Permit ZIP	Status
Nothing found to display.					

Manage Shipping Locations

Incomplete

To create a new permit, select the "Create Permit" button.

[Create Permit](#)

Certification Test Kit

Incomplete

To open a new CAPS account to use for this program, select a Permit from the table above and the option below that describes the CAPS account you want to use for this program.

I have a CAPS account number I would like to use for this program:

[OK](#)

I need a new CAPS account:

[Create CAPS Account](#)

Manage Payment Accounts

Incomplete

Manage Clients

Incomplete

Figure 13.1.0 - Manage Payment Accounts: eVS, PRS display

UNITED STATES POSTAL SERVICE® USPS.COM | GATEWAY | HELP | SIGN OUT

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Scan Based Payment (SBP)

Program Summary
Complete

Additional Contact Information
Complete

Certification Questionnaire
Complete

Manage Shipping Locations
Complete

Manage Payment Accounts
Complete

Manage Clients
Complete

A permit is required for participation in Scan Based Payment (SBP). Packages shipped under this program will bear return services (for return shipments) indicia to indicate that postage has been paid. A permit is required to use this type of postage evidencing. Annual permit fee and account maintenance fee for Return Services permits are waived for customers shipping at least one item per year.

Payment for postage will be deducted at the time of mailing from your CAPS account. CAPS provides business mailers a centralized, convenient, and cost-effective way to pay for USPS products and services. We currently support online creation of ACH Debit type CAPS accounts.

ACH Debit - Customers designate a debit-enabled bank account for transaction charges. The bank account is debited for the total days transactions at the end of the day. Bank accounts must be business accounts and not personal bank accounts.

Filter Permits:

Per Page:

Showing 1 - 1 of 1

CRID	Permit Account Number	Permit Type	Permit Number	Permit ZIP	Status
6150201	25471 (CAPS)	MR	844346	20260	Not Linked

To create a new permit, select the "Create Permit" button.

Figure 13.1.1 - Manage Payment Accounts: SBP display

13.3.2. Functionality for PMEM

- **Textbox:** The user enters an USPSCA or Federal Agency account number in the textbox.
- **Drop-down menu:** The user selects USPSCA or Federal Agency from the drop-down menu.
- **Validation errors:** Appendix A contains the validations run against the textbox and drop-down menu for PMEM.
- **Filter button:** Filters results based on the filter textbox and category (Account Number, Account Type, or Status).
- **Sorting:** User can sort the table by any of the columns. The first time the column header is selected, the results are sorted alphanumerically. The next time the header is selected, the results are sorted reverse alphanumerically.
- **Pagination:** The page displays the number of results being displayed in the format 'Showing 1-20 of 45'. The user is able to select a different amount of

records to display by selecting 20, 40, 60, 80, or 100 in the drop-down menu. The <Previous and Next> links appear when additional pages of records exist.

- **Table display:** The table will display the Account Number, the account type (USPSCA or Federal Agency), and the link status (Pending, Approved, or Rejected).

Priority Mail Express Manifesting (PMEM) [Unenroll](#) [Back to Enrollment Home](#)

Program Summary
Enter USPS Corporate or Federal Agency Account(s)

Additional Contact Information Per Page: 20
 Filter Accounts:
 Show All --Select Category--

Showing 1 - 2 of 2

Account Number	Status	Type
123	Approved	Federal Agency
123456	Pending	USPS Corporate Account

PMEM Contact Information Complete

Certification Questionnaire Complete

Manage Shipping Locations Complete 1

Certification Test Kit Complete

Manage Payment Accounts Complete 1

Figure 13.2 - Manage Payment Accounts: PMEM display

13.3.3. Exceptions/Special Scenarios

- For PMEM, when a payment account is added, its status is 'Pending' until the Help Desk approves or rejects it. At least one payment account must be in the status Approved for the Manage Payment Accounts task status to be Complete.
- For SBP, only Permit Imprint (PI) and Merchandise Return (MR) permits are able to be used.

13.4. Help Desk Dependencies

- The Help Desk is able to link and unlink payment accounts for eVS, PRS, and SBP programs.
- For PMEM, the Help Desk must approve each USPSCA or Federal Agency account added to the PMEM program through the 'PMEM Pay Account' task.

13.5. Post-Enrollment Functionality

- For eVS, PRS, and SBP, permits cannot be unlinked from the program after enrollment. However, permits can be linked to the program after enrollment.
- For PMEM, payment accounts cannot be unlinked from the program after enrollment. However, payment accounts can be linked to the program after enrollment.

13.6. Pre-Prod Differences

The Pre-Production Manage Payment Accounts functionality is similar to Production. Production permits will not be useable in Pre-Prod, but Pre-Prod permits can be created using the same “Create Permit” functionality that exists in Production. New Pre-Prod permits can be linked in the same way permits are linked in Production. One key difference between Pre-Prod and Production is CAPS Accounts cannot be created in Pre-Prod, therefore the “Create CAPS” functionality does not display in Pre-Prod.

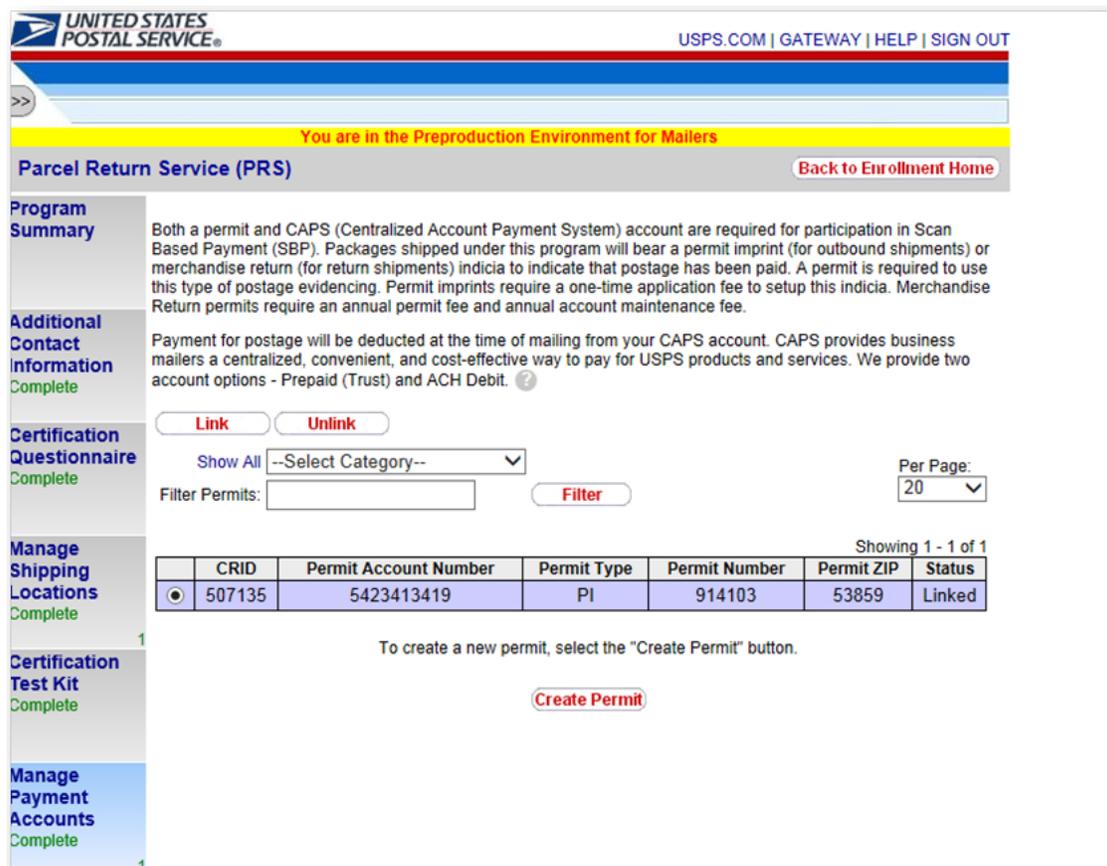


Figure 13.3 – Pre-Prod Manage Payment Accounts page

14. Manage Clients

14.1. General Purpose

The Manage Clients page allows the external MSP user to add client locations to a Shipping Services program (eVS, PRS, PMEM, SBP, or Tracking Only). The user can search for a specific client location, register new locations in Customer Registration, and add locations to the program.

14.2. Business Rules

14.2.1. Availability

- The Manage Clients page is only available to users who designated themselves as mail service providers (MSPs) in Customer Registration. Users may update their MSP status by clicking on the link stating “Click here to view or update your MSP indicator” on the Enrollment Home page.
- The Manage Clients page is only accessible after the Certification Questionnaire has been completed and does not display when the task displays on the Program Summary page has a status of Not Available. Once the Certification Questionnaire has been completed and the enrollment task status on the Program Summary page updates to Incomplete, the tab appears with a status of Incomplete.

14.2.2. Required Components

- In order for the task to be marked as ‘Complete’ the user must have at least one client location fully certified (if certification is applicable).
- In the case that certification is not applicable (i.e. if the user is mailing with Shipping Assistant), the task will be marked as Complete when a By/For MID has been requested for at least one client location.

14.3. Page Features

14.3.1. Functionality

- Data Tables: The two data tables display different information. The top table displays client locations that the user has added to the program and the bottom table displays the search results returned from the Search for Locations page. It is important to note that the client locations in the top table are not fully registered to the program. Registration is only complete after locations have been assigned a MID and applicable label and file certifications are complete.

Filter Locations: [Filter](#) [Request New MID](#)

Show All Per Page: 20

Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 2 of 2

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	-	123456789	NA	445 Cork Harbour Cir	-	0 of 0 Complete
<input type="checkbox"/>	102610355	123456789	NA	445 Cork Harbour Cir	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. [Link MID to Program](#)

Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Figure 14.1 - Manage Clients - Data table displays

- **Export options:** The user can export the data in the tables to CSV, Excel, or XML format by clicking the respective link underneath each data table.
- **Pagination:** The user can adjust the number of shipping locations displayed per page with the Per Page drop-down menu. The page can display 20, 40, 80, or 100 shipping locations per page. A <Next> link appears when there is another page of shipping locations and a <Previous> link appears when there is a previous page of shipping locations.
- **Request New MID button:** The Request New MID button allows the user to request a MID for a shipping location in the top table. The MID populates in the MID column of the table, as shown below. Requesting a MID activates the certification process, when applicable, by triggering the label and file certification statuses to change from "N/A" to "Incomplete."

Filter Locations: [Filter](#) [Request New MID](#)

Show All Per Page: 20

Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 2 of 2

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	-	123456789	NA	445 Cork Harbour Cir	-	0 of 0 Complete
<input type="checkbox"/>	102610355	123456789	NA	445 Cork Harbour Cir	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. [Link MID to Program](#)

Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Figure 14.2 - Manage Clients: Request New MID button

- **Linked MID column:** The Linked MID column is populated if the Help Desk has linked another MID with the shipping location. If no MID is linked with the location, a "-" appears in the column.

Filter Locations: [Filter](#) [Request New MID](#)

Show All Per Page: 20

Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 2 of 2

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	-	123456789	NA	445 Cork Harbour Cir	-	0 of 0 Complete
<input type="checkbox"/>	102610355	123456789	NA	445 Cork Harbour Cir	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

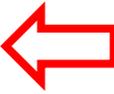
To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button. [Link MID to Program](#)

Showing 0 - 0 of 0

	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Figure 14.3 - Manage Clients: Linked MID column not populated

- **Filters:** The filters allow the user to filter the top table by address, CRID, or MID. To filter by any category, the user should select the category from the drop down menu, enter a valid keyword or number to search by, and select the "Filter" button. For example, if the user wants to filter by the address 123 Main Street, they would enter "123 Main Street" in the textbox, select Address from the category drop-down and select the "Filter" button.

Filter Locations: [Filter](#) 

[Request New MID](#)

Show All --Select Category-- Per Page: 20

Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 2 of 2

	MID	MID User CRID	User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	-	123456789	NA	445 Cork Harbour Cir	-	0 of 0 Complete
<input type="checkbox"/>	102610355	123456789	NA	445 Cork Harbour Cir	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

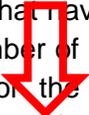
To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button.

[Link MID to Program](#)

Showing 0 - 0 of 0

<input type="checkbox"/>	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Figure 14.4 - Manage Clients: Filter display

- **Certifications:** The Certifications column displays a link that navigates the user to the Manage Certifications page. The link shows the number of Certification types that have completed the certification process out of the total number of certifications (i.e.: 2 of 3 Complete for users who have 2 certifications complete of 3 total). 

Only one MID/location for each MID User CRID can be selected at a time. Showing 1 - 2 of 2

	MID	MID User CRID ?	MID User Company	MID User Address	Linked MID	Certifications
<input type="checkbox"/>	-	123456789	NA	445 Cork Harbour Cir	-	0 of 0 Complete
<input type="checkbox"/>	102610355	123456789	NA	445 Cork Harbour Cir	-	1 of 1 Complete

Export options: [CSV](#) | [Excel](#) | [XML](#) | [PDF](#)

To add an existing MID to your Electronic Verification System (eVS) profile, select it below and click the "Link MID to Program" button.

[Link MID to Program](#)

Showing 0 - 0 of 0

<input type="checkbox"/>	MID	MID User CRID ?	MID User Company	Program Name
Nothing found to display.				

Looking for a location that is not displayed above? Click the "Add Locations" button. [Add Locations](#)

Figure 14.5 - Manage Clients: Certifications Link

- **Add Locations Button:** The user can search for (and add) client locations that are not already listed in the top table. Selecting the "Add Locations" button directs the user to the Search for Locations screen (described below).
- **Search for Client Locations screen:** The user can search for an individual location by address (Address 2 field not required) or by MID User Crid.

- The user can bulk import multiple locations by browsing for a file to import. A link to the appropriate template to use is provided.

Search for Client Location

The fields required to search for an existing location by company are noted below. If your location is not found, it will be added to the list of locations on the previous page.

Company Name:*

Country:*

Address 1:*

Address 2:

City:*

State:*

ZIP/Postal Code:*

Search for Client Location by MID User CRID ?

MID User CRID: ?

Bulk Import Shipping Locations [Download Template](#)

Please note that processing files with a large number of records takes time. During this process, you can continue to work in the application. Records will become available as they are processed. Return to this page to see the overall progress of your upload.

File Name: No file selected.

Showing 0 - 0 of

<input type="checkbox"/>	MID User CRID ?	MID User Company	MID User Address	Status	Action
Nothing found to display.					

Figure 14.6 - Manage Clients: Search for Client Locations screen

The search results will display in the bottom table of the main Manage Clients page with a status of Found (i.e., the location already exists in Customer Registration), Multiple Found (i.e., multiple location matching the search criteria exist in Customer Registration), or Not Found (i.e., the location does not exist in Customer Registration). Under the Action column, the user can select the “Edit” link to return to the Search for Clients screen to edit search criteria.

- Add Locations button:** By selecting the checkbox of a location, and clicking the Add Locations button, the user can add a location from the search results to the top table of the previous screen. If the location has a status of “Not Found”, the location will be registered in Customer Registration upon selecting the button.

- **Business Verification screen:** Once a new location is submitted and successfully added to our records, the user may be prompted with a new screen in which the user is asked to select a business location from our existing records. This information is used by USPS while verifying user’s business name and address. The selected choice will not impact user’s mailing address.

Electronic Verification System (eVS) [Back to Enrollment Home](#)

Program Summary **Business Verification**

Your company information is successfully added to our records.

Now, please help us verify your business name and address. Making a selection will not impact your mailing address.

Additional Contact Information Complete

Certification Questionnaire Complete

Manage Shipping Locations Incomplete

Existing Records

	COMPANY NAME	ADDRESS LINE1	CITY	STATE	ZIP
<input checked="" type="radio"/>	Accenture	901 D St	Washington DC	DC	20016
<input type="radio"/>	Booz	901 C St	Washington DC	DC	20016
<input type="radio"/>	JuanPT3 Company	10 June St.	Alexandro	VA	23223
<input type="radio"/>	None of the above				

[OK](#)

Figure 14.7 - Manage Clients: Business Verification

14.3.2. Exceptions/Special Scenarios

- **Select All checkbox:** The select all checkbox is at the top of the checkbox column. When the select all checkbox is selected, only the client locations on the page displayed are selected, not all the client locations.
- **Saving File and Label Certification:** When the user updates the status of either the file or label certification status for a shipping location, the change must be saved by the user. The user must select the checkbox of the client location, change the statuses as desired, and select the “Save” button in order to save the changes made.
- **Select Category for filters:** The user will receive an error message without selecting a category when filtering.
- **Bulk Import file format:** The format of the data imported must match the template format; otherwise the file will not be imported.
- **Removing Added Locations:** After adding a client location to the program, neither the user nor the Help Desk can remove the location from the program.

14.4. Help Desk Dependencies

14.4.1. File and Label Certification

- The completion of the file and label certification for a shipping location requires action from both internal and external users. The certification process begins with the completion of the Certification Questionnaire. Upon completion of the questionnaire, the Certification Test Kit status automatically changes from “Not Available” to “Pending” if label and file certification are required. The Help Desk must complete the Certification Test Kit task before the external user can submit file or label certification. If the user requests a MID for a shipping location before the Help Desk complete the Certification Test Kit task, the file and label certification statuses changes from “N/A” to “Incomplete.”
- Once the Certification Test Kit task is complete, the external user can change the “Incomplete” status of the file and label certifications to “Submitted.” After the file and label certification have been submitted, the Help Desk is responsible for rejecting or approving the certifications. The Help Desk updates the status to “Pending” after receiving the files from the external user.
- If the Help Desk rejects the certification submitted, the external user will see the status of “Rejected” on the Manage Shipping Locations page for both file and label certification. The external user can re-submit certification by selecting “Re-submitted” from the drop down menus. Upon re-submission, the Help Desk can either reject or approve the file and label certification.
- If the Help Desk approves the certification submitted, the external user will see the status of “Complete” on the Manage Shipping Locations page for both file and label certification. Completion of the file and label certification for a shipping location effectively adds that location to the program.

14.5. Post-Enrollment Functionality

After enrollment into a program, the user can search for and add client locations to the program. As is the case prior to successful enrollment, neither the user nor the Help Desk can remove a client location from a program once it has been added.

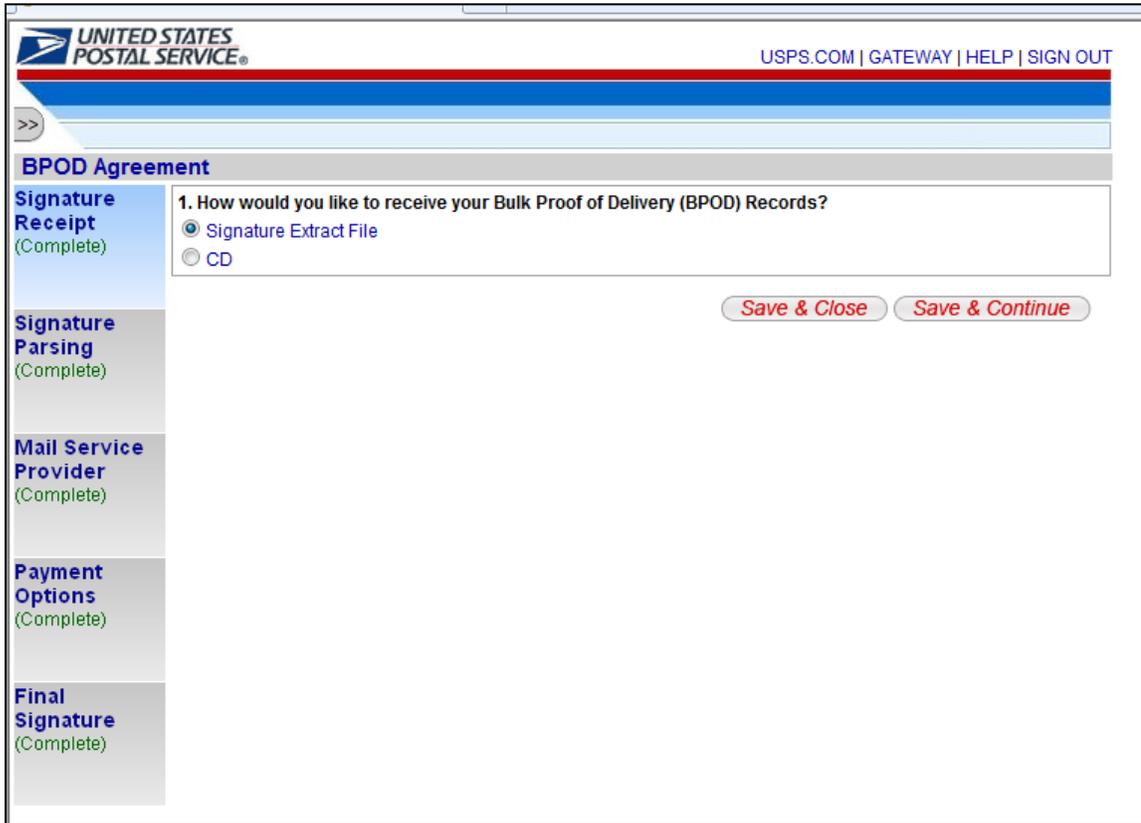
14.6. Pre-Prod Differences

The Manage Clients tab Pre-Prod functionality has the “Create MID” and “Add Location” functionality disabled like the Manage Shipping Locations tab. The “Request MID” and “Add Locations” buttons are removed in Pre-Prod.

15. BPOD Agreement

15.1. General Purpose

The BPOD Agreement task is a required step in the enrollment process for Bulk Proof of Delivery.



The screenshot shows the USPS BPOD Agreement web form. At the top left is the USPS logo and "UNITED STATES POSTAL SERVICE®". At the top right are links for "USPS.COM | GATEWAY | HELP | SIGN OUT". Below the header is a navigation bar with a double arrow icon. The main content area is titled "BPOD Agreement". On the left is a vertical sidebar with five items, each with a blue header and green text indicating completion: "Signature Receipt (Complete)", "Signature Parsing (Complete)", "Mail Service Provider (Complete)", "Payment Options (Complete)", and "Final Signature (Complete)". The main content area contains a question: "1. How would you like to receive your Bulk Proof of Delivery (BPOD) Records?". There are two radio button options: "Signature Extract File" (selected) and "CD". At the bottom right of the form are two buttons: "Save & Close" and "Save & Continue".

Figure 15.1 - BPOD Agreement

15.2. Business Rules

15.2.1. Availability

- The BPOD Agreement is available if the user is enrolling in BPOD. It is not available if the user is enrolling in any other program.

15.2.2. Required v. Optional Components

Each question displayed in the BPOD Agreement must be answered and saved in order for the task status to change to "Complete".

15.3. Page Features

15.3.1. Functionality

- Save & Continue button: Users can save their answers and continue to the next incomplete question.
- Save & Close button: Users can save their answers and return to the Program Summary page.
- Navigation: The user may navigate between questions by selecting the appropriate questions tab in the agreement task.

15.3.2. Exceptions/Special Scenarios

If the user attempts to navigate away from a question before saving their answer, a pop-up window displays informing the user if they would like to save their answer before leaving the questionnaire.

15.4. Help Desk Dependencies

15.4.1. Help Desk view and edit capabilities

The Help Desk can view and edit specific questions in a user's BPOD information via the BPOD tab on the MID Certification task.

15.5. Post-Enrollment Functionality

Once the user has successfully enrolled in a Shipping Service, the user will not be allowed to modify their answers in the BPOD Agreement. All their saved answers will be locked in and the radio buttons for each question will be disabled. The user can request changes to specific questions through the Help Desk.

15.6. Pre-Prod Differences

No change in functionality in Pre-Prod.

16. Transition Locations

16.1. General Purpose

The Transition Locations task is a required step in the enrollment process for Transition to IMpb. This task allows the customer to opt to transition their MIDs with legacy certification types to IMpb (Intelligent Mail package barcodes) certification types.

UNITED STATES POSTAL SERVICE® USPS.COM | GATEWAY | HELP | SIGN OUT

>>

Transition to IMpb [Back to Enrollment Home](#)

Program Summary
In order to transition to an IMpb file for the MIDs in the table below, click the Transition to IMpb button. Transitioned MIDs will require certification.

Showing 1 - 3 of 3

CRID	Program	MID	6-digit MID	Transition to IMpb	Certifications
700210	Parcel Return Service (PRS)	194235714	-	Complete	Certifications
700210	Tracking Only	869184980	-	Pending	Certifications
700210	Electronic Verification System (eVS)	900000243	-	Pending	Certifications

[Transition to IMpb](#)

Transition Locations
Incomplete

Profile Updates
Complete

Figure 16.1 - Transition Locations task

16.2. Business Rules

16.2.1. Availability

The Transition Locations task is available within the Transition to IMpb program, whenever the Transition to IMpb program is available: when a customer has at least one MID with a legacy certification type.

16.2.2. Required v. Optional Components

The task is required for the Transition to IMpb program.

16.3. Page Features

16.3.1. Functionality

- Data table: The table displays Master MIDs for each program where the Master MID or any child MID has a legacy Certification type. The “Transition Status” column will display a “-“before the transition process has begun. Once the process is started, the status will be “Pending” until all MIDs are certified, at which time the status is “Complete”.
- Transition button: Allows the customer to opt to transition their MIDs.

16.3.2. Exceptions/Special Scenarios

If the user has already opted to transition their MIDs for one program to IMpb, and they then receive MID(s) for another program, they will need to click the Transition Locations button again to transition the new MIDs.

16.4. Help Desk Dependencies

16.4.1. Help Desk view and edit capabilities

The Help Desk is able to do the same process for transitioning MIDs that the customer is able to do via the View/Edit Customer screen and the Transition Locations task.

16.5. Post-Enrollment Functionality

N/A

16.6. Pre-Prod Differences

No change in functionality for Pre-Prod.

17. Update Profile

17.1. General Purpose

The Update Profile task is a required step in the enrollment process for Transition to IMpb. This task allows the customer to change their My Profile Survey answers for Mail Classes and Additional Services. These questions will appear on the Update Profile page and save to the My Profile Survey.

Figure 17.1 - Profile Updates task

17.2. Business Rules

17.2.1. Availability

The Update Profile task is available within the Transition to IMpb program, whenever the Transition to IMpb program is available: when a customer has at least one MID with a legacy certification type.

17.2.2. Required v. Optional Components

The task is required for the Transition to IMpb program.

17.3. Page Features

17.3.1. Functionality

Save & Continue button: Users can save their answers and continue to the Program Summary page.

17.3.2. Exceptions/Special Scenarios

If the answers the user select makes additional questions necessary, these questions will display on the page and the user must answer these before completing the task.

17.4. Help Desk Dependencies

17.4.1. Help Desk view and edit capabilities

The Help Desk is able to view the My Profile Survey answers on the “Survey Results”.

17.5. Post-Enrollment Functionality

N/A

17.6. Pre-Prod Differences

No change in functionality in Pre-Prod.

18. PMEM Contact Task

18.1. General Purpose

The PMEM Contact Task is specific to the program and serves an electronic way to submit information contained in page 4 of the PS 5550 form.

The screenshot shows the USPS website interface for the PMEM Contact Task. At the top left is the United States Postal Service logo, and at the top right are links for USPS.COM, GATEWAY, HELP, and SIGN OUT. A navigation bar on the left contains five tabs: 'Company Contact Information' (Incomplete), 'Post Office Contact' (Incomplete), 'District Business Mail Entry Contact' (Incomplete), 'Customer Relations Contact' (Incomplete), and 'USPS Sales Contact' (Optional). The main content area is titled 'Company Contact Information' and contains the following fields: Company Name (*), Address Line 1 (*), Address Line 2, City (*), State (*, dropdown menu with '-- Please Select a State --'), ZIP Code (*), Phone Number (*), Phone Number Ext., Email (*), EMCA Number (*), and Monthly Projected Volume (*). A note below the fields states 'Required fields are marked with *'. At the bottom of the form are two buttons: 'Save & Continue' and 'Save & Close'.

Figure 18.1 – PMEM Contact Task

18.2. Business Rules

18.2.1. Availability

The PMEM Contact Task becomes available upon beginning enrollment.

18.2.2. Required

This task is required to complete PMEM enrollment.

18.3. Page Features

18.3.1. Functionality

The page displays 5 tabs containing the tabs listed below. Each tab contains the following fields: Name, Address 1, Address 2, City, State, ZIP Code, Phone Number, Phone Number Ext, and Email.

- Company Contact (**Required**)

Additional Fields:

- USPSCA Number
 - This field is required if an USPSCA number does for the CRID does not currently exist in Program Registration.
- Monthly Project Volume
 - The value for this data is emailed to a USPS representative who collects this information.
- Post Office Contact (**Required**)
- District Business Mail Entry Contact (**Required**)
- Customer Relations Contact (**Required**)
- USPS Sales Contact (**Optional**)

18.4. Help Desk Dependencies

The PMEM Contact Task is available for the Help Desk to modify or enter PMEM contact information. It can be modified by the Help Desk in two places, listed below.

18.4.1. MID Certification Task - PMEM Contact Information tab

For each PMEM MID Certification task, there exists a PMEM Contact Information Tab. The tab contains the same fields as listed in 9.3.1. Any changes made in the MID Certification Task only apply to the MID.

18.4.2. PMEM Contact Task – Stand alone

In addition to the MID Certification Task PMEM Contact tab, there is also a standalone PMEM Contact Task available to the Help Desk. Any changes made to the PMEM Contact Task will apply to all of the MIDs linked to the customer's PMEM program.

**The PMEM Contact data does not get sent to external systems.*

18.5. Post-Enrollment Functionality

N/A

18.6. Pre-Prod Differences

No change in functionality in Pre-Prod.

19. One-Click Enrollment

19.1. General Purpose

“One-Click Enrollment” is a simplified sign-up process that assigns default settings to an eligible customer’s My Profile Survey and Certification Questionnaire and uses their primary contact information as the technical contact information. When the customer chooses to enroll in a program that is one-click eligible, the Survey, Questionnaire, and Alternate Contact Information tasks are already complete upon entry into Program Registration.

Upon accessing a one-click enrollment program for the first time, the customer will be directed to the One-Click Confirmation page, which allows him or her to review the defaulted settings.

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>>

Congratulations, you are now enrolled in Electronic Verification System (eVS).

As part of your enrollment in this program, you are able to take advantage of many service options offered by USPS.

The tables below will provide you with more information.

Your Profile	
Customer type:	• Other
Mail type:	• Letters/Postcards/Flats • Domestic Packages
Domestic mail classes:	• First-Class Mail • Priority Mail
Priority Mail Open & Distribute (PMOD):	• No
Services:	• Delivery Confirmation • Signature Confirmation
Bulk Proof of Delivery (BPOD) service:	• No
Payment method:	• Permit Imprints
eVS:	• Yes
Edit Profile	

Certification Questionnaire	
Electronic file transmission:	• Yes
Transmission method:	• Secured File Transfer - AS2
Barcoded label generation method:	• Printing Your Own Labels
Software vendor:	• No
File format:	• Electronic File Version 1.6 - EDI Transaction 215
Tracking and/or postage information method:	• Secured File Transfer - AS2

Figure 19.1 – One-Click Confirmation Page

Now, users can download Client Application directly from the enrollment screen

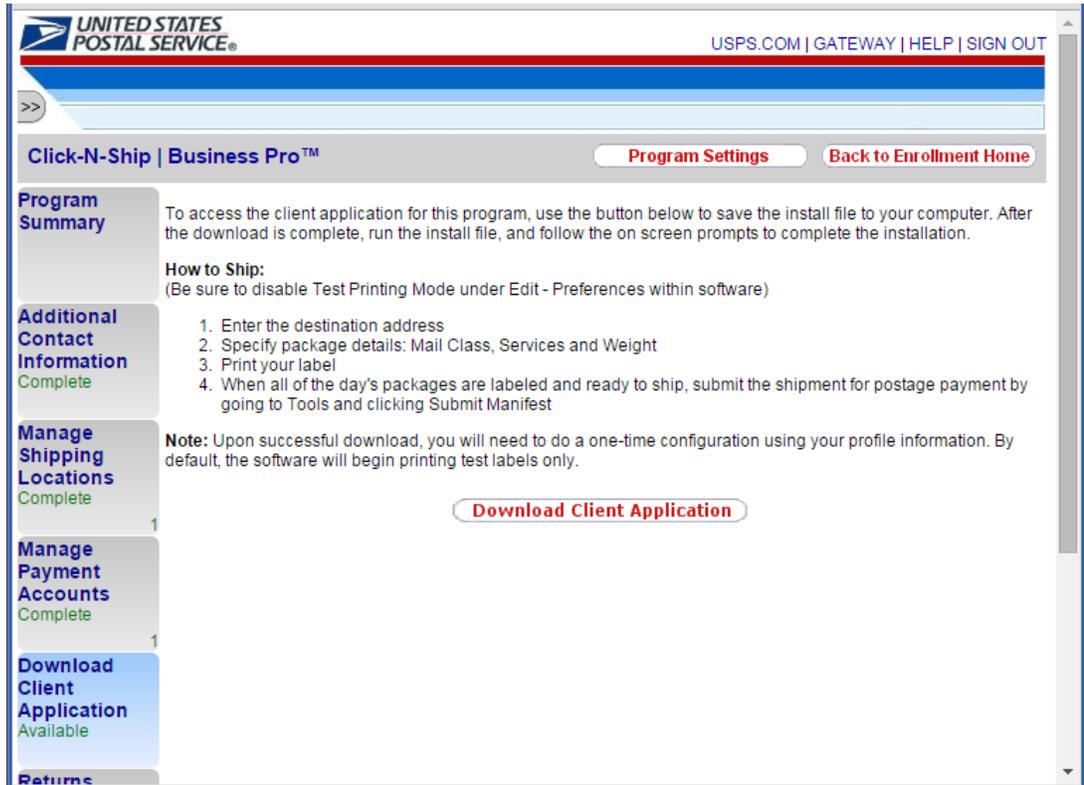


Figure 19.2 – CNSBPro download Client Application page

19.2. Business Rules

19.2.1. Availability

- One-Click Enrollment is only available for new customers (i.e. those with incomplete My Profile Surveys)
- One-Click Enrollment is available only for Click-N-Ship Business Pro (CNS BPro) and eVS as of June 2014.
- There are two ways to access one-click enrollment:
 - Direct link: To enroll in a one-click program, the customer may be able to click the “Go To Service” link on the BCG for CNS BPro or eVS. If one-click is enabled and the direct link is configured to point to Program Registration the customer will be automatically enrolled through the Certification Questionnaire step.

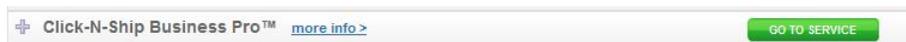


Figure 19.2: Direct link to a one-click program

- One-Click Enrollment Landing Page: Customers may also enroll in a program using the one-click method by selecting the one-click enabled program from the dropdown menu on the One-Click Enrollment Landing Page. Selecting a non-one click program or the “I don’t know” button will take the user directly to the My Profile Survey or the Enrollment Homepage, respectively.

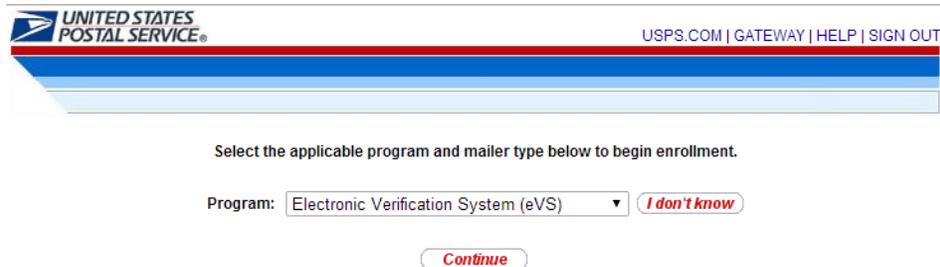


Figure 19.3: One-click landing page

19.2.2. Required v. Optional Components

- CNS BPro customers are required to use one-click enrollment.
- eVS customers can enroll using the one-click method or via the standard enrollment process.

19.3. Page Features

19.3.1. Functionality

- One-Click Landing Page
 - Program Dropdown: Users can select which program they want to enroll in, if known.
 - Continue button: Users can submit their program selection.
 - I don't know button: Users can bypass the program selection option if they are unsure of what they want to enroll in or what they are eligible to enroll in.
- One-Click Confirmation Page
 - Edit Profile button: Direct link to the My Profile Survey so that customers can update their profile information.
 - Edit Questionnaire button: Direct link to the Certification Questionnaire so that customers can update their profile information.
 - Continue: Users can continue into Program Registration without making any changes.

19.3.2. Exceptions/Special Scenarios

- Users will be able to edit their profiles if any of the default settings do not apply to them. The only exception to this is CNS BPro, where customers are not allowed to update their profiles.
- The one-click enrollment process for CNS BPro also includes auto-request and auto-certification of a MID and auto-creation of a new permit specifically for CNS BPro use.

19.4. Help Desk Dependencies

19.4.1. Help Desk view and edit capabilities

The Help Desk is able to modify the default settings for each program's My Profile Survey and Certification Questionnaire. The updated defaults will apply to any future customers who enroll in the program via the one-click process.

19.5. Post-Enrollment Functionality

N/A

19.6. Pre-Prod Differences

One Click enrollment functions similarly in Pre-Prod. As mentioned in section 3, the "Online Enrollment" link from the Production "Pre-Prod Environment" tab will redirect a user to the Pre-Prod One Click Landing page. The Pre-Prod One-Click Landing page functions the same as the Production One Click Landing page.

20. Returns Account

20.1. General Purpose

The purpose of the Returns Account page is to allow a user to enroll in SBP Returns with his/hers eVS, CNSB Pro, and PC Postage.

Additionally, customers can use the Returns Accounts page in order to create new MR permits and/or CAPS accounts, which may be required for participation in those services.

20.2. Business Rules

20.2.1. Availability

- The task is available for CNSB Pro and PC Postage after the Certification Questionnaire is complete
- The task is available for eVS after the Certification Questionnaire is complete and the user has answered “USPS Returns Packages” to the “What type of mail do you want to ship” question in the My Profile Survey

20.2.2. Required v. Optional Components

The task is optional for all programs/services for which it is available.

20.3. Page Features

20.3.1. Functionality for eVS, CNSBPro and PC Postage

- RadioButtons: Allow the user to select a permit.
- Link button: Allows the user to link selected permit to program.
- Unlink button: Allows the user to unlink selected permit from program.
- Filter button: Filters results based on filter textbox and category (CRID, Permit Account Number, Permit Number, Permit Type, Status)
- Sorting: User can sort the table by any of the columns. The first time the column header is selected, the results are sorted alphanumerically. The next time the header is selected, the results are sorted reverse alphanumerically.
- Pagination: The page displays the number of results being displayed in the format ‘Showing 1-20 of 45’. The user is able to select a different amount of records to display by selecting 20, 40, 60, 80, or 100 in the drop-down menu. The <Previous and Next> links appear when additional pages of records exist.
- Table display: The table will display the Permit number, the CRID associated to the permit, the link status (Linked or Not Linked), the type of permit, the ZIP/Postal Code of the permit, and the CAPS account associated with the permit.

- **Create Permit:** The “Create Permit” button allows customers to create a new permit automatically via an electronic interface with *PostalOne!*
- **Create CAPS Account:** The Create CAPS Account functionality allows the user to have the CAPS Admin group link existing CAPS accounts to their permit or create a new CAPS account electronically through ACH Online, another USPS application that is linked directly from Program Registration. After creating a new CAPS account in ACH Online, users are directed back to Program Registration where their new account information is displayed.

The screenshot shows the USPS Electronic Verification System (eVS) interface. At the top, the USPS logo and navigation links (USPS.COM | GATEWAY | HELP | SIGN OUT) are visible. The main heading is "Electronic Verification System (eVS)" with a "Back to Enrollment Home" link. A sidebar on the left contains navigation options: "Program Summary" (selected), "Additional Contact Information Complete", "Certification Questionnaire Complete", "Manage Shipping Locations Complete", "Manage Payment Accounts Incomplete", and "Returns Account Optional".

The main content area includes a "Program Summary" section with "Link" and "Unlink" buttons. Below this is a "Show All" dropdown menu set to "--Select Category--" and a "Filter Permits:" input field with a "Filter" button. A "Per Page:" dropdown is set to "20".

A table displays permit information, showing 1 - 2 of 2 records:

	CRID ?	Permit Account Number	Permit Type	Permit Number ↕	Permit ZIP	Status
<input checked="" type="radio"/>	805131	None	MR	734438	20260	Not Linked
<input type="radio"/>	805131	None	MR	25171	20260	Not Linked

Below the table, a "Create Permit" button is visible. A note states: "To create a new permit, select the 'Create Permit' button."

The "Returns Account" section contains the following text: "To open a new CAPS account to use for this program, select a Permit from the table above and the option below that describes the CAPS account you want to use for this program."

Two radio button options are provided:

- I have a CAPS account number I would like to use for this program: [input field]
- I need a new CAPS account:

Buttons for "OK" and "Create CAPS Account" are located below the options.

Figure 20.1 – Returns Account

20.4. Help Desk Dependencies

- The Help Desk is able to link and unlink MR payment accounts

20.5. Post-Enrollment Functionality

- MR permits cannot be unlinked from the program after enrollment. However, permits can be linked to the program after enrollment.

20.6. Pre-Prod Differences

The Pre-Production Manage Payment Accounts functionality is similar to Production. Production permits will not be useable in Pre-Prod, but Pre-Prod permits can be created using the same “Create Permit” functionality that exists in Production. New Pre-Prod permits can be linked in the same way permits are linked in Production. One key difference between Pre-Prod and Production is CAPS Accounts cannot be created in Pre-Prod, therefore the “Create CAPS” functionality does not display in Pre-Prod.



You are in the Pre-Production Environment for Mailers

Electronic Verification System (eVS)

[Back to Enrollment Home](#)

Program Summary



Both a permit and CAPS (Centralized Account Payment System) account are required for participation in the Electronic Verification System (eVS). Packages shipped under this program will bear a permit imprint indicia to indicate that postage has been paid. A permit is required to use this type of postage evidencing.

Payment for postage will be deducted at the time of mailing from your CAPS account. CAPS provides business mailers a centralized, convenient, and cost-effective way to pay for USPS products and services. USPS currently supports online creation of ACH Debit type CAPS accounts. ?

Additional Contact Information

Complete

[Link](#) [Unlink](#)

Certification Questionnaire

Complete

Show All --Select Category--

Per Page:

Filter Permits: [Filter](#)

20

Showing 1 - 1 of 1

	CRID ?	Permit Account Number	Permit Type	Permit Number	Permit ZIP	Status
<input checked="" type="radio"/>	805131	None	PI	592671	20260	Not Linked

To create a new permit, select the "Create Permit" button.

[Create Permit](#)

Manage Shipping Locations

Complete

Manage Payment Accounts

Incomplete

Returns Account

Optional

Figure 20.2 – Pre-Prod Returns Accounts

21. Manage API Home Page

21.1. General Purpose

The Manage API Home Page displays a list of USPS Application Programming Interfaces (APIs) for which the customer is able to sign up. The page shows all of the available APIs with corresponding statuses for a user.

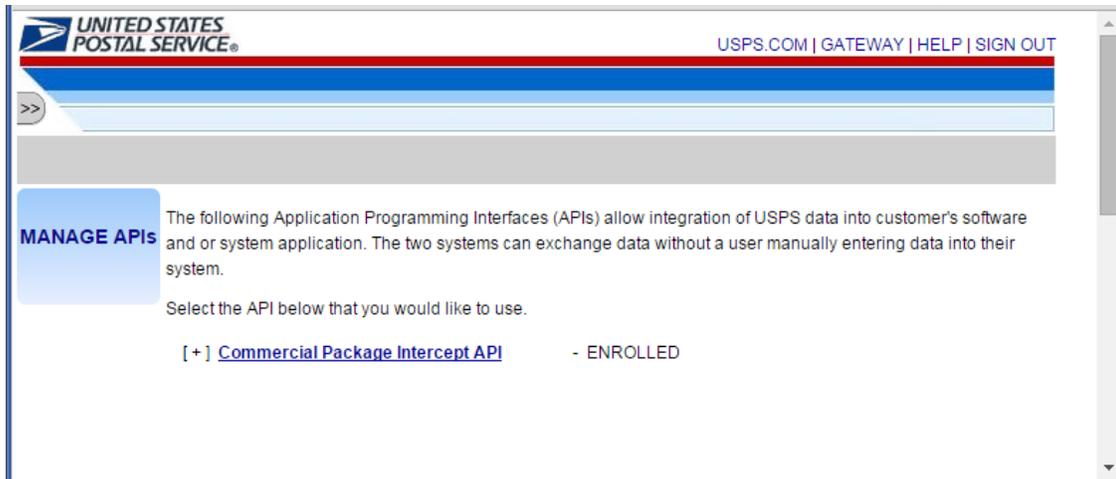


Figure 21.1 – Manage API home page

21.2. Business Rules

21.2.1. Availability

The Manage API Home Page is always displayed upon clicking the “Manage APIs” link from the BCG. Additionally, the user can click the “Return to Enrollment Home” button on any screen to return to the Home Page.

21.2.2. Required v. Optional Components

N/A

21.3. Page Features

21.3.1. Functionality

- Upon first entering Manage APIs, a list of APIs is displayed, with status “AVAILABLE”.
- A “+” symbol next to each API name will expand and display a detailed description of the API.
- Clicking on the API name link will take the user to the API Summary Screen and display the sign up steps.

21.4. Help Desk Dependencies

N/A

21.5. Post-Enrollment Functionality

Same as pre-enrollment.

21.6. Pre-Prod Differences

NA

22. API Summary

22.1. General Purpose

API Summary page provides users with a description of the API, API Enrollment status and Enrollment steps. The API Summary page is the hub of the enrollment process, providing links to other important pages and displaying the current status of each enrollment task.

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Commercial Package Intercept API Back to Enrollment Home

Program Summary

Commercial Package Intercept API
Overview
CPI API is an Application Programming Interface (API) that automates USPS Package Intercept requests for PC Postage vendors and commercial customer's in-house systems without accessing the online user interface on BCG.

Select Location
Incomplete

Enrollment Status - In Progress - 0 out of 2 steps completed
Please complete all of the steps below to enroll.

Enrollment Steps (2)

- [+] Select Location - *Incomplete*
- [+] API Manage Payment - Not Available

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Figure 22.1 –API Summary home page – new enrollment

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Commercial Package Intercept API [Back to Enrollment Home](#)

Program Summary

Commercial Package Intercept API Overview
CPI API is an Application Programming Interface (API) that automates USPS Package Intercept requests for PC Postage vendors and commercial customer's in-house systems without accessing the online user interface on BCG.

Select Location Complete

Enrollment Status - Enrolled - 2 out of 2 steps completed
Congratulations! You are enrolled in the API.

Enrollment Steps (2)

- [+] Select Location - Complete
- [+] API Manage Payment - Complete

API Manage Payment Complete

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Figure 22.2 –API Summary home page – Complete enrollment.

22.2. Business Rules

22.2.1. Availability

The Program Summary page is always available.

22.2.2. Required v. Optional Components

NA

22.3. Page Features

22.3.1. Functionality

- Customer Task List: The statuses of the following tasks are links that will navigate the user to pages with matching tab names. The customer is required to complete these tasks to completely enroll.
 - Select Location
 - API Manage Payment

- Clicking on “+” sign will expand and display description of the task.

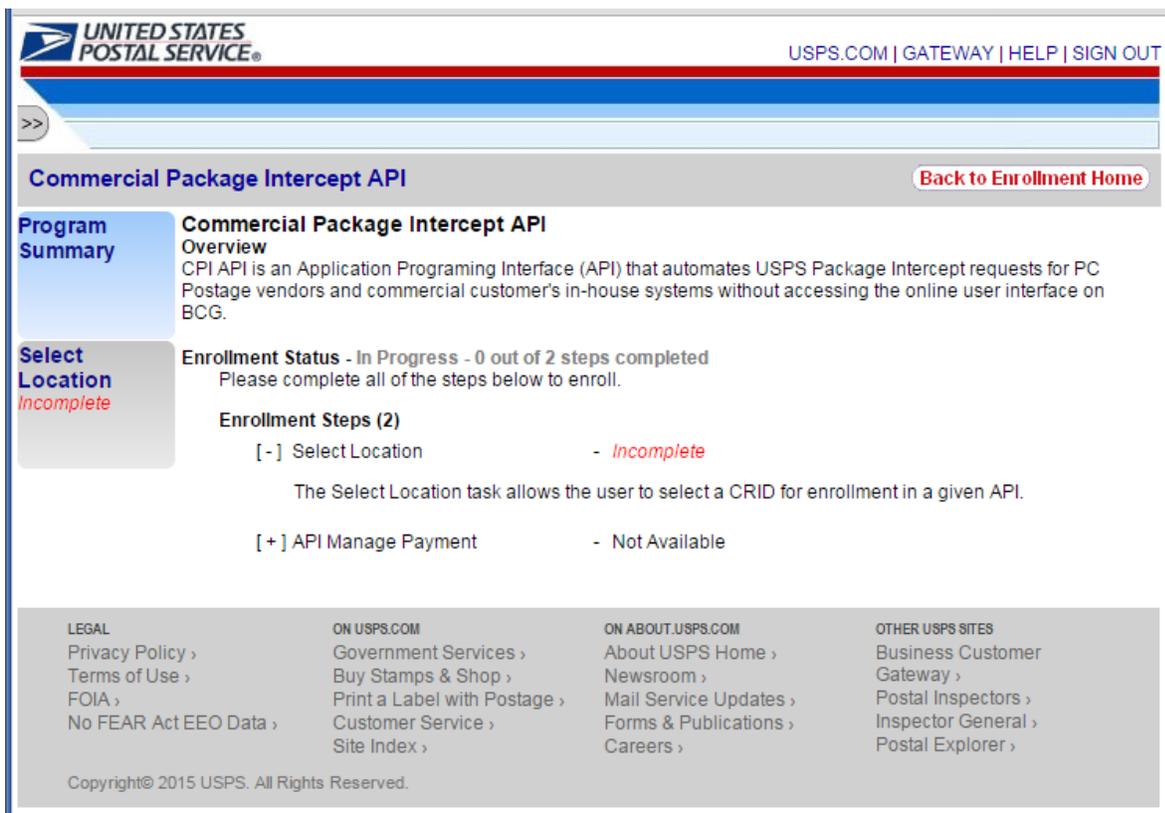


Figure 22.3 –API Summary home page.

22.3.2. Exceptions/Special Scenarios

List of tasks might be different for different APIs. For CPI API there are two tasks: Select Locations and API Manage Payment, which will need to be completed in order to start using the service..

22.4. Help Desk Dependencies

NA

22.5. Post-Enrollment Functionality

User may go back through enrollment steps to review and update all sign up settings.

22.6. Pre-prod Differences

NA

23. Select Locations

23.1. General Purpose

The Select Locations page allows user to select a CRID from a list of all affiliated locations available to use for the API. The user can also add a business location by selecting the 'Add Location' button.

23.2. Business Rules

23.2.1. Availability

The Select Locations page is always accessible when registering for CPI API.

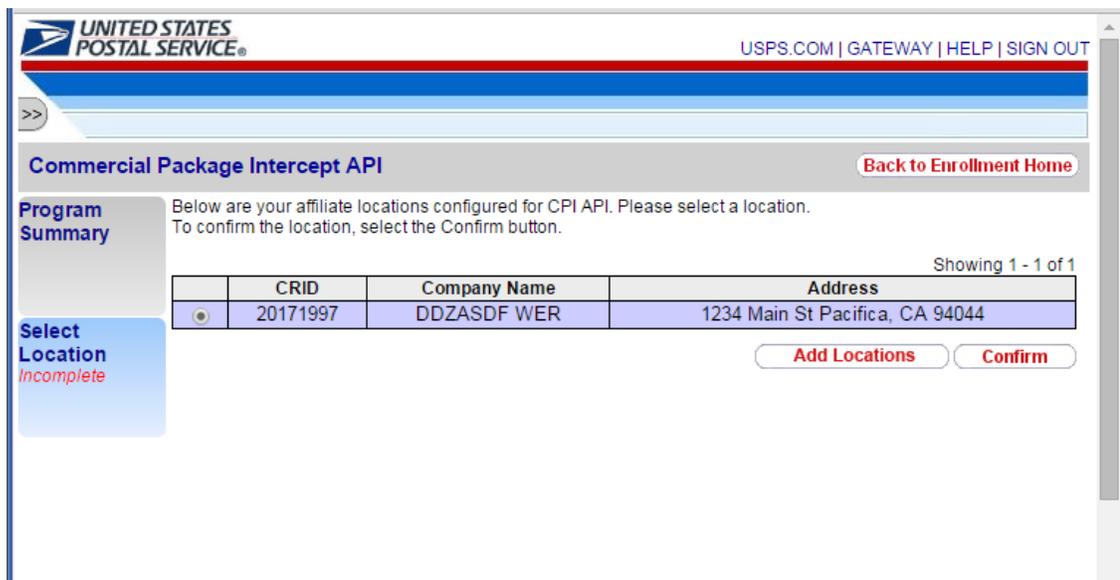
23.2.2. Required Components

In order for the task to be marked as "Complete", the user must have at least one affiliate location with at least one active PI permit.

23.3. Page Features

23.3.1. Functionality

- The data table will display a list CRIDs (affiliated locations) that are available to the user and have at least one active PI permit and CAPs account.
- User must select one location and click "Confirm" button to complete the step.
- User can access BCG site to add additional locations, as needed.



The screenshot shows the USPS Commercial Package Intercept API enrollment page. The page header includes the USPS logo and navigation links: USPS.COM | GATEWAY | HELP | SIGN OUT. The main heading is "Commercial Package Intercept API" with a "Back to Enrollment Home" link. Below the heading, there is a message: "Below are your affiliate locations configured for CPI API. Please select a location. To confirm the location, select the Confirm button." A table displays one location with the following data:

CRID	Company Name	Address
20171997	DDZASDF WER	1234 Main St Pacifica, CA 94044

Below the table are two buttons: "Add Locations" and "Confirm". On the left side, there is a "Program Summary" section and a "Select Location" button with the text "Incomplete".

Figure 23.1 - Select Location - Data table displays – enrollment in progress

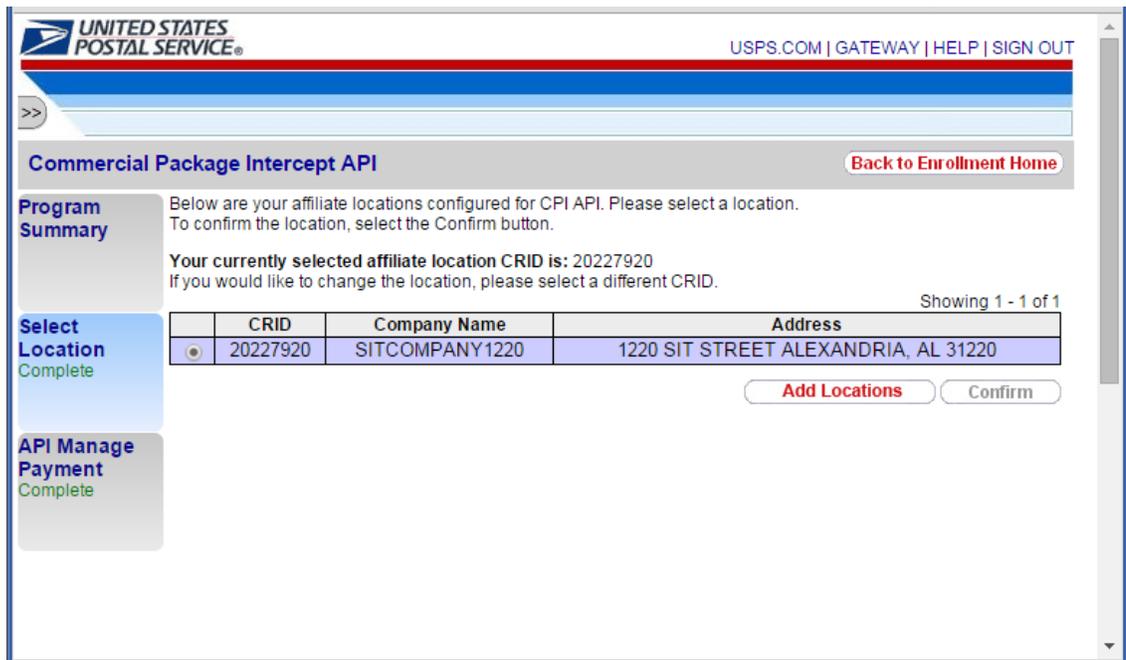


Figure 23.2 - Select Location - Data table displays – review/update completed enrollment

23.3.2. Exceptions/Special Scenarios

- Affiliated Locations without active PI permit will not be displayed in the data table.

23.4. Help Desk Dependencies

NA

23.5. Post-Enrollment Functionality

After enrollment into a CPI API, the user can change and add locations.

When new Location is selected to use API, all API calls with original location will be rejected.

23.6. Pre-Prod Differences

NA

24. API Manage Payment Page

24.1. General Purpose

The API Manage Payment Page will allow the user to select which PI permit / CAPS account to use for CPI API. If the PI Permit / CAPS account are not available they can be requested on this particular page.

24.2. Business Rules

24.2.1. Availability

The API Manage Payment page is accessible after Select Location task is completed.

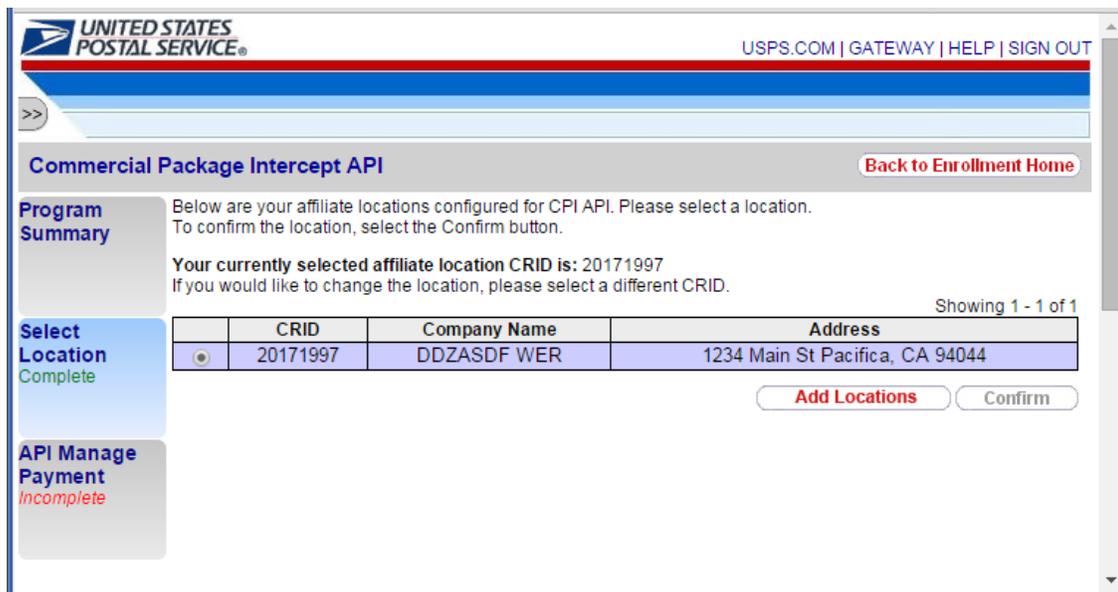


Figure 24.1 – After Completing Select Location Task, API Manage Payment task is displayed.

24.2.2. Required Components

- In order for the task to be marked as "Complete" (Figure 24.4), the user must have at least one affiliate location with at least one active PI permit and CAPS account.

24.3. Page Features

24.3.1. Functionality

- The data table will display a list of active PI permits and CAPS accounts for selected CRID, if available.
 - User must select one PI permit / CAPS account to complete the step (Figure 24.3).
 - User can request to create new Permit by clicking on “Create Permit” button (Figure 24.3).
 - If there is an active PI permit and CAPS account for a CRID, this step gets automatically completed, but user still has an option to create new accounts (Figure 24.3).

The screenshot shows the USPS Commercial Package Intercept API enrollment interface. At the top, the USPS logo and navigation links (USPS.COM | GATEWAY | HELP | SIGN OUT) are visible. The main heading is "Commercial Package Intercept API" with a "Back to Enrollment Home" link. A "Program Summary" section explains that both a PI permit and CAPS account are required. Below this, a "Select Location" section is marked "Complete" and includes filter options for "Show All" and "Value". The "API Manage Payment" section is marked "Incomplete" and contains a "Permit List" table. The table has columns for CRID, Permit Number, Account Number, Permit Type, and Permit ZIP, but it is currently empty, displaying "Nothing found to display." Below the table, instructions and buttons for "Create Permit" and "Create CAPS Account" are provided.

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Commercial Package Intercept API [Back to Enrollment Home](#)

Program Summary
Both a PI permit and CAPS (Centralized Account Payment System) account are required for access to Commercial Package Intercept API.
Permit imprints require a one-time application fee to setup this indicia.

Select Location
Complete

Filter Options
Show All --Select Category--
Value [Filter](#)

API Manage Payment
Incomplete

Permit List
Per Page: 20
Showing 0 - 0 of 0

CRID ?	Permit Number	Account Number	Permit Type	Permit ZIP
Nothing found to display.				

To create a new permit, press the "Create Permit" button.

[Create Permit](#)

To open a new CAPS account, select a Permit from the table above and press the "Create CAPS Account" button.

[Create CAPS Account](#)

Figure 24.2 – no permits /CAPS accounts available.


USPS.COM | GATEWAY | HELP | SIGN OUT

[Back to Enrollment Home](#)

Program Summary

Select Location
Complete

API Manage Payment
Incomplete

Both a PI permit and CAPS (Centralized Account Payment System) account are required for access to Commercial Package Intercept API.

Permit imprints require a one-time application fee to setup this indicia.

Filter Options

Show All ▼

Value [Filter](#)

Permit List

Per Page: ▼
Showing 1 - 1 of 1

	CRID ?	Permit Number	Account Number	Permit Type	Permit ZIP
<input checked="" type="radio"/>	20171997	943	22669676	PI	202600846

To create a new permit, press the "Create Permit" button.

[Create Permit](#)

To open a new CAPS account, select a Permit from the table above and press the "Create CAPS Account" button.

[Create CAPS Account](#)

Figure 24.3 – Screen after user requested to create a permit.

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Commercial Package Intercept API [Back to Enrollment Home](#)

Program Summary

Congratulations! All the requirements for enrollment in this API have been satisfied and your enrollment has been completed.

Select Location
Complete

API Manage Payment
Complete

Both a PI permit and CAPS (Centralized Account Payment System) account are required for access to Commercial Package Intercept API.

Permit imprints require a one-time application fee to setup this indicia.

Filter Options

Show All Filter

Value Filter

Permit List

Per Page: 20
Showing 1 - 2 of 2

	CRID ?	Permit Number	Account Number	Permit Type	Permit ZIP
<input checked="" type="radio"/>	20227920	631	2641587	PI	202600846
<input type="radio"/>	20227920	630	99559 (CAPS)	PI	202600846

To create a new permit, press the "Create Permit" button.

[Create Permit](#)

To open a new CAPS account, select a Permit from the table above and press the "Create CAPS Account" button.

[Create CAPS Account](#)

Figure 24.4 – API Manage Payment is complete.

24.3.2. Exceptions/Special Scenarios

- The user will be directed to the ACH site, when clicking on "Create CAPS account" button.

UNITED STATES POSTAL SERVICE® ACH Online

Create a CAPS Debit Account

The undersigned hereby (1) authorizes the U.S. Postal Service to originate debit and credit entries via the Automated Clearing House to the account indicated below; and (2) authorizes the Depository Financial Institution named below to accept and to debit or credit the amount of such entries to the account from the date of this authorization.

This authorization will remain in effect until written notification of termination has been given by the Customer and that notification has been received by the Manager, CAPS Service Center, U.S. Postal Service. The U.S. Postal Service, at its discretion, may terminate the customer's ability to participate in the Electronic Funds Transfer (EFT) system. Termination will take effect only after all entries originated by the U.S. Postal Service have been honored by the bank.

Authorized Contact Information

CRID *
20227920

Company Name *
SITCOMPANY1220

Address Line 1 *
1220 SIT STREET

Address Line 2

Figure 24.5 – ACH screen to create new CAPS account.

24.4. Help Desk Dependencies

NA

24.5. Post-Enrollment Functionality

After enrollment into a CPI API, the user can change and add locations and permits. When new Location is selected to use API, all API calls with original location will be rejected.

24.6. Pre-Prod Differences

NA

Appendix A: External Error Messages by Page

Page	Error Message	Trigger
Additional Contact Information	Please enter a valid Name.	User clicks Save button and the Name field is blank.
	Please enter a valid Address.	User clicks Save button and the Address 1 field is blank.
	Please enter a phone number in the form (555)555-5555.	User clicks Save button and the Phone field is blank or in an incorrect format.
	Please enter an email address in the form user@domain.com.	User clicks Save button and the Email field is blank or in an incorrect format.
	Please enter a fax number in the form (555)555-5555.	User clicks Save button and the Fax Number field is blank or in an incorrect format.
Manage Shipping Locations	Please enter text and select a filter category.	No text entered in the filter text box or a category is not selected from the filter drop-down menu.
Manage Client Locations	Please enter text and select a filter category.	No text entered in the filter text box or a category is not selected from the filter drop-down menu.
Manage Payment Accounts	Please enter a 6 digit EMCA account number.	User enters non-numeric text or more or less than 6 characters, selects EMCA from the drop down menu and clicks Save.
	Please enter a 3 digit Federal Agency account number.	User enters non-numeric text or more or less than 3 characters, selects EMCA from the drop down menu and clicks Save.
	Please enter text and select a filter category.	No text entered in the filter text box or a category is not selected from the filter drop-down menu.