Program Registration

External Online Enrollment

User Guide

August 4, 2016
Version: 4.0

Table of Contents

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	**Production**: MID Tool generates MID data. Program Registration pulls this data. **Pre-Prod**: Pre-Prod pulls MID information generated from the MID Tool in Production. New MIDs cannot be requested in Pre-Prod.
Customer Registration	**Production**: CRID data is generated in Production. Program Registration pulls this data. **Pre-Prod**: Pre-Prod pulls existing CRID data from the Customer Registration Production environment. New CRIDs are not generated in Pre-Prod.
PostalOne!	**Production**: Program Registration retrieves payment information from PostalOne!, as well as sends customer data to different modules such as eVS and SBP. **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: • 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	**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. **Pre-Prod**: In the Pre-Prod environment, data will not be sent to PTR.
PASS	**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. **Pre-Prod**: In Pre-Prod, this information will not be sent.
WebTools	**Production**: Data is sent to WebTools to support the Click-N-Ship Business Pro™ program. **Pre-Prod**: Data will not be sent to WebTools from Pre-Prod.
ACH	**Production**: This system generates a CAPS account for customers. **Pre-Prod**: ACH does not have its own Pre-Prod environment, so CAPS accounts

	cannot be generated electronically in Pre-Prod.

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.

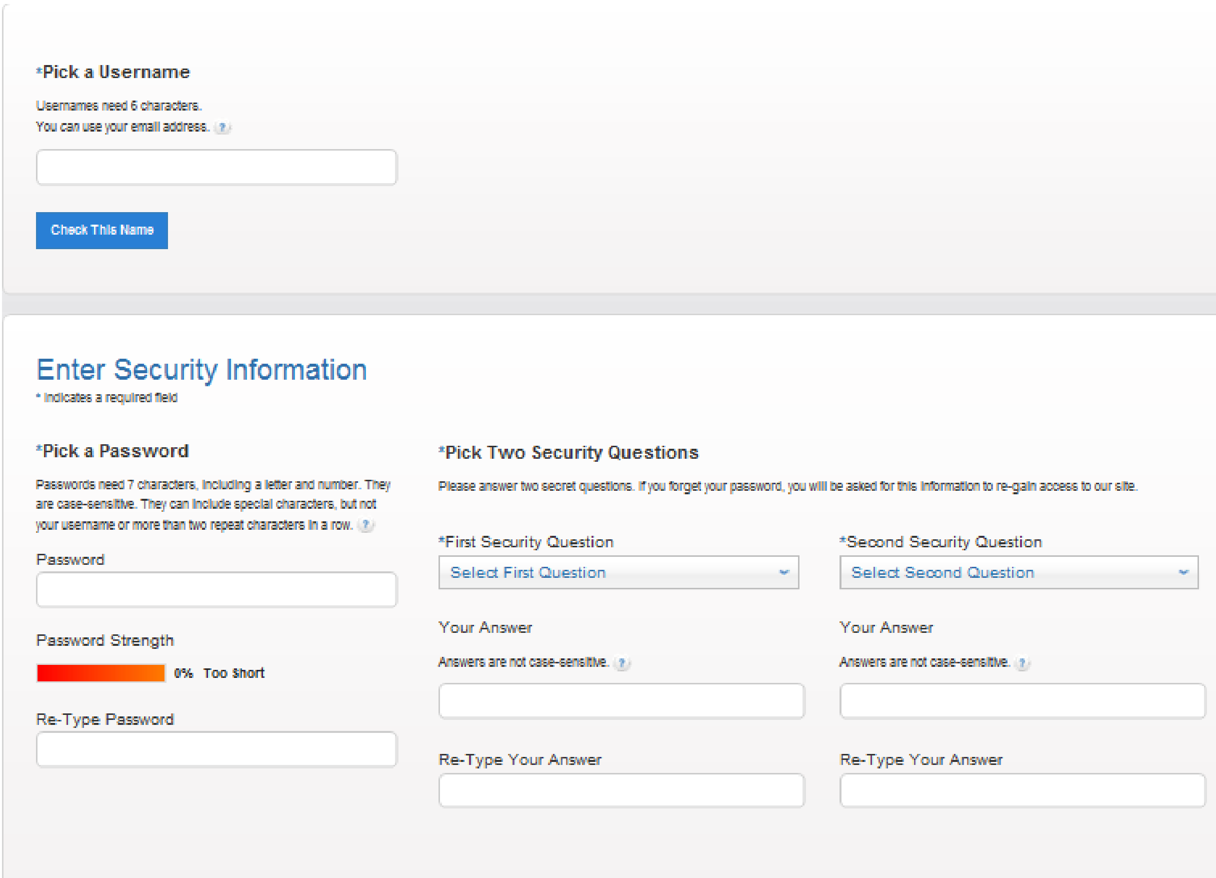


Figure 2.2: Create User Name and Password

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.

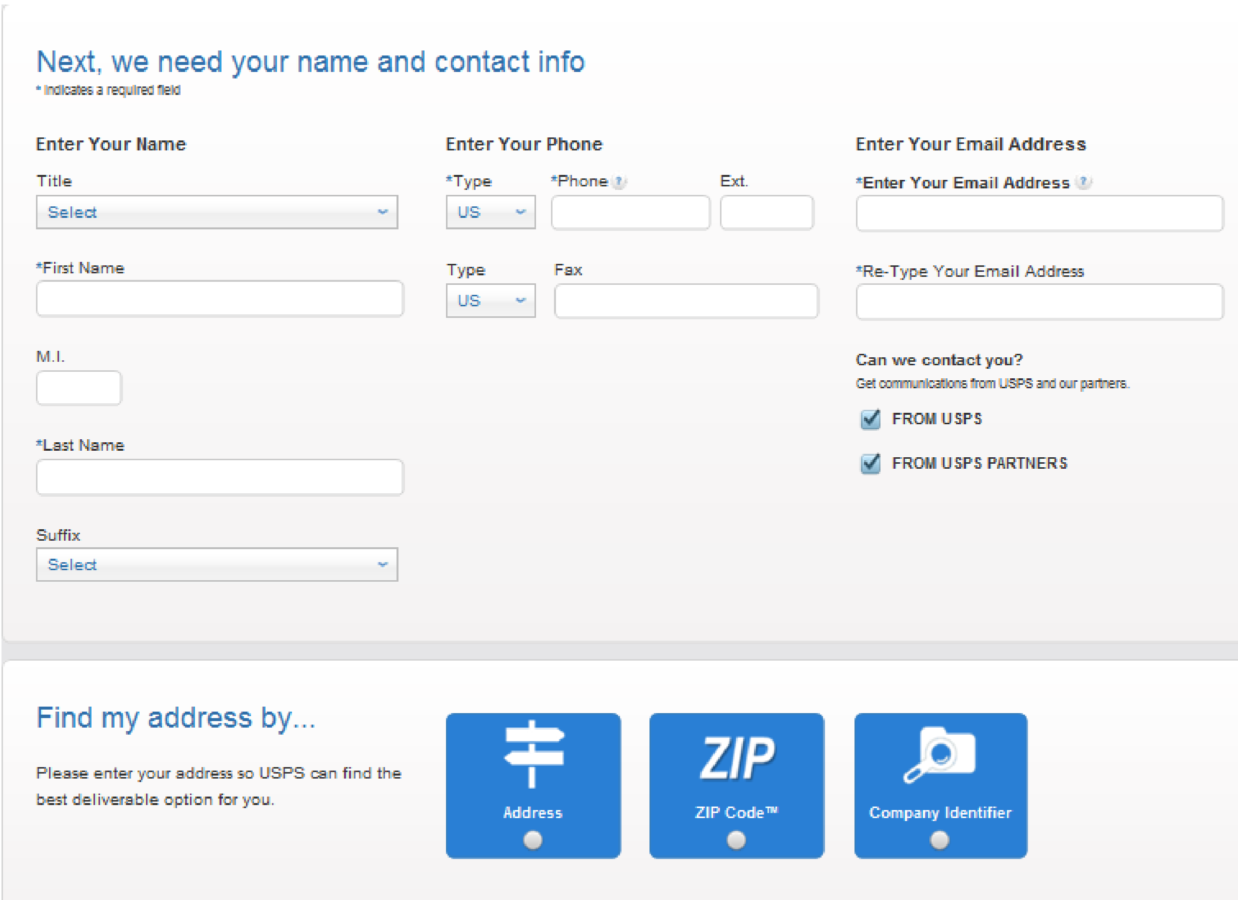


Figure 2.3: Create Account

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.

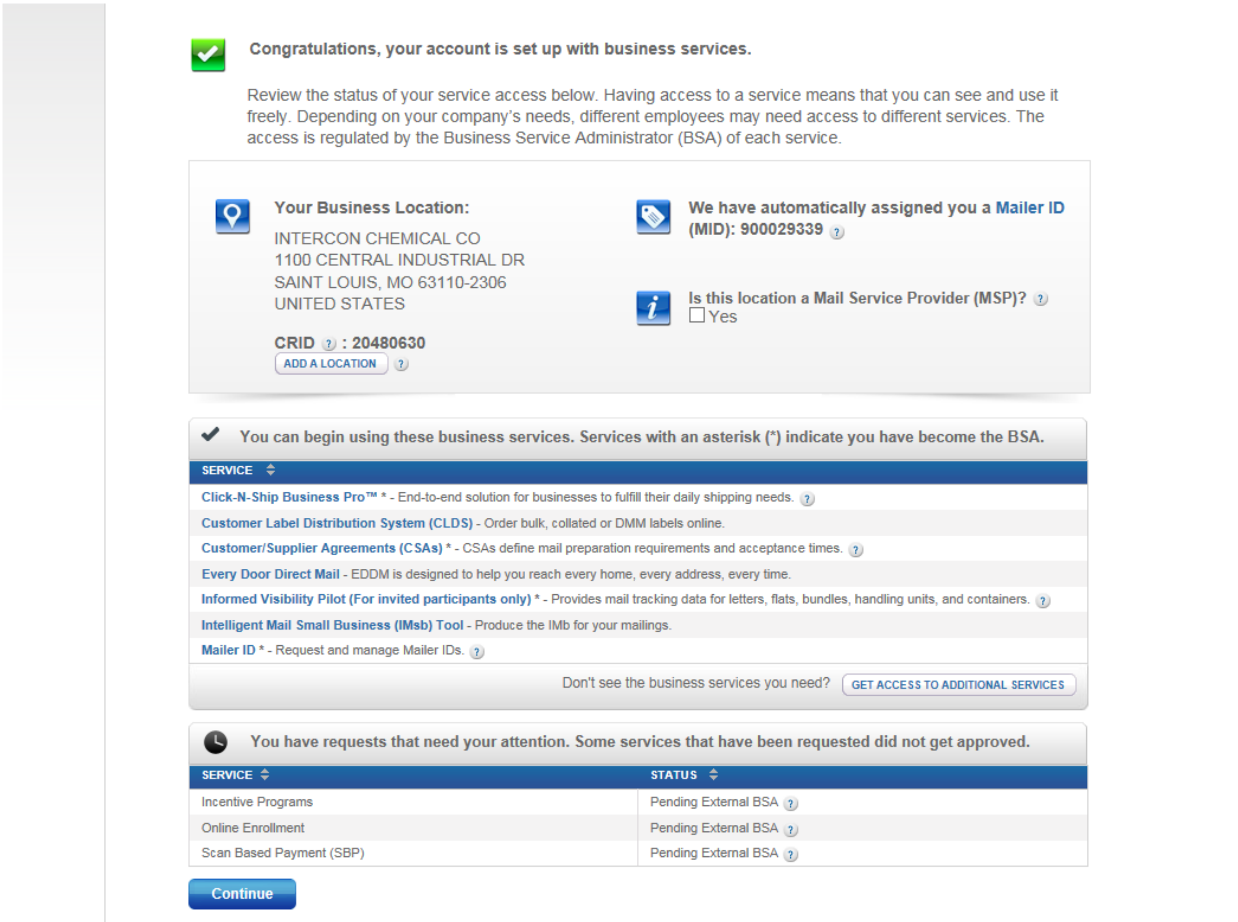
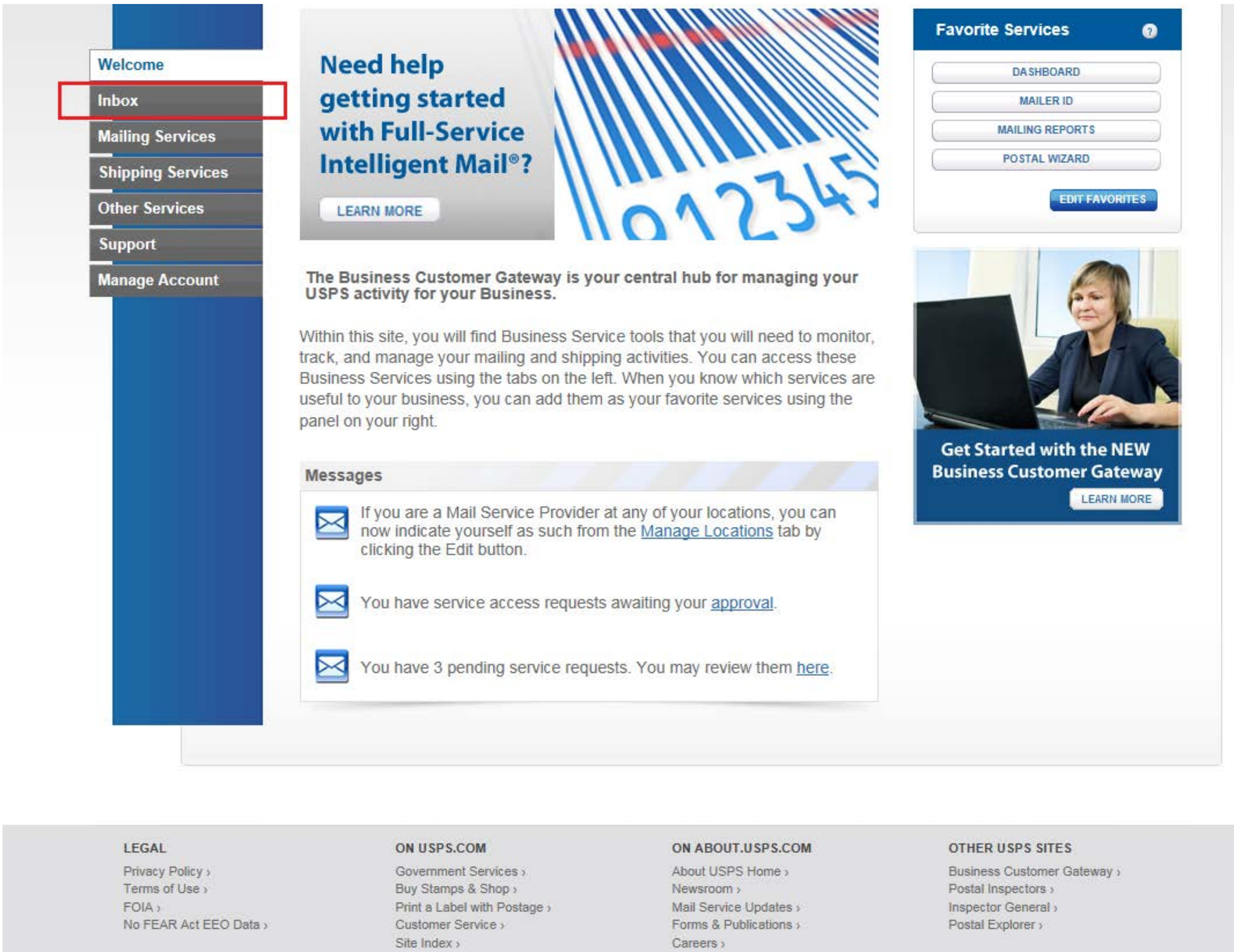
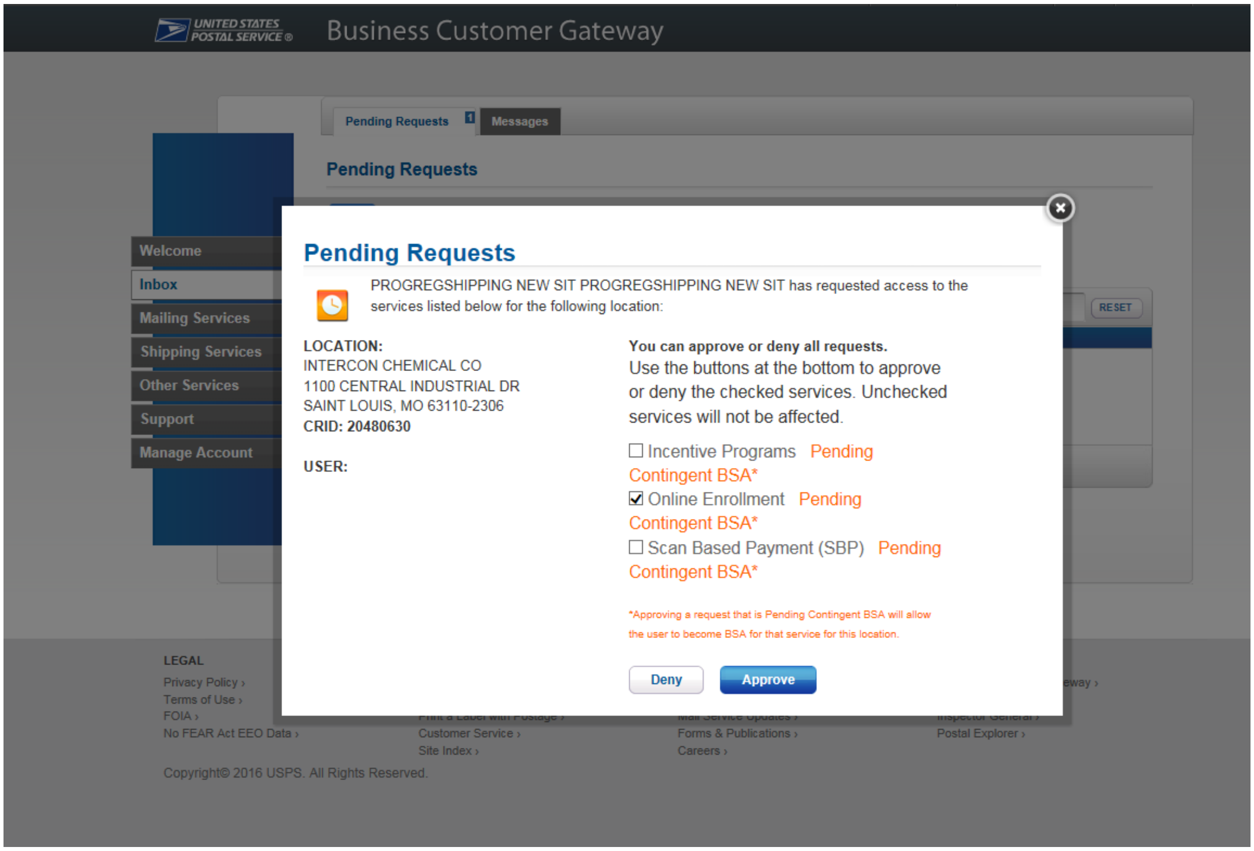


Figure 2.4: List of Services

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



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



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:

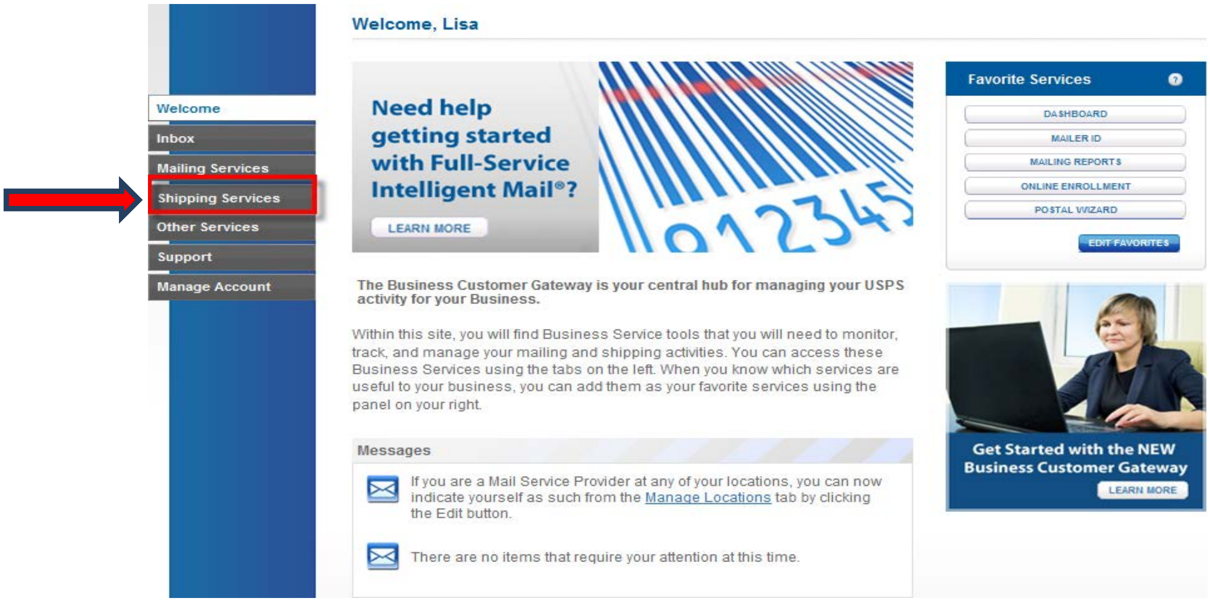
If you are already using the BCG, complete the following steps to enroll for an Online Enrollment Shipping program:

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

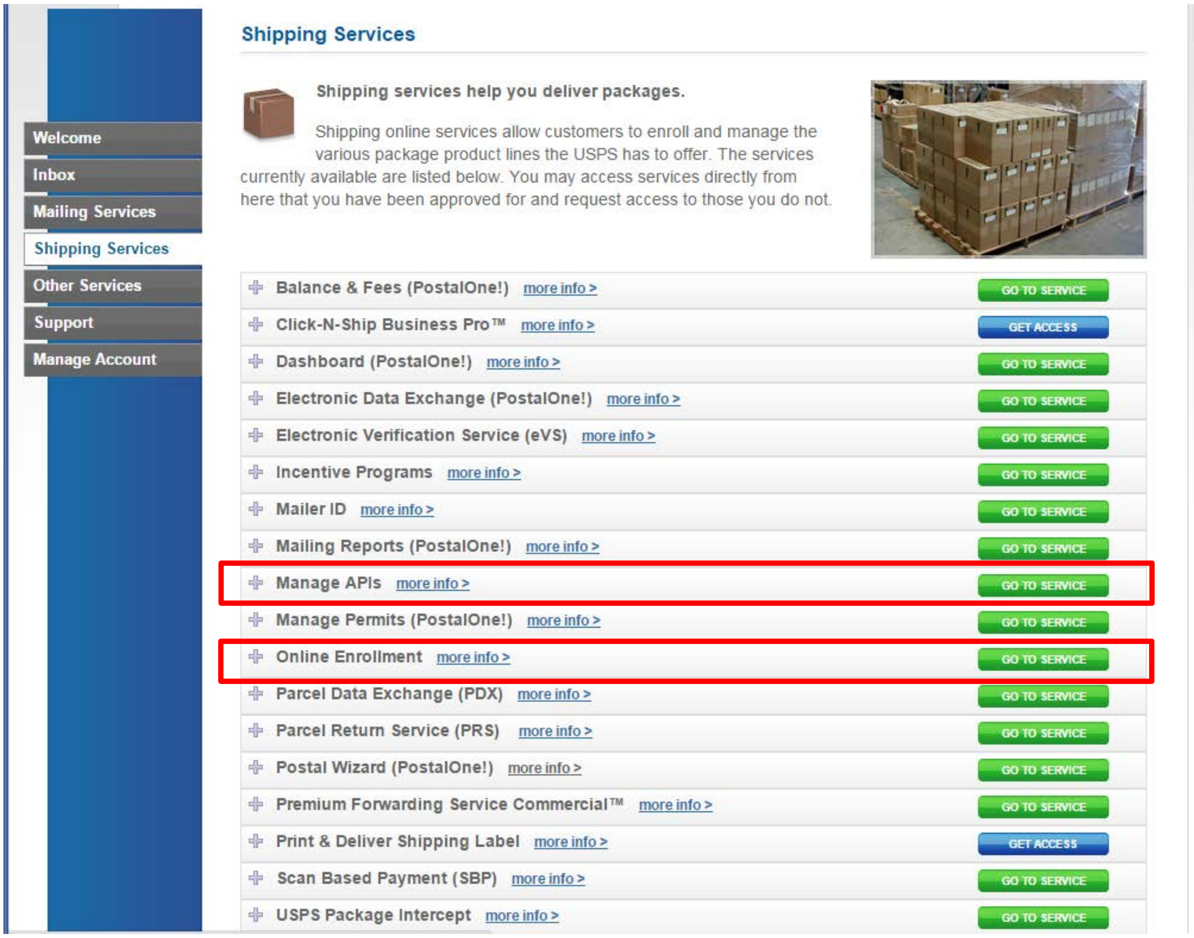
Figure 2.5: Sign In screen

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.

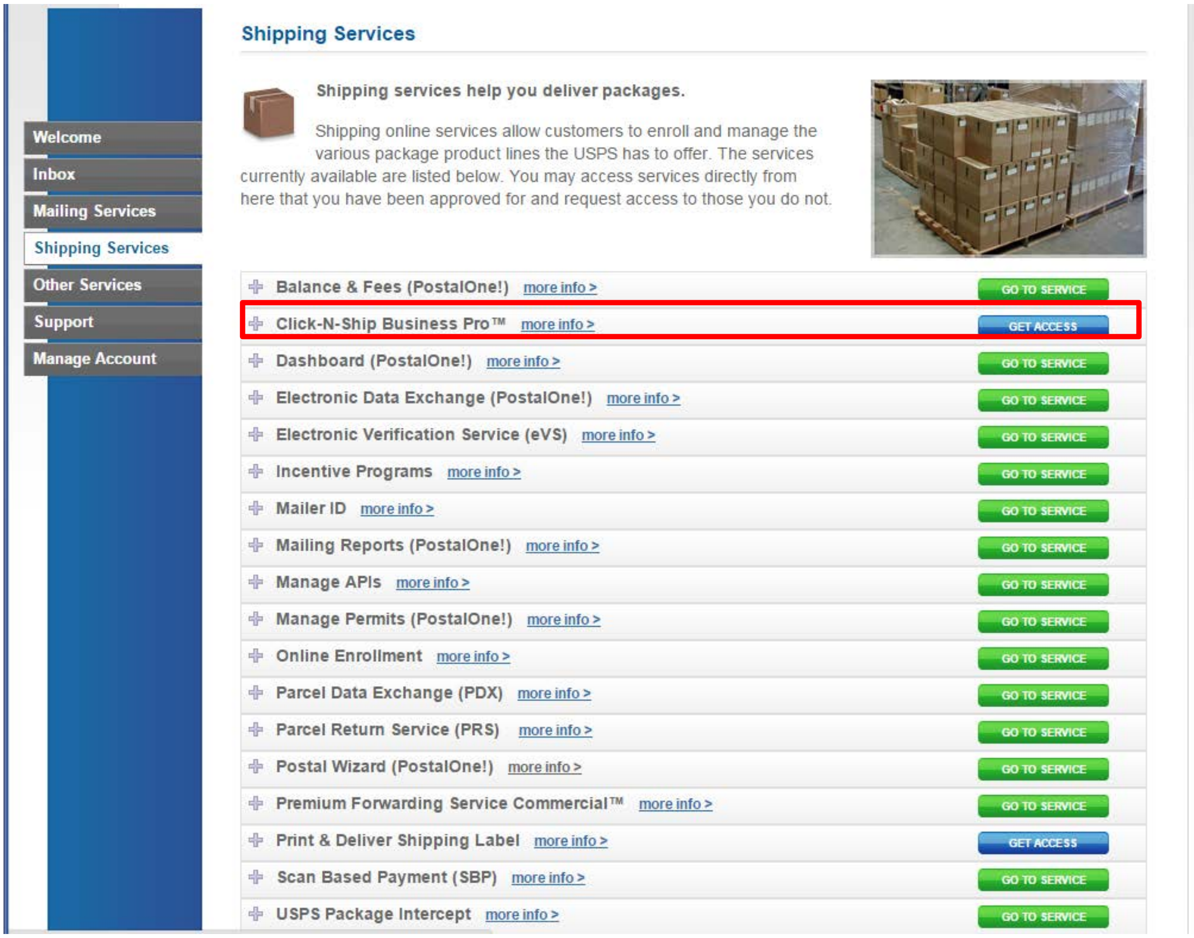


b) Find **Online Enrollment** and **Manage APIs** from the list displayed. You have access to this service if the button to the right says “Go To Service”.



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.



- 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 

    - 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.

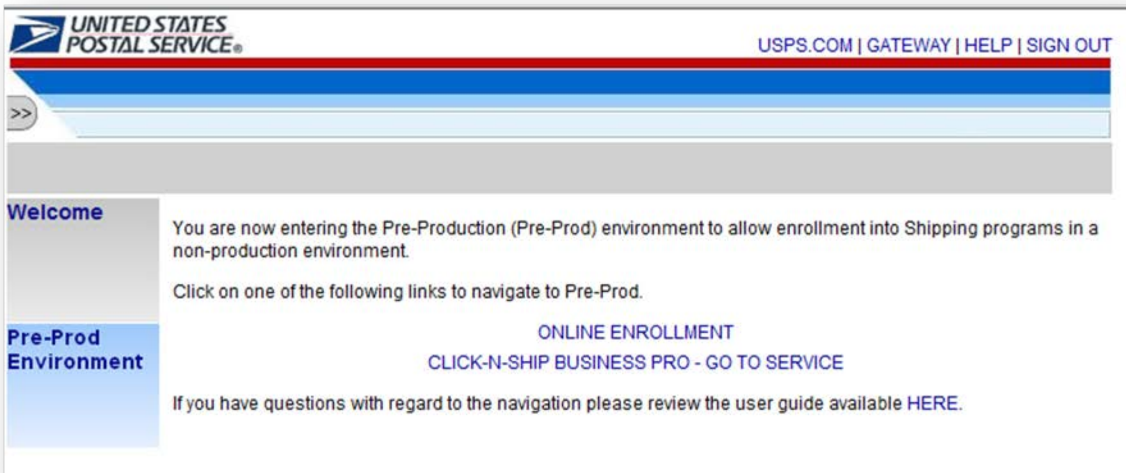


Figure 3.1: Pre-Prod Environment

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.

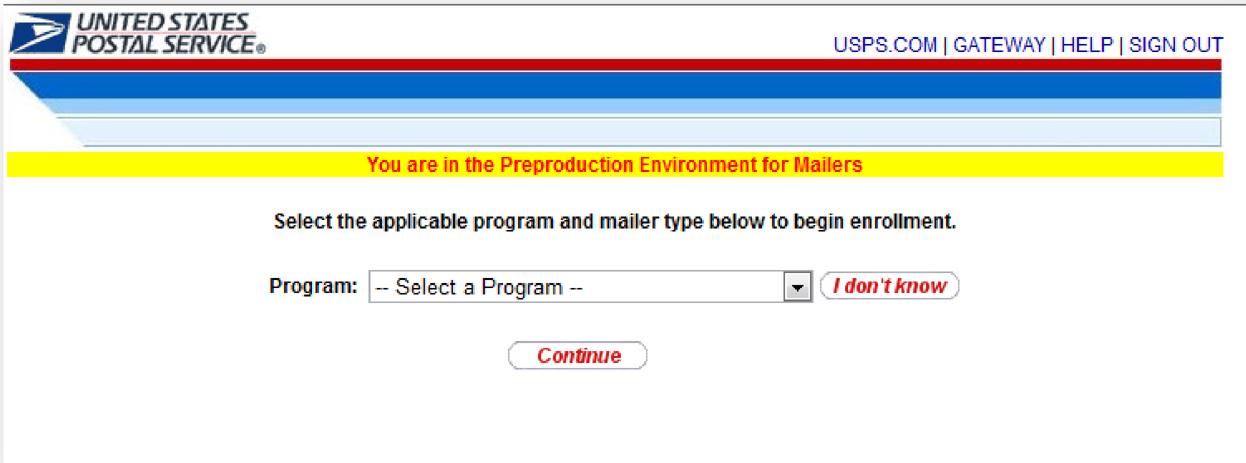


Figure 3.2: Pre-Prod One Click Landing page

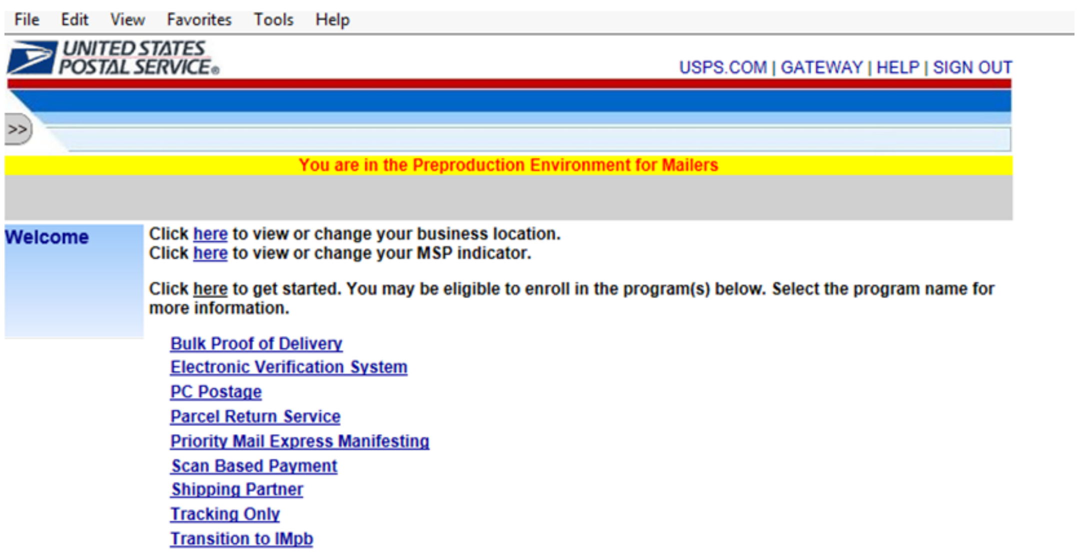


Figure 3.3: Pre-Prod Welcome Page

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.

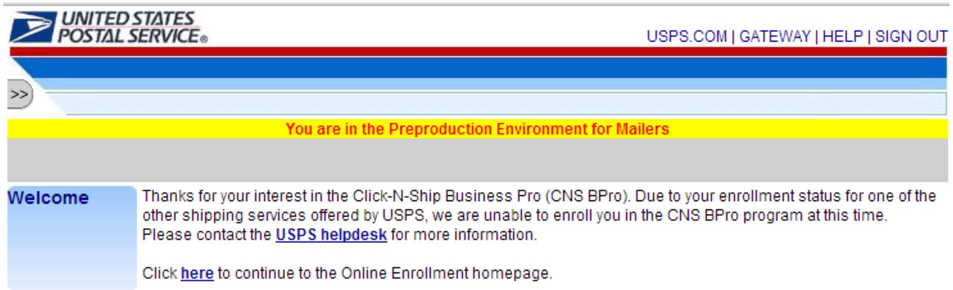


Figure 3.4: Pre-Prod CNS BPro Page

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.

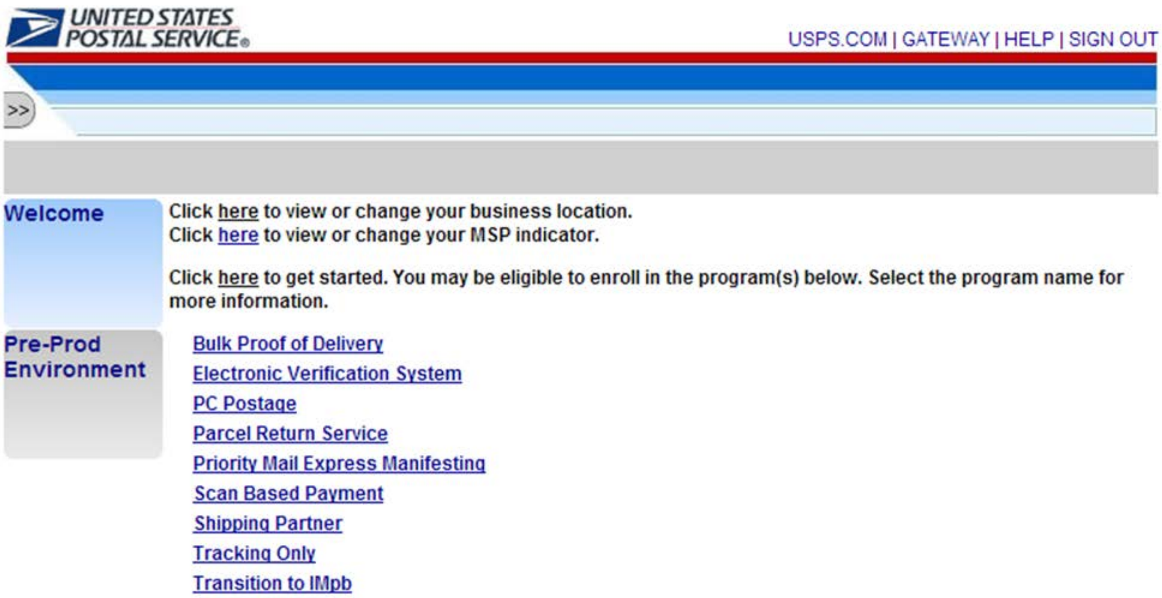


Figure 4.1 – Enrollment Home Page before My Profile Survey Completion

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.

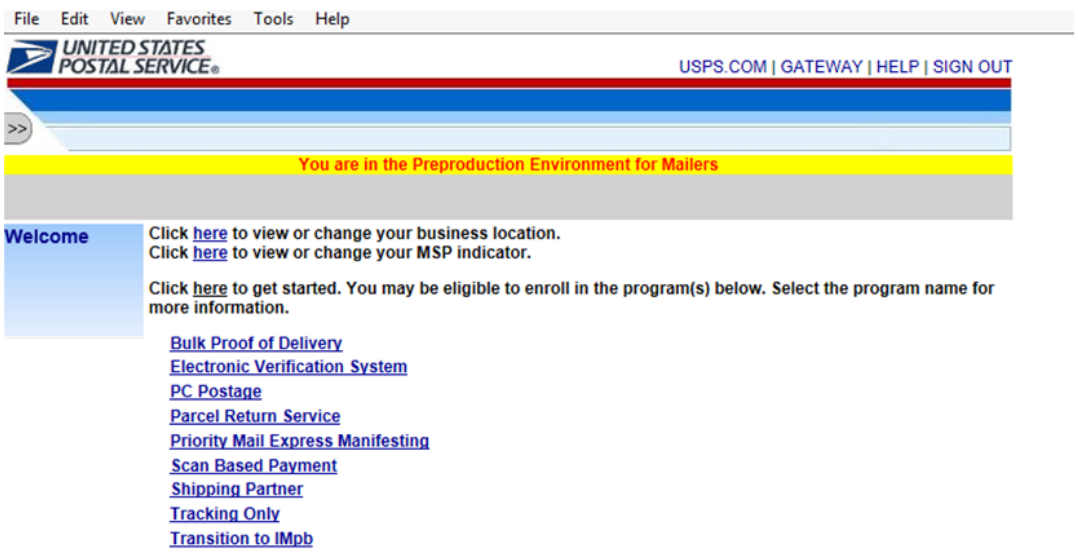


Figure 4.2 – Enrollment Home Page before My Profile Survey Completion - Pre-Prod

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.

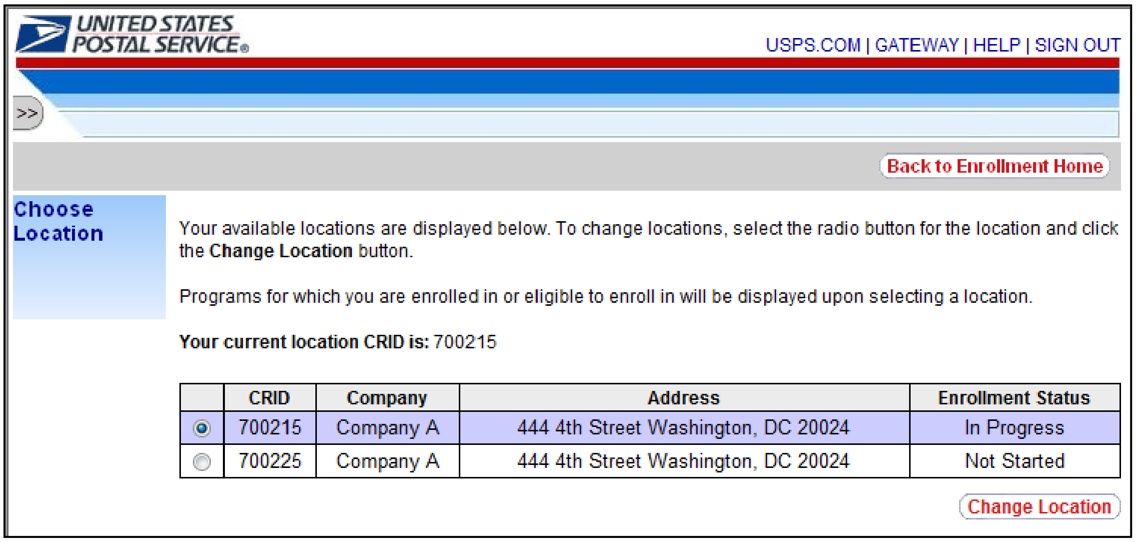


Figure 5.1 - Change Location Page

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.

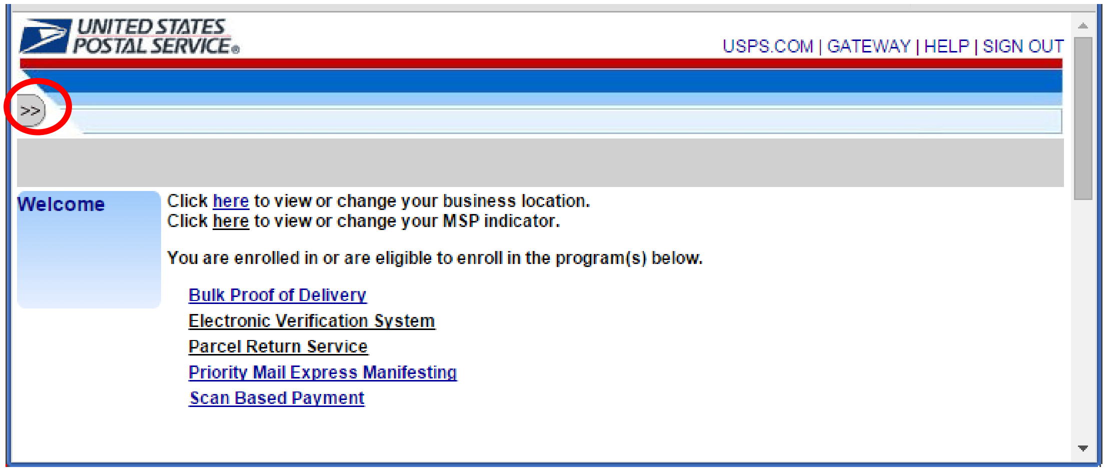


Figure 6.1 - Left Panel: Hidden icon

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).

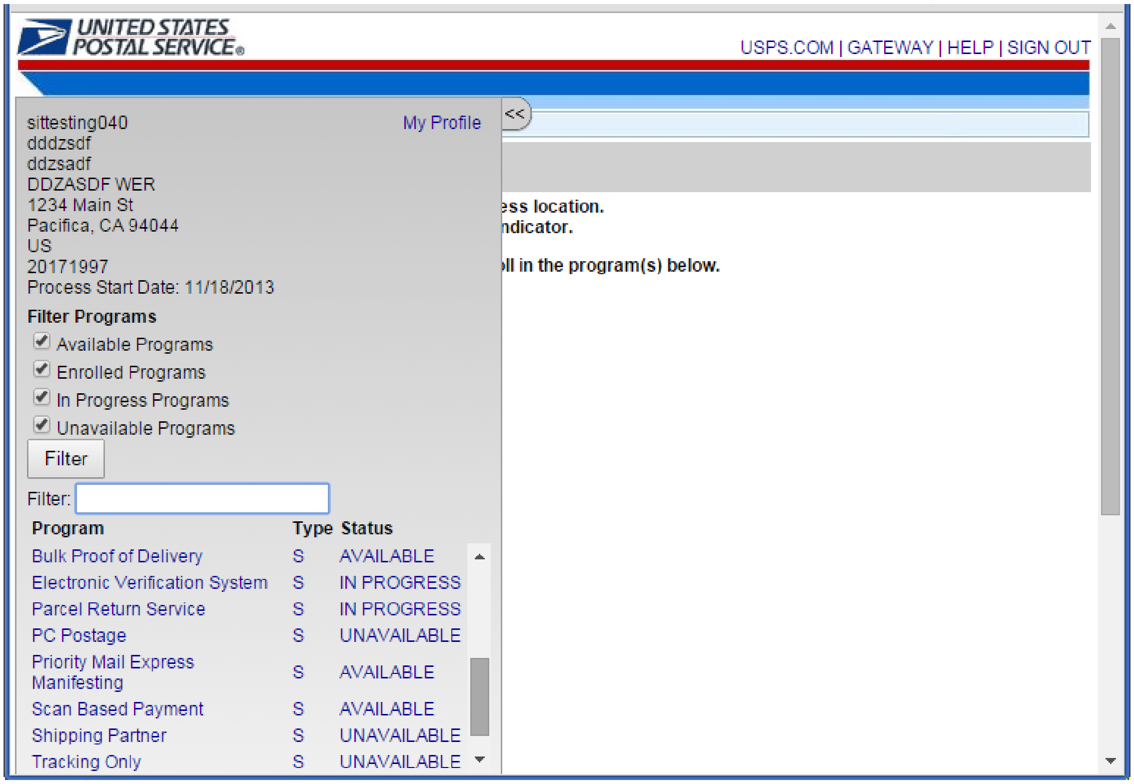


Figure 6.2 - Left Panel: Expanded display

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.

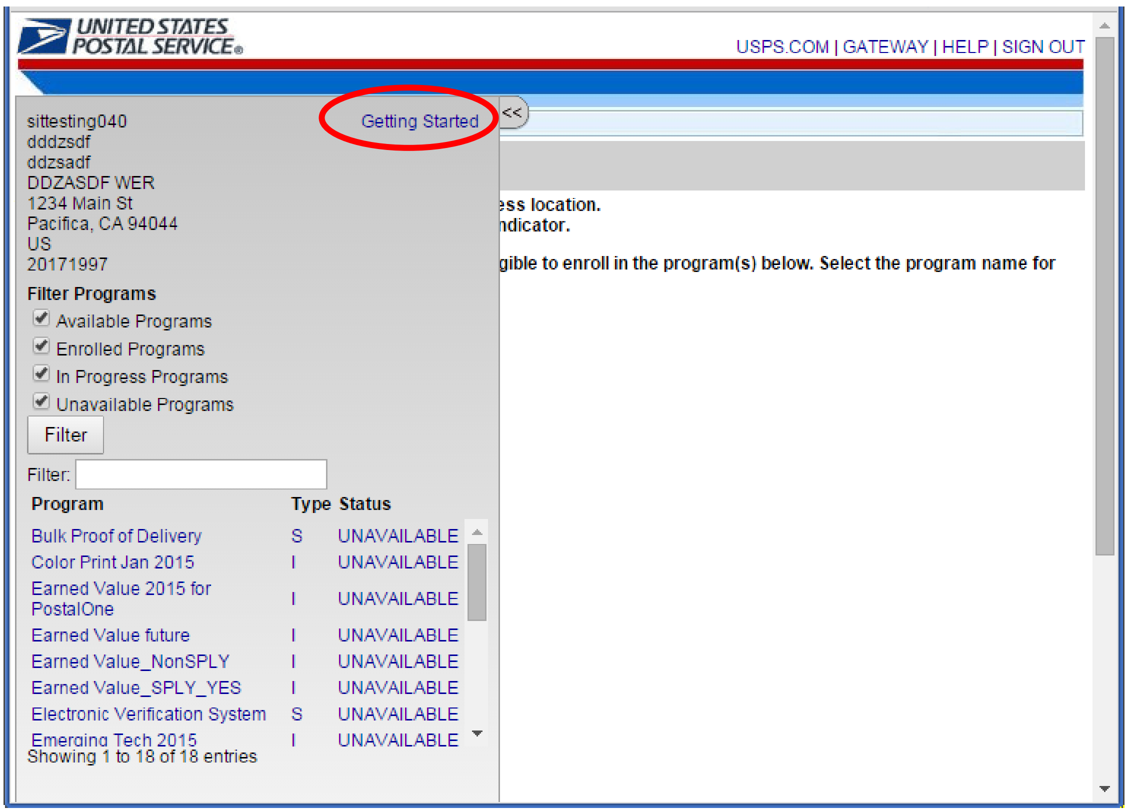


Figure 7.1 - My Profile Survey: Getting Started link

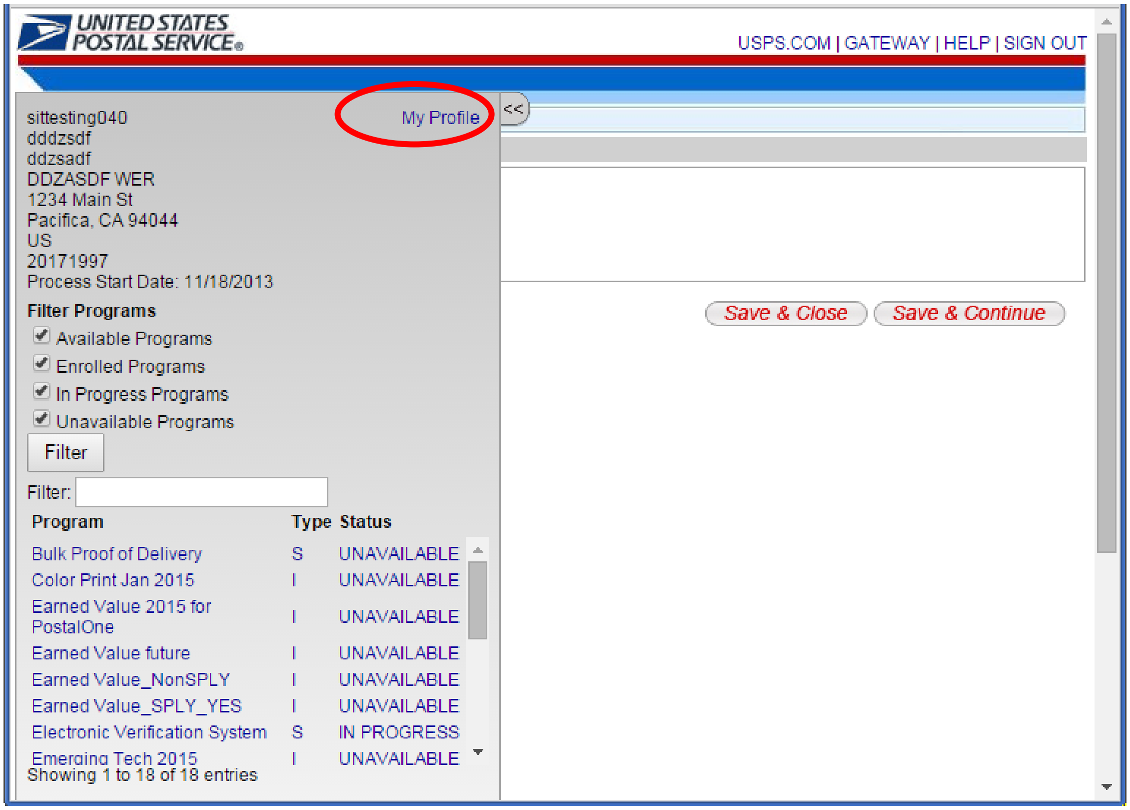


Figure 7.2 - My Profile Survey: Getting Started link becomes "My Profile" when profile is Completed.

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.

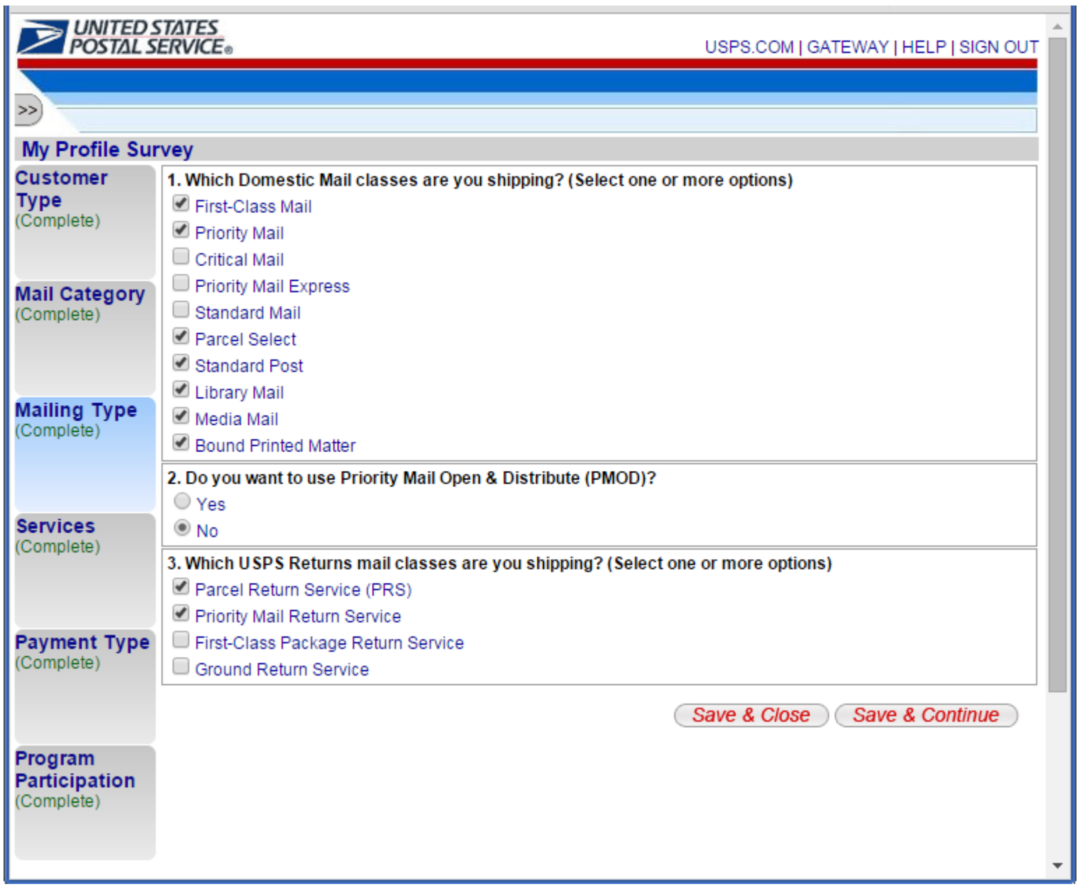


Figure 7.3 - My Profile Survey: Display

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.

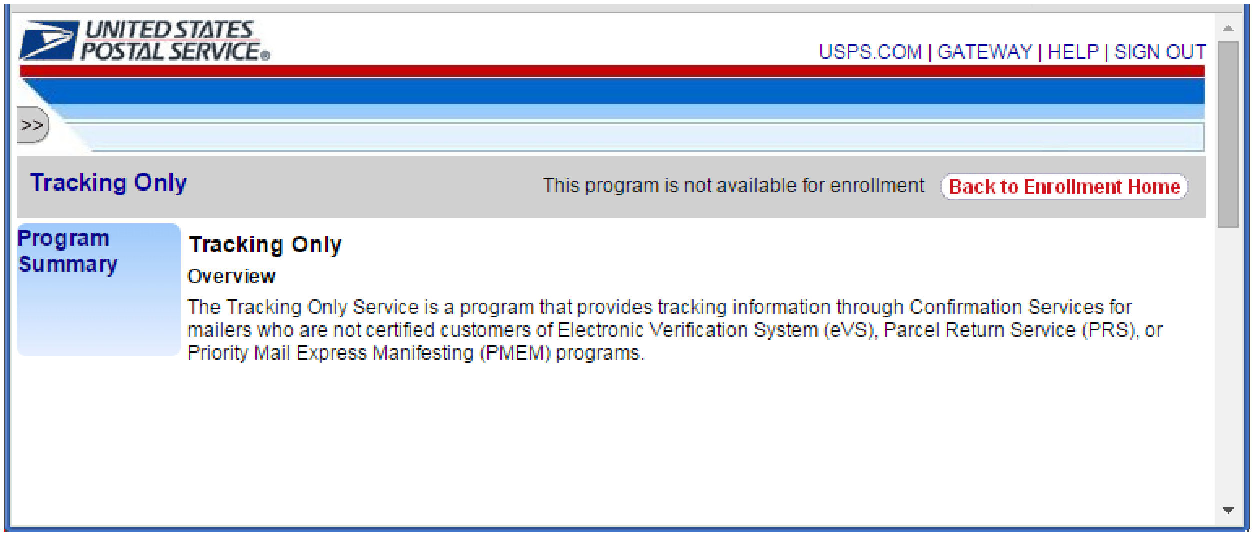


Figure 8.1 - Program Summary: Begin Enrollment button not displayed for unavailable programs

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

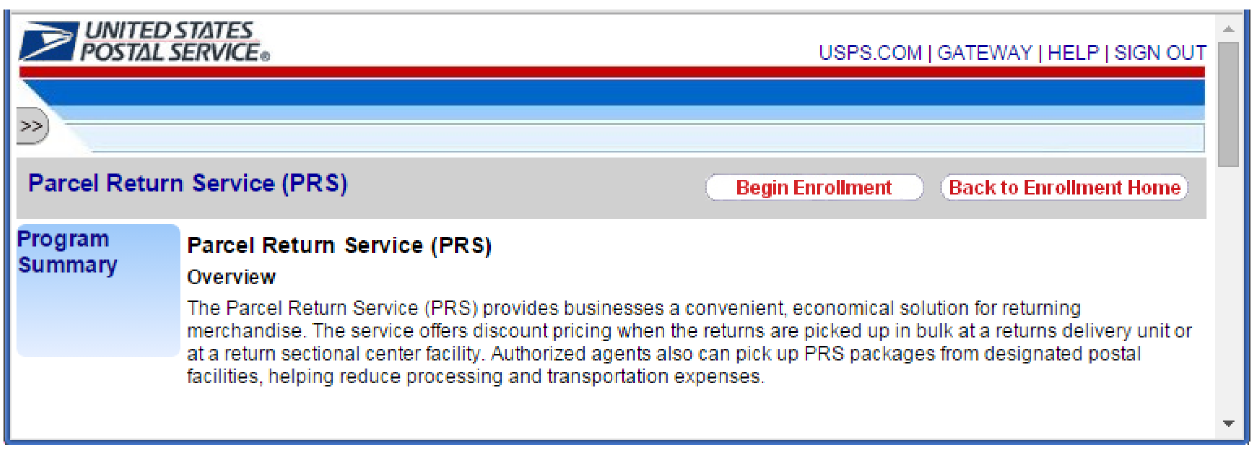


Figure 8.2 - Program Summary: Begin Enrollment button not displayed for unavailable programs

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.

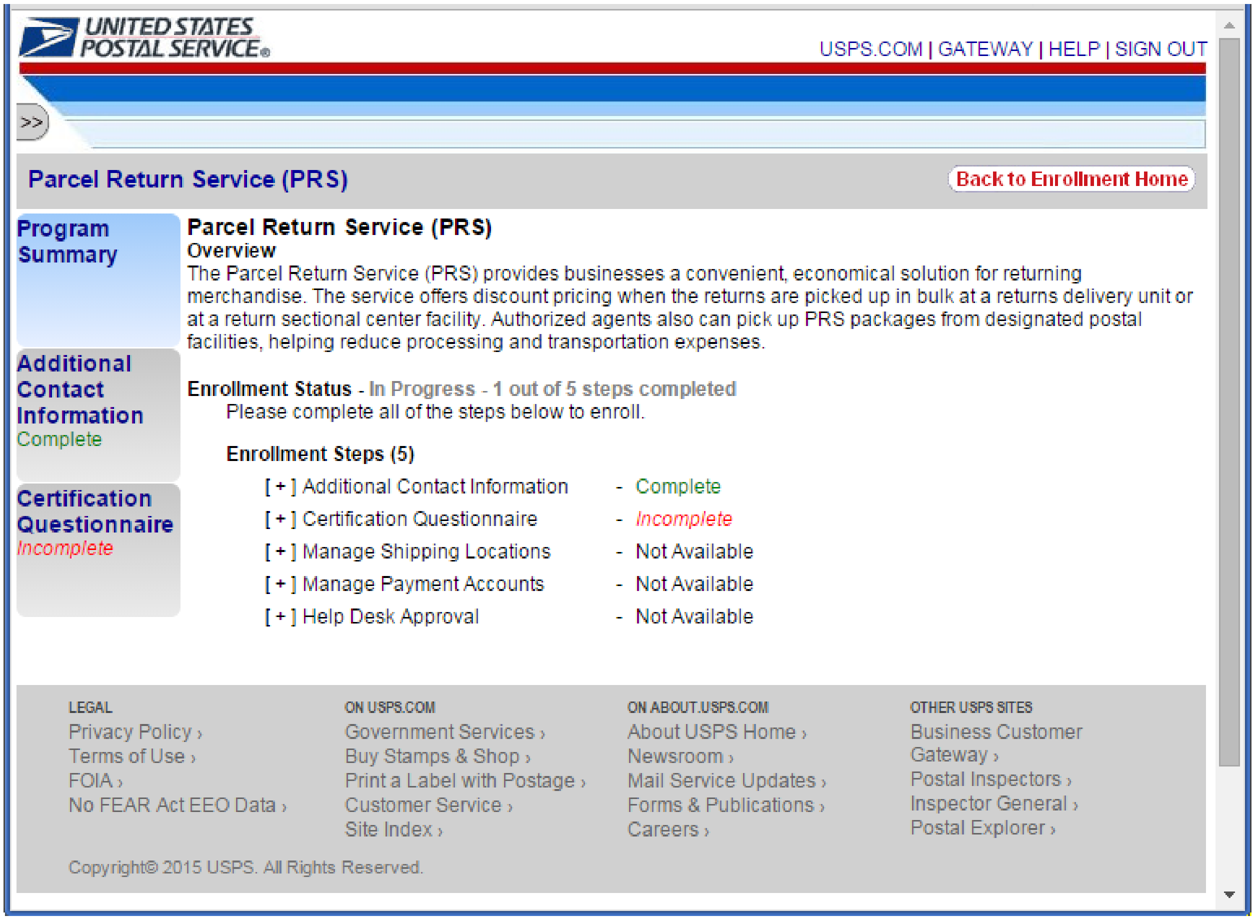


Figure 8.3 - Program Summary: enrollment tasks and status are displayed.

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.

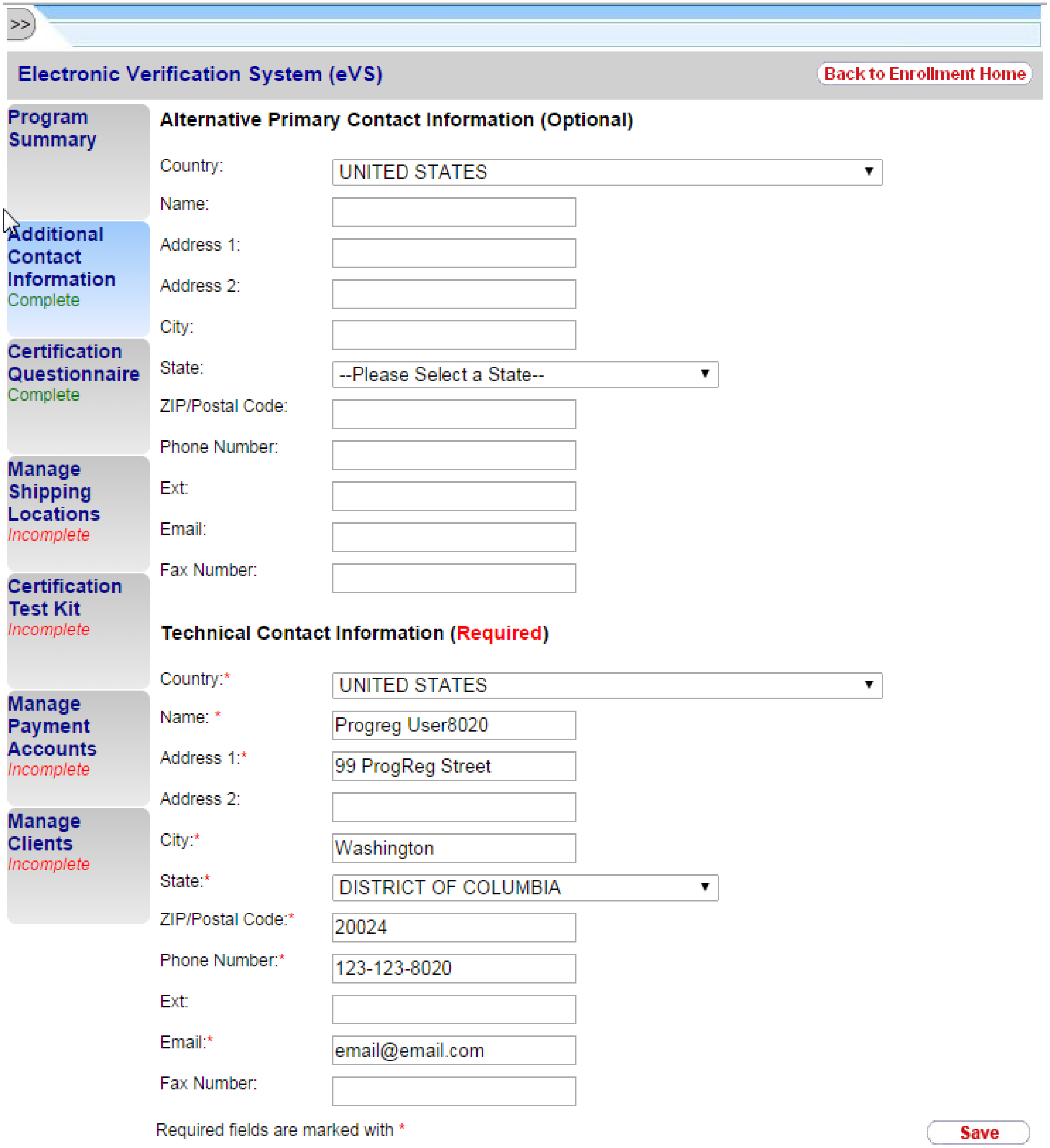


Figure 9.1 - Additional Contact Information: Display for Shipping Services

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.

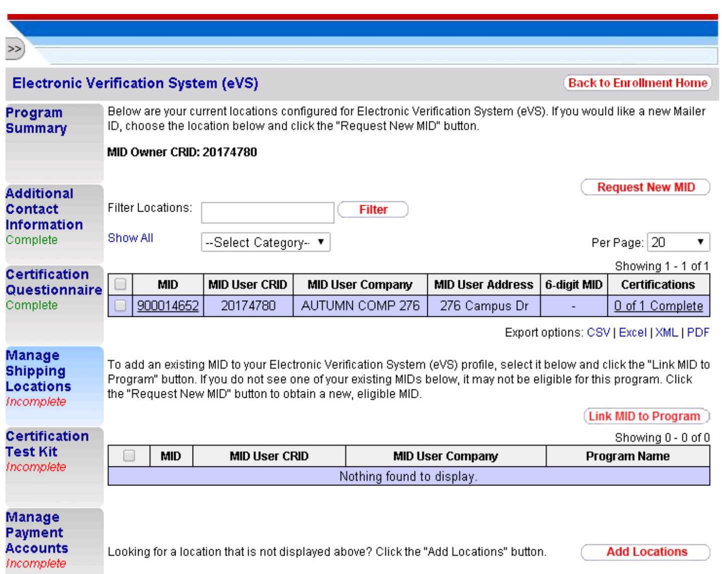


Figure 11.1 - Manage Shipping Locations - Data table displays

- 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.”

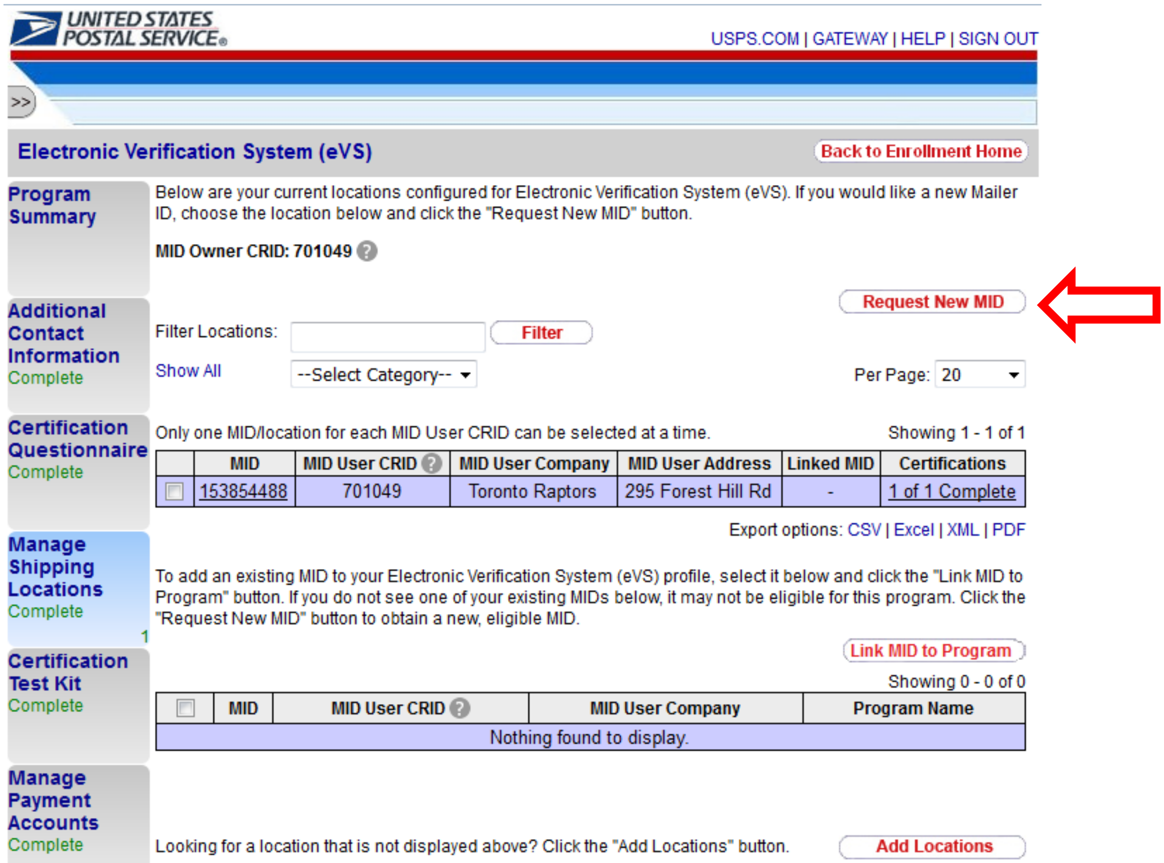


Figure 11.2 - Manage Shipping Locations: Request New MID button

- 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.

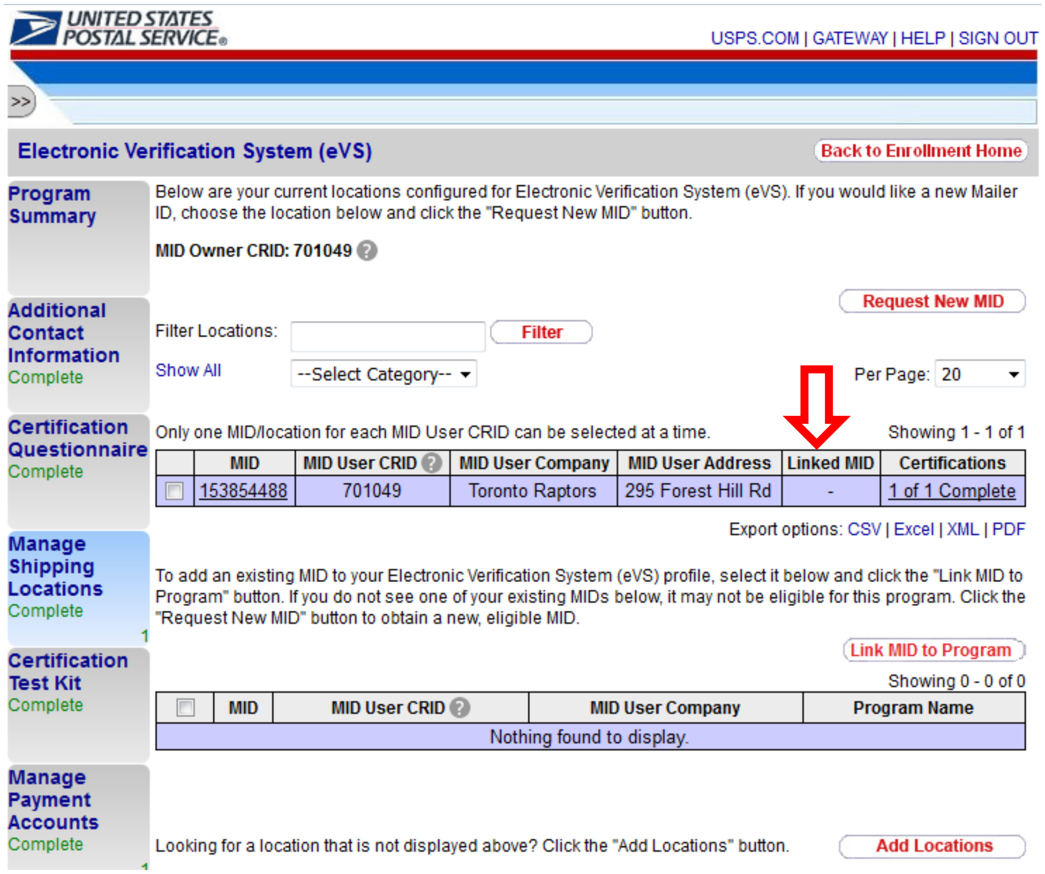


Figure 11.3 - Manage Shipping Locations: Linked MID column not populated

- 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.

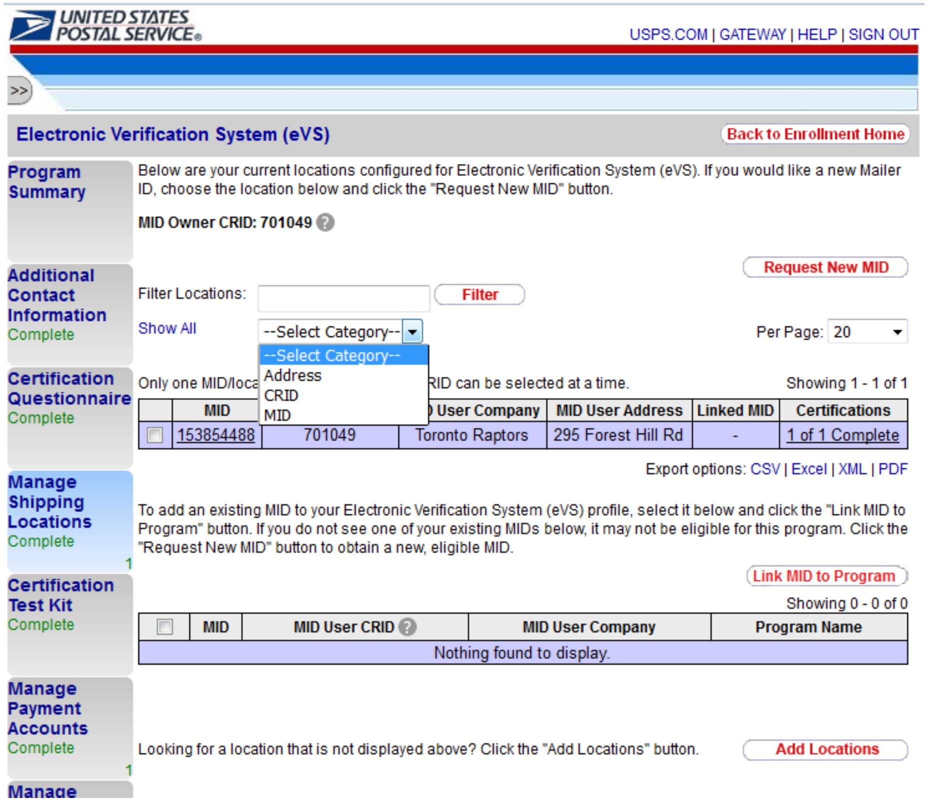


Figure 11.4 - Manage Shipping Locations: Filter display

- 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).

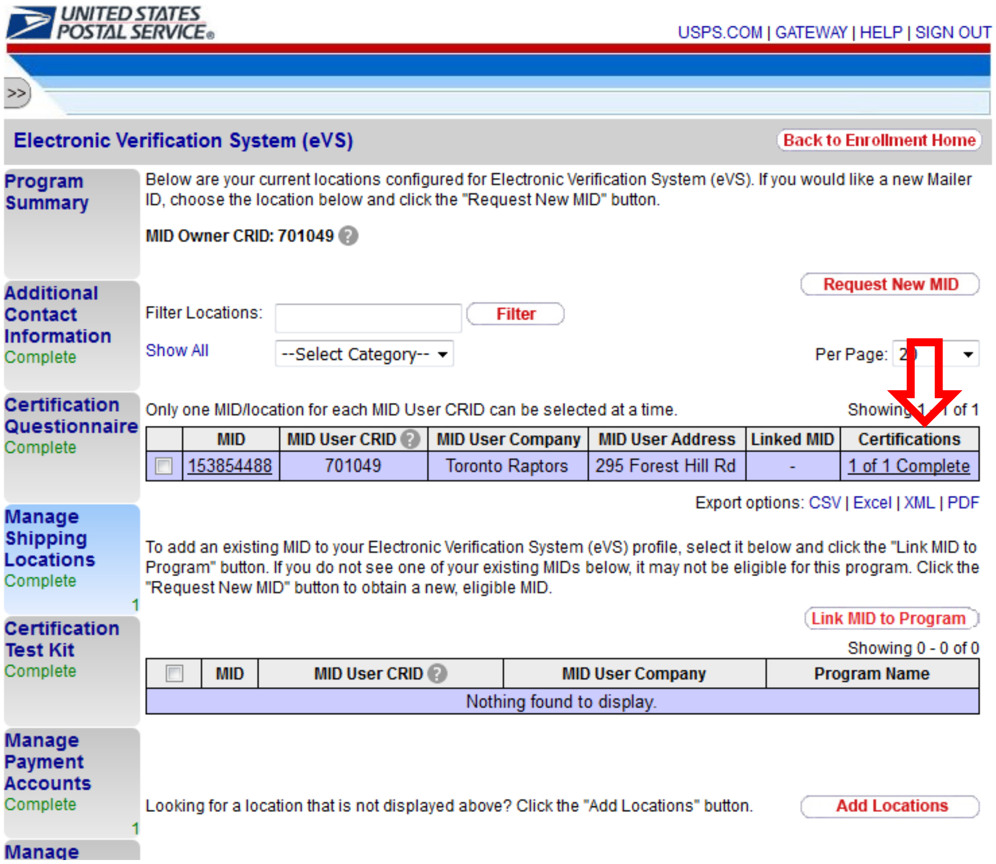


Figure 11.5 - Manage Shipping Locations: Certifications Link

- <u>Link MID to Program:</u> 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.

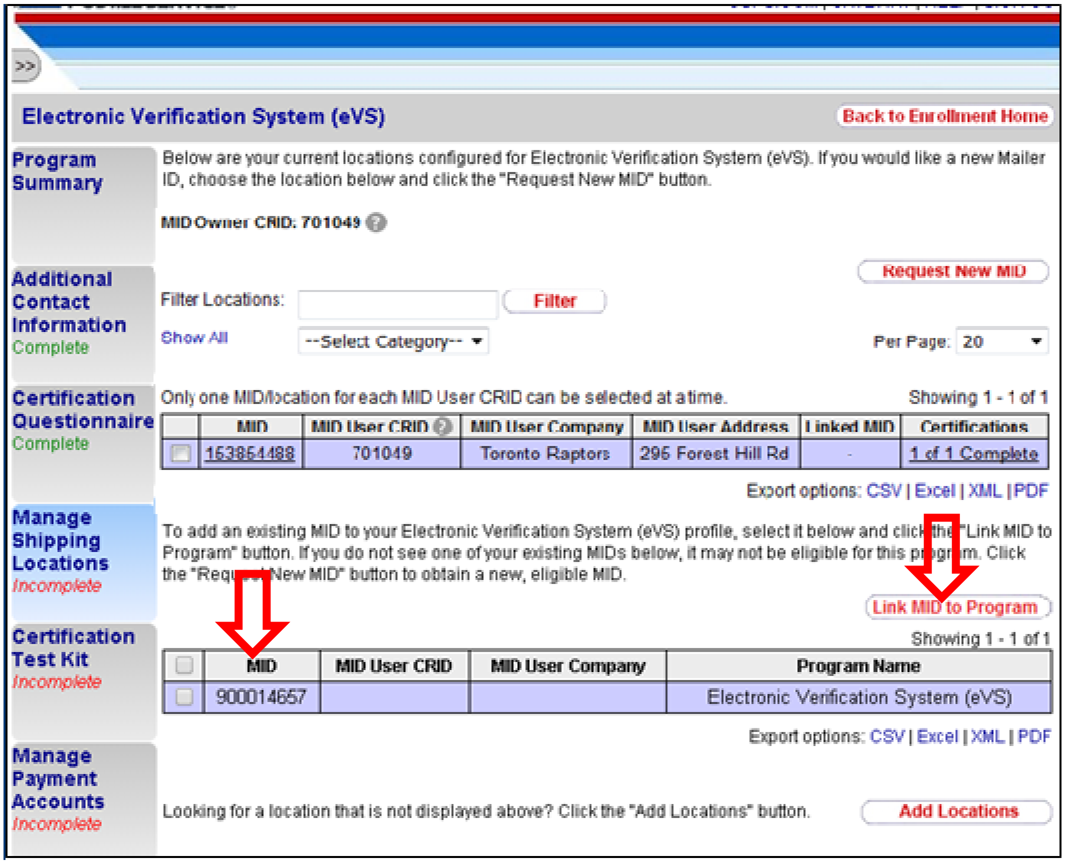


Figure 11.6 - Manage Shipping Location: Link MID to Program

- <u>Add Locations</u>: 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.

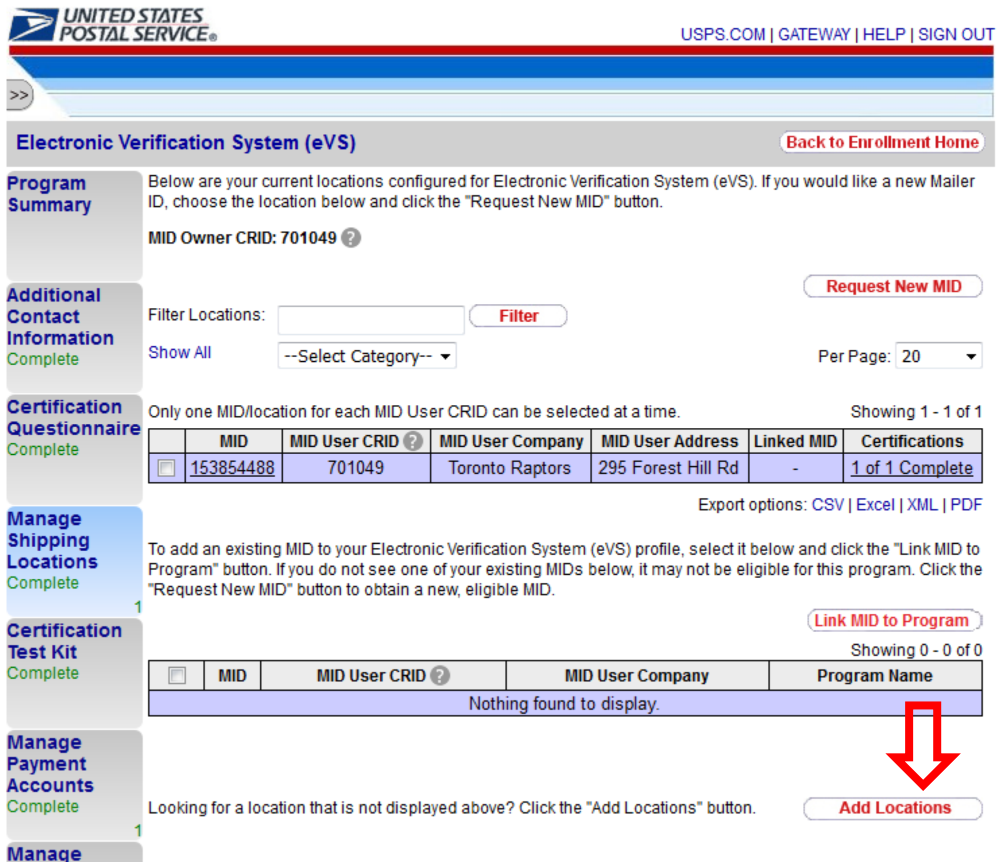


Figure 11.7 - Manage Shipping Location: Add Locations button

- 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.

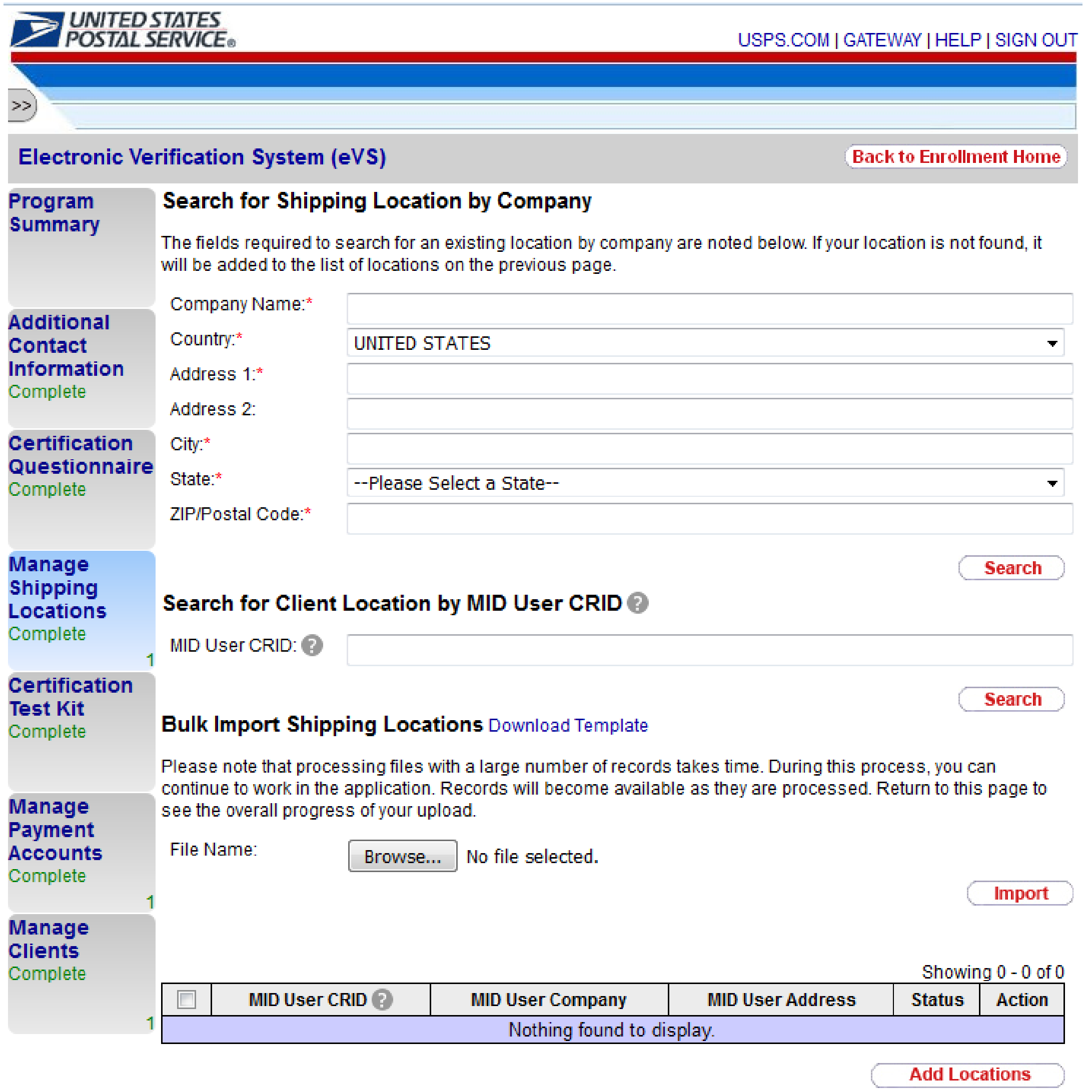


Figure 11.8 - Manage Shipping Locations: Search for Locations screen

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.

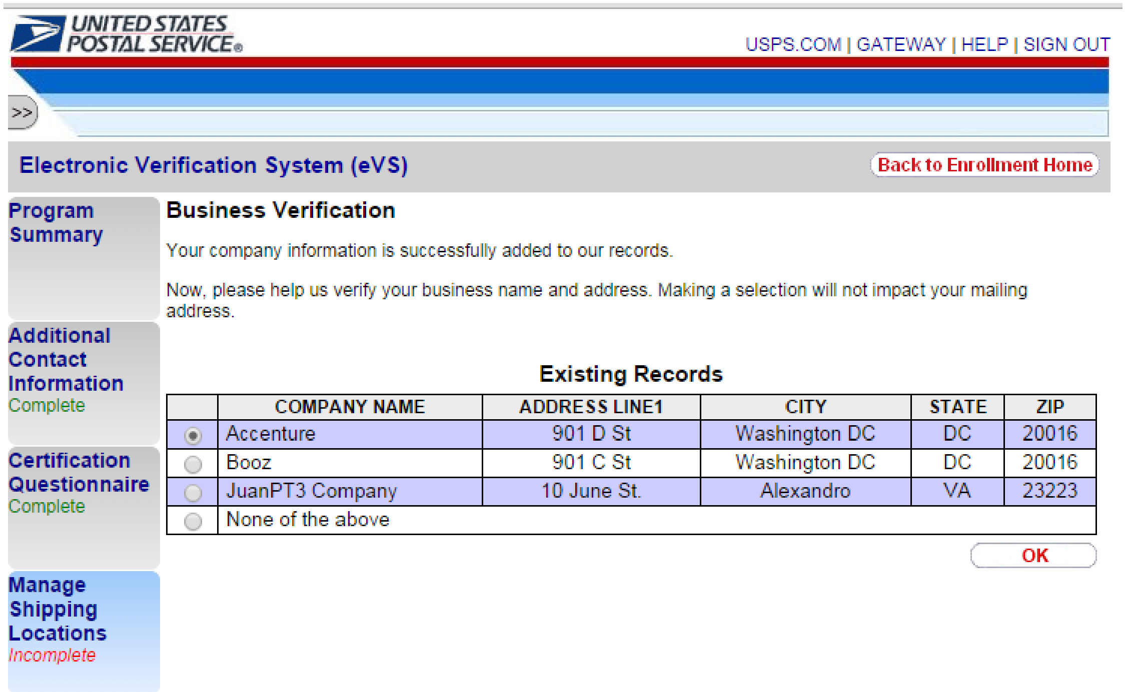


Figure 11.9 - Manage Shipping Location: Business Verification

- 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.

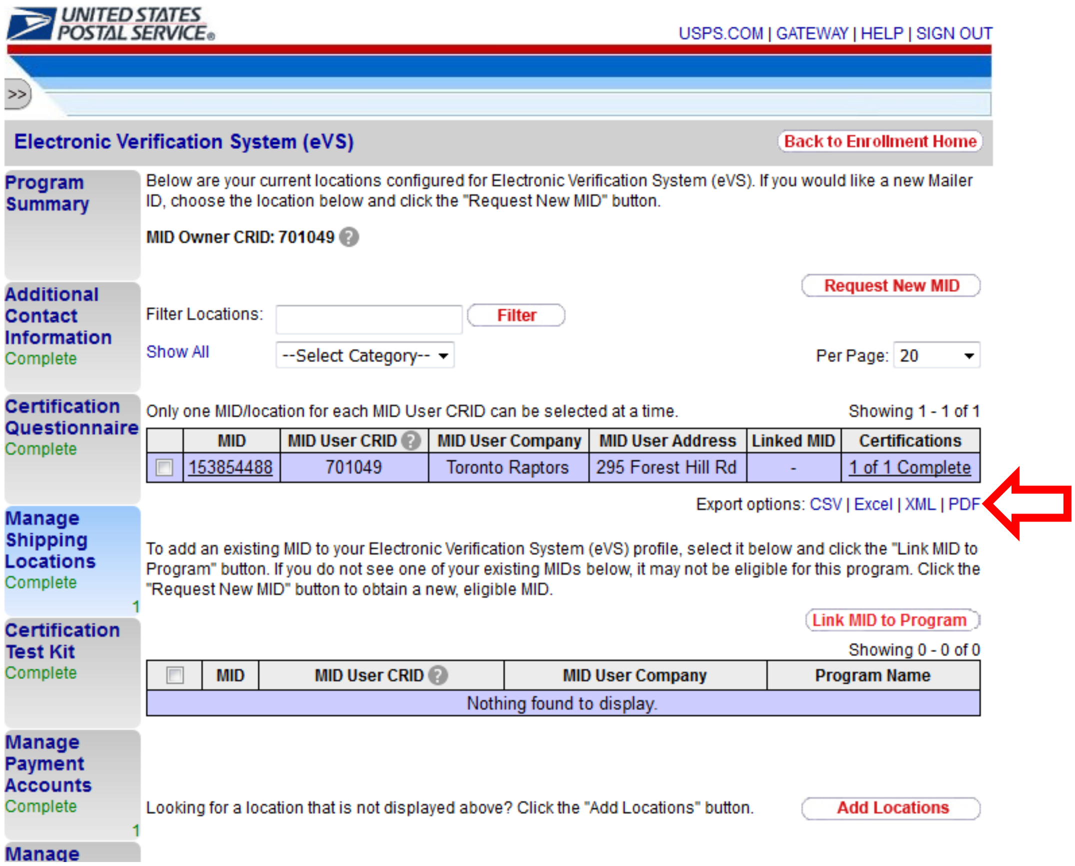


Figure 11.10 - Manage Shipping Locations: Export options

- 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

- <u>Data Table</u>: 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.
- <u>Label/File Certification drop-downs:</u> 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”.

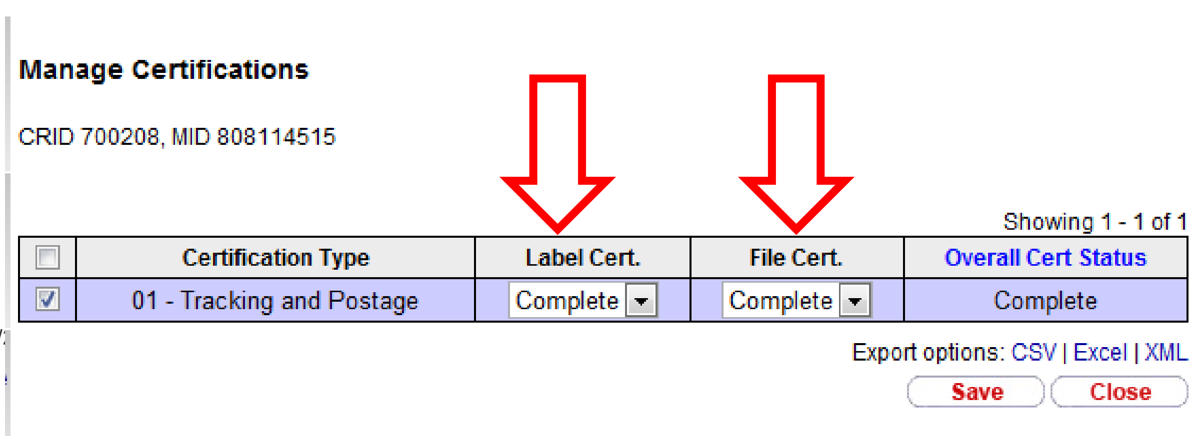


Figure 12.1 - Manage Certifications: Label and File Cert columns

- 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
☑	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

- <u>Checkboxes</u>: Allow the user to select one or multiple permits.
- <u>Link button</u>: Allows the user to link selected permit to program.
- <u>Unlink button</u>: Allows the user to unlink selected permit from program.
- <u>Filter button</u>: 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 be selecting 20, 40, 60, 80, or 100 in the drop-down menu. The <Previous and Next> links appear when additional pages of records exists.
- 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).

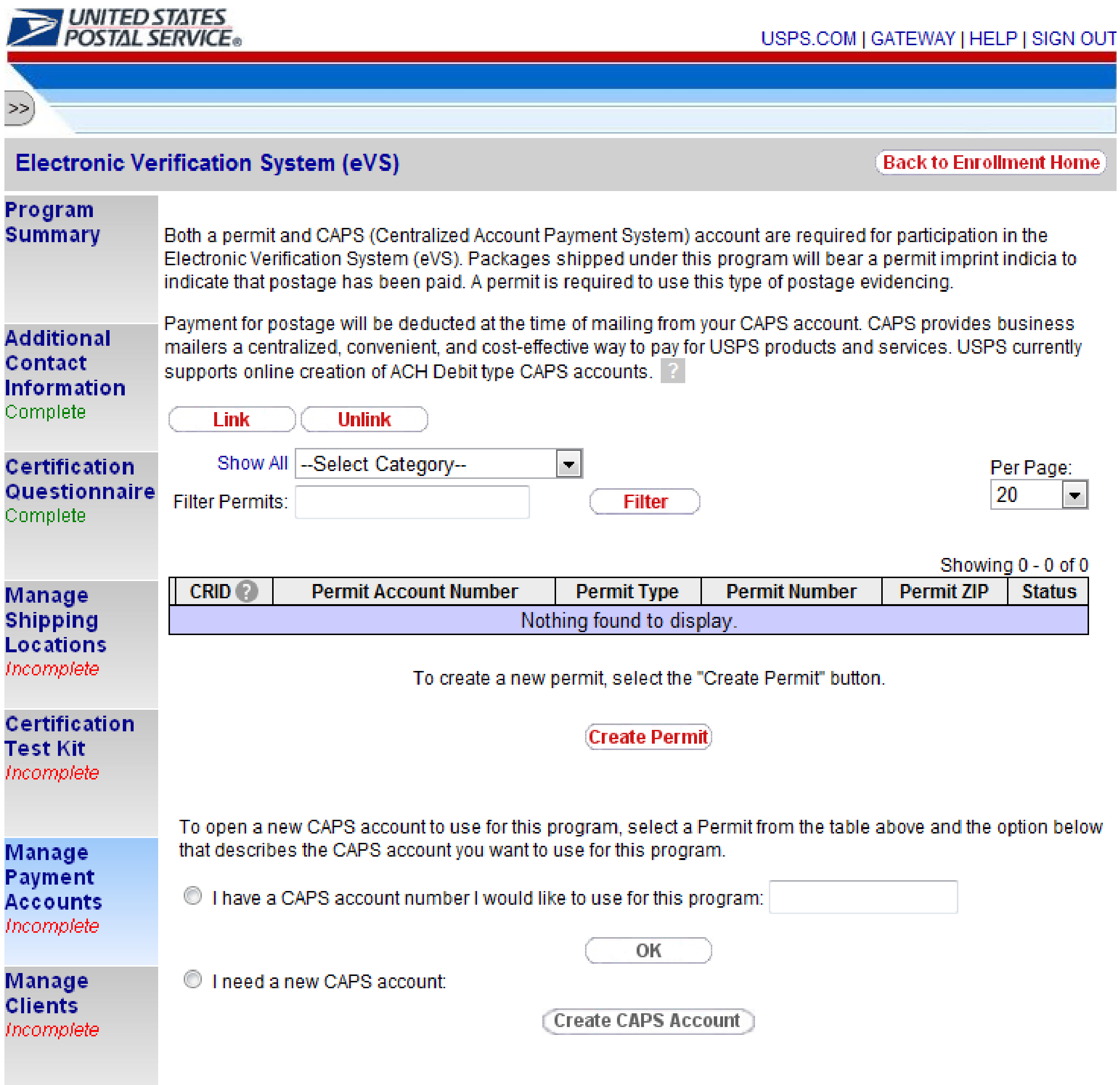


Figure 13.1.0 - Manage Payment Accounts: eVS, PRS display

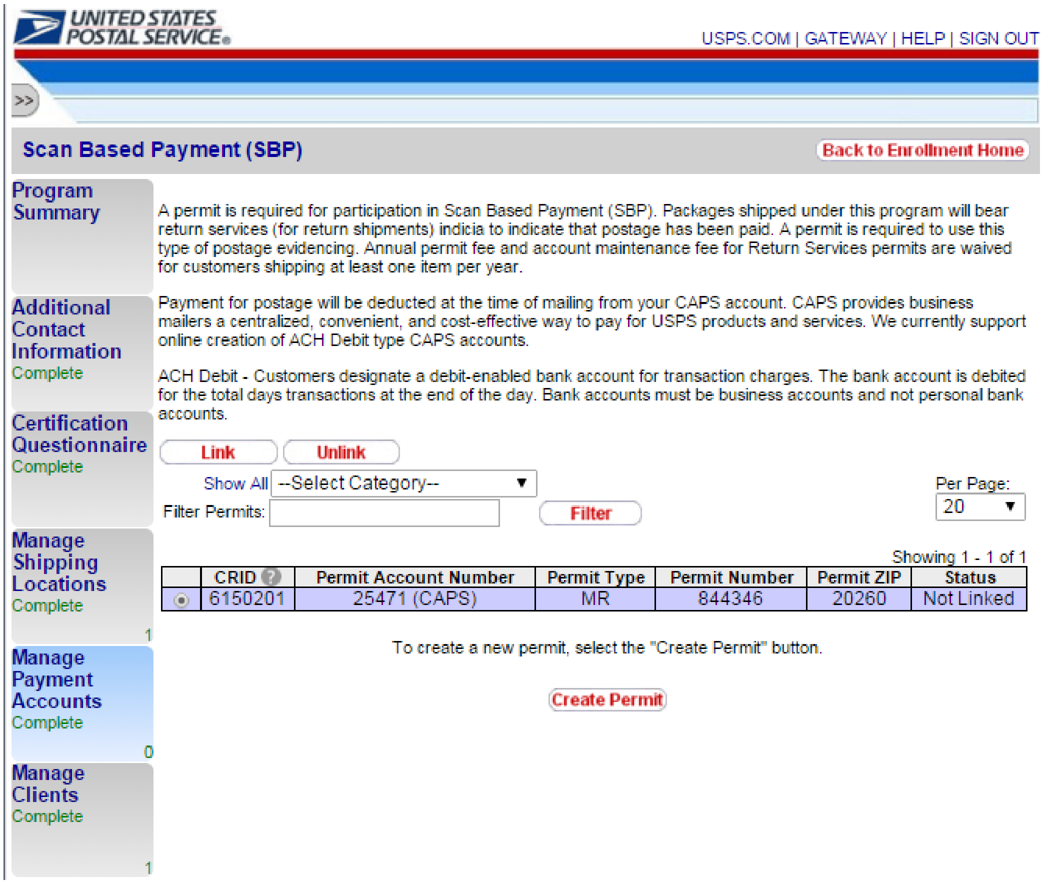


Figure 13.1.1 - Manage Payment Accounts: SBP display

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

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

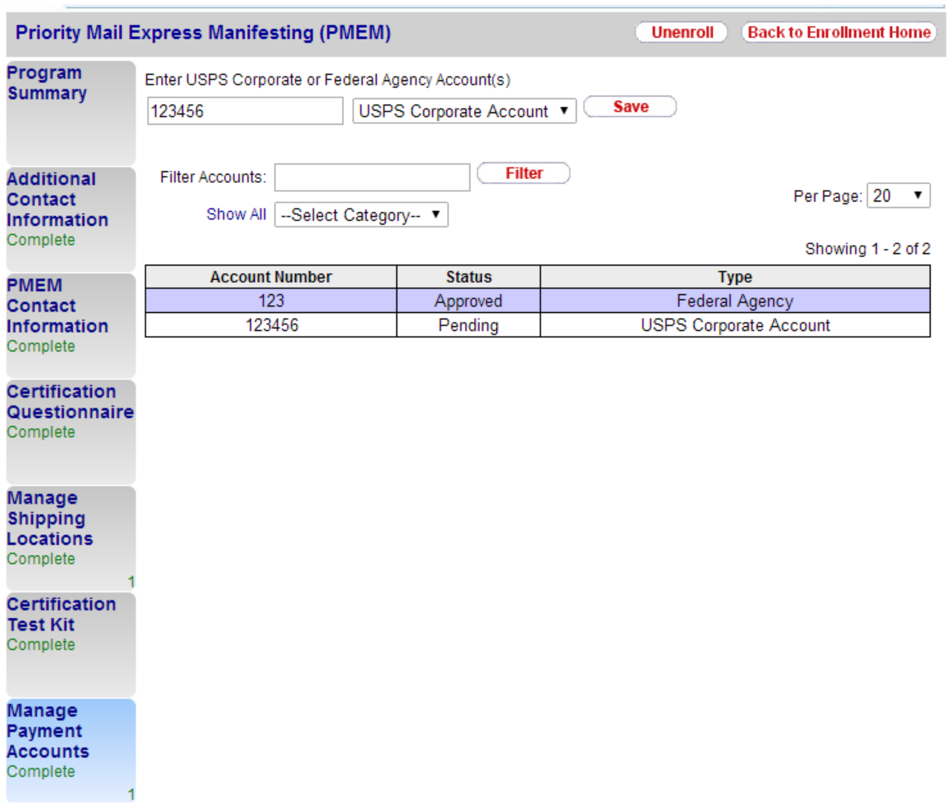


Figure 13.2 - Manage Payment Accounts: PMEM display

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.

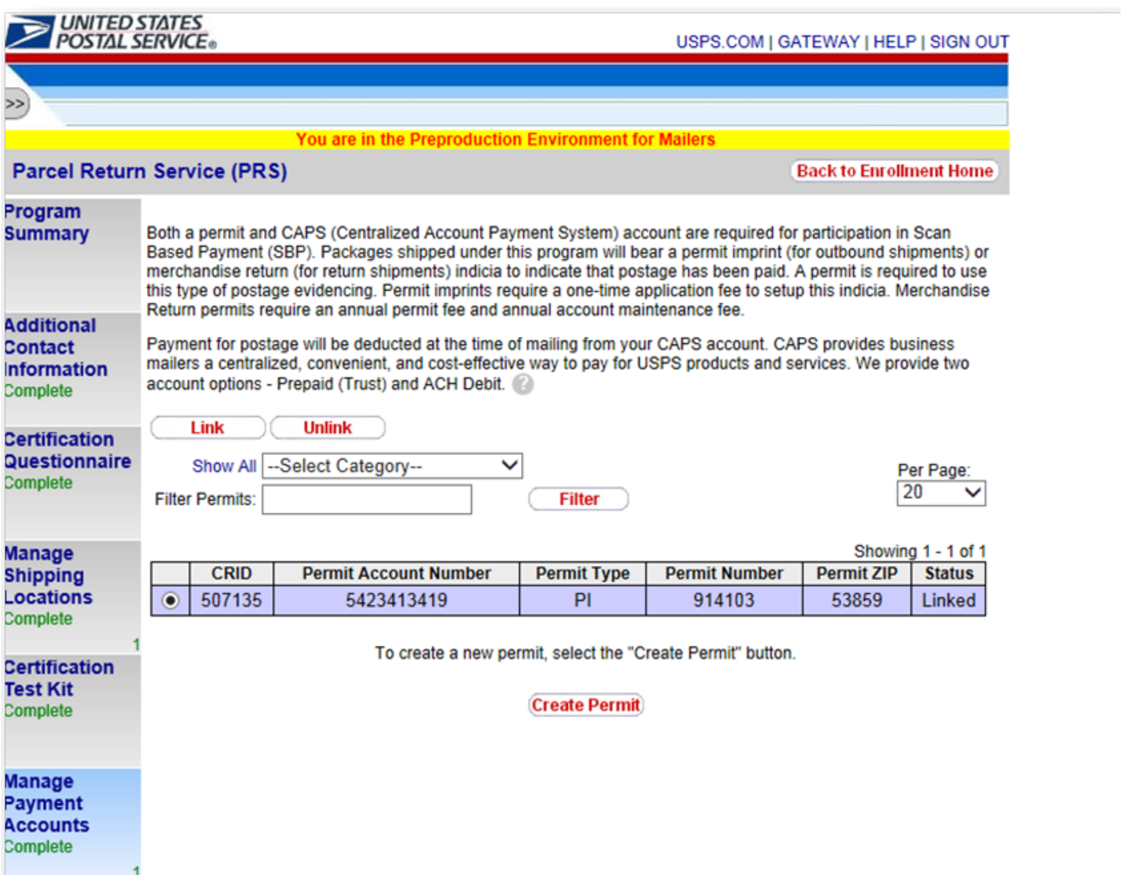


Figure 13.3 – Pre-Prod Manage Payment Accounts page

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

- <u>Data Tables</u>: 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.

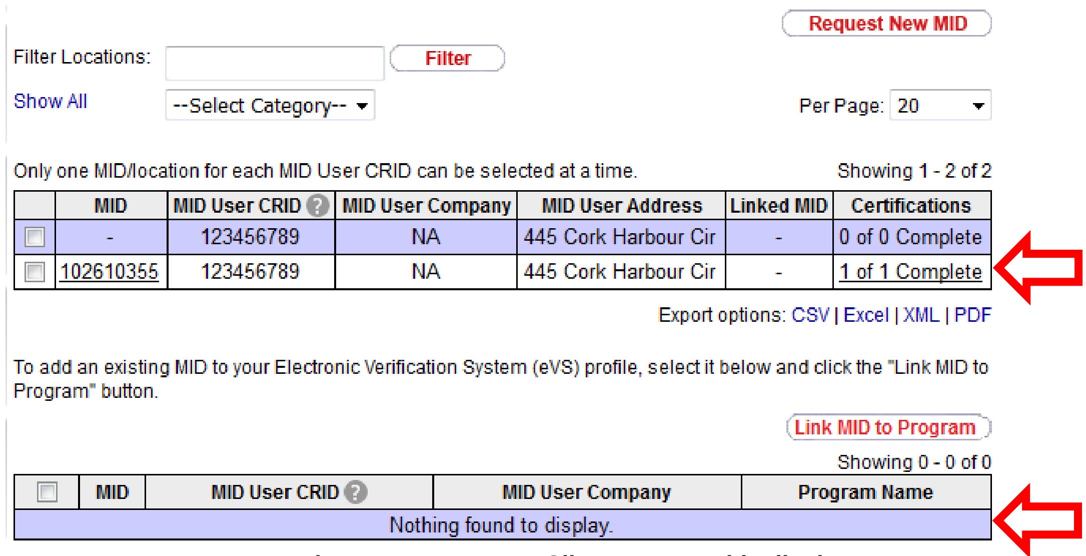


Figure 14.1 - Manage Clients - Data table displays

- 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.”

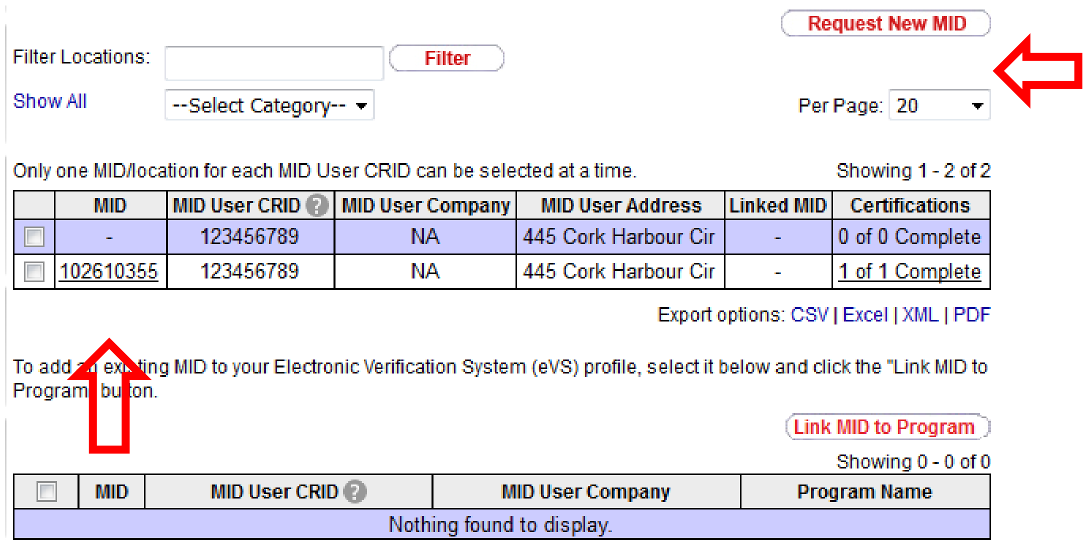


Figure 14.2 - Manage Clients: Request New MID button

- 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.

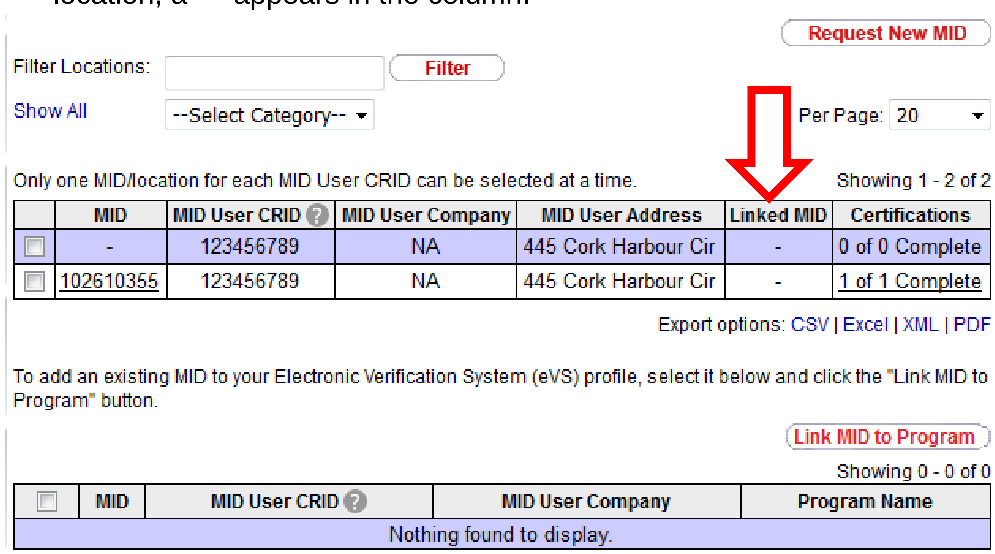


Figure 14.3 - Manage Clients: Linked MID column not populated

- 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.

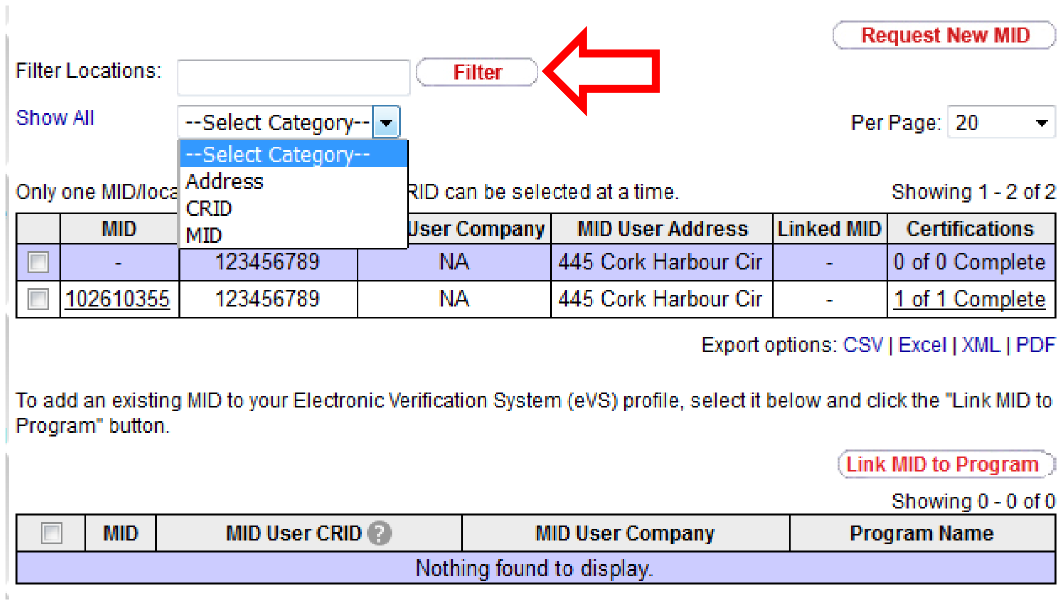


Figure 14.4 - Manage Clients: Filter display

- 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).

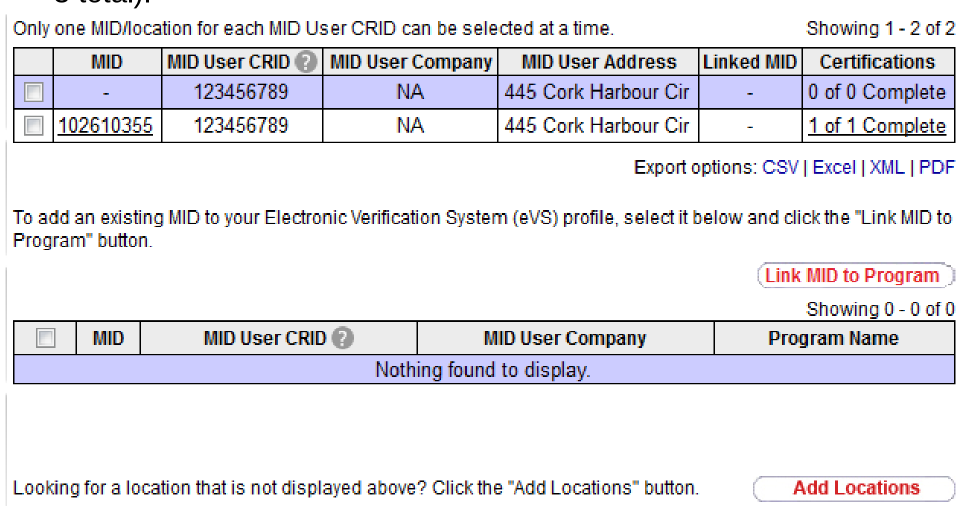


Figure 14.5 - Manage Clients: Certifications Link

- 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.

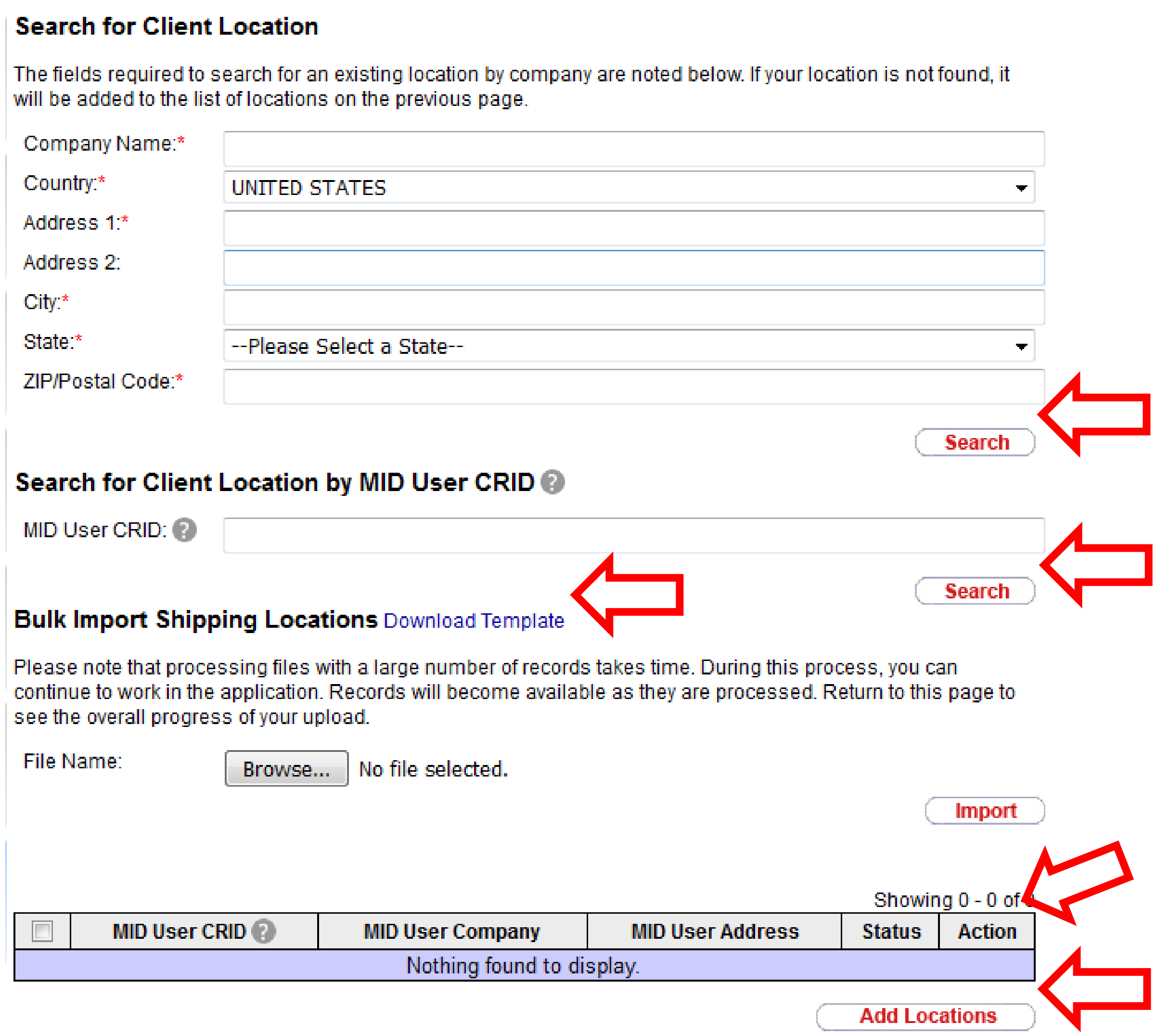


Figure 14.6 - Manage Clients: Search for Client Locations screen

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.

- <u>Add Locations button</u>: 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.

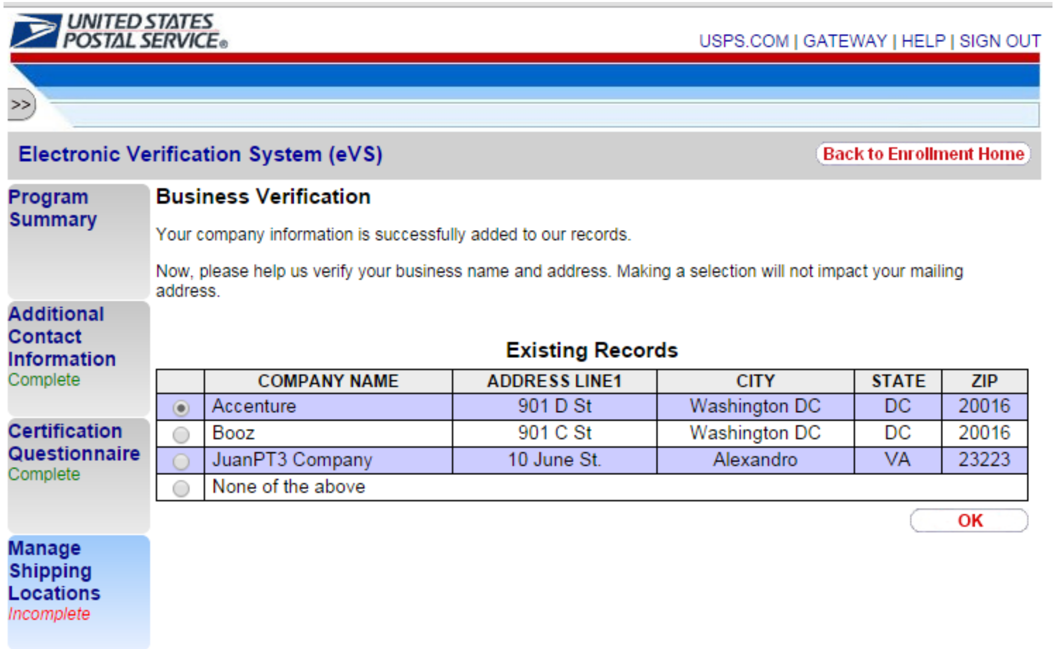


Figure 14.7 - Manage Clients: Business Verification

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.

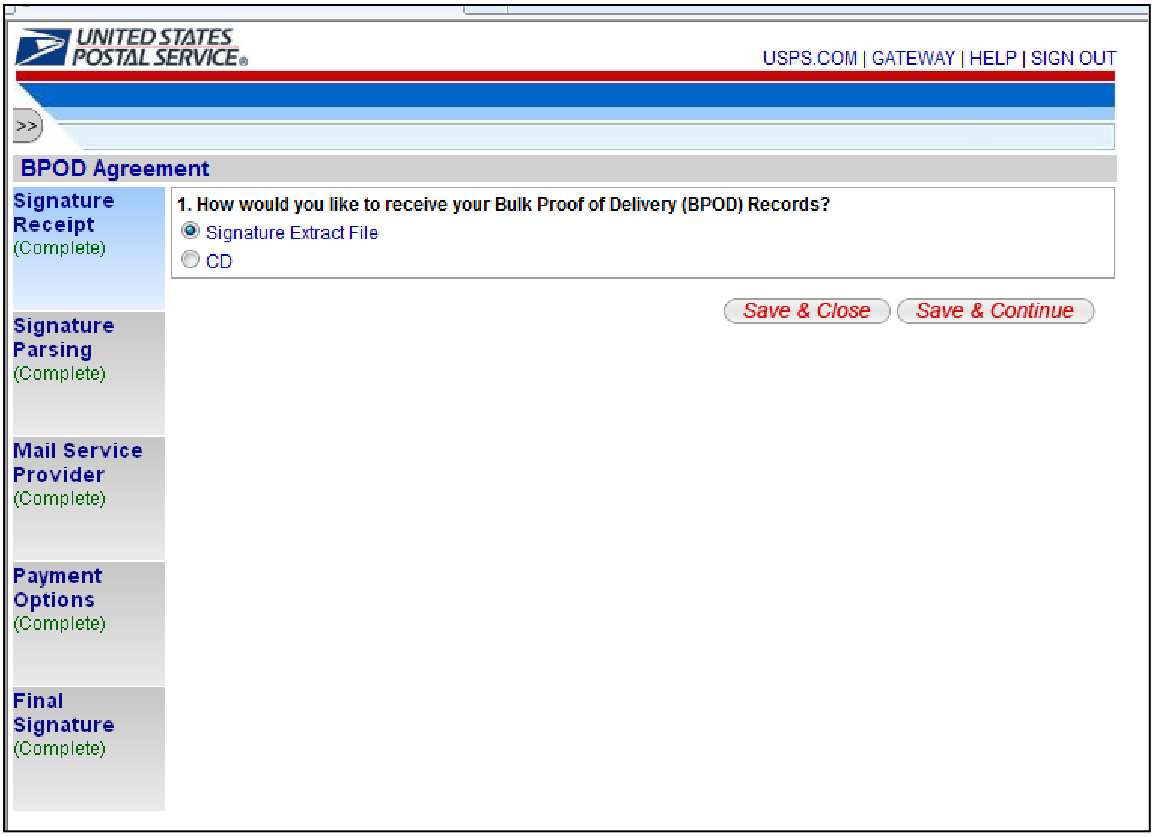


Figure 15.1 - BPOD Agreement

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.

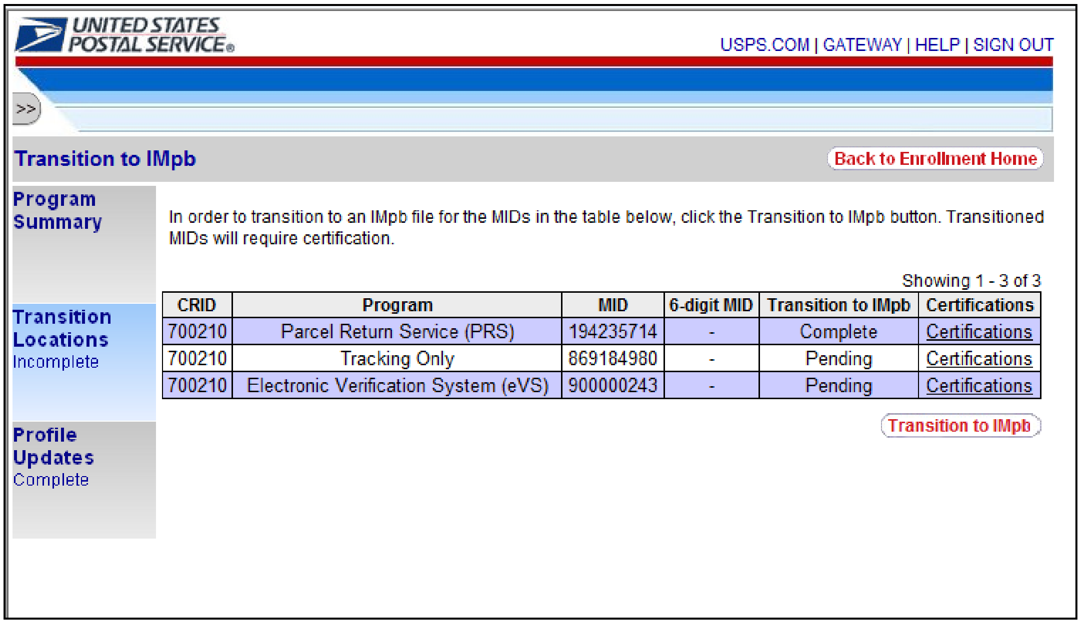


Figure 16.1 - Transition Locations task

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.

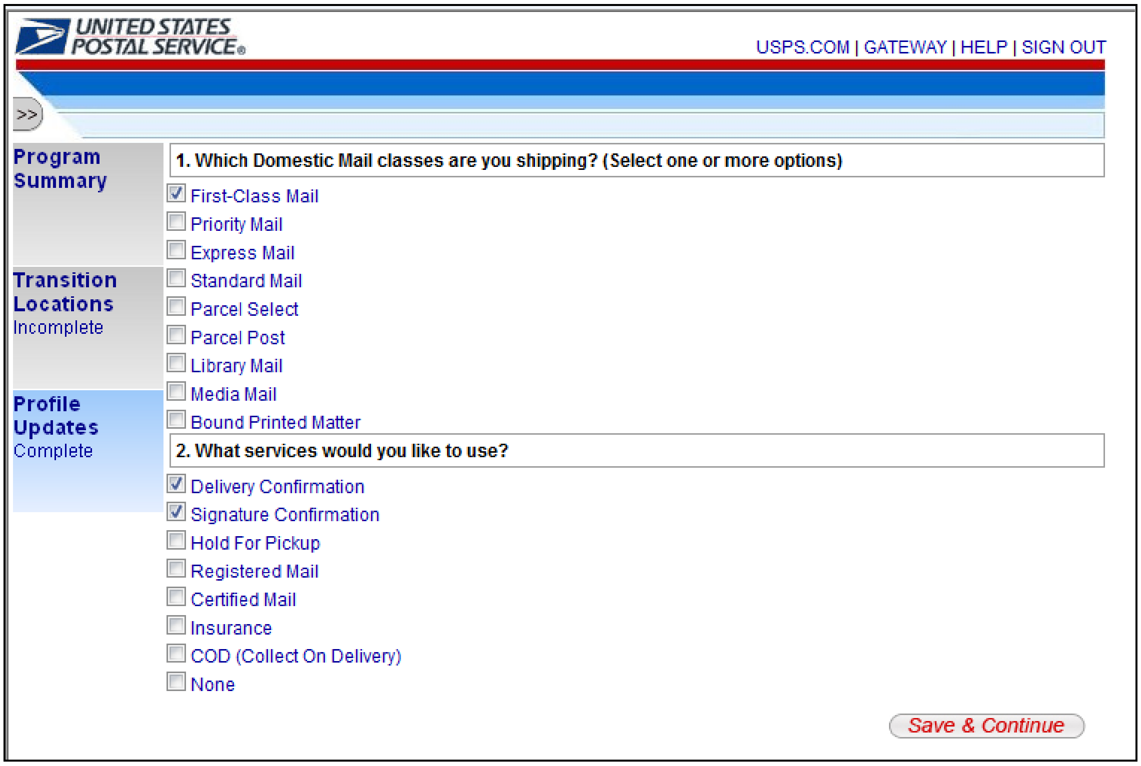


Figure 17.1 - Profile Updates task

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.

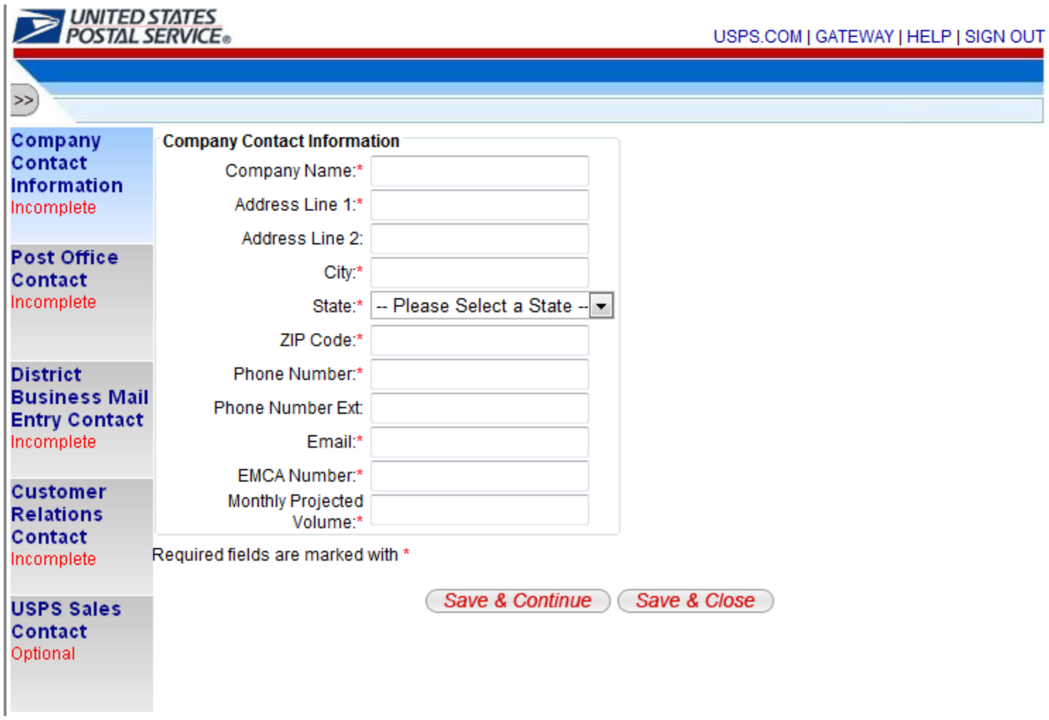


Figure 18.1 – PMEM Contact Task

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

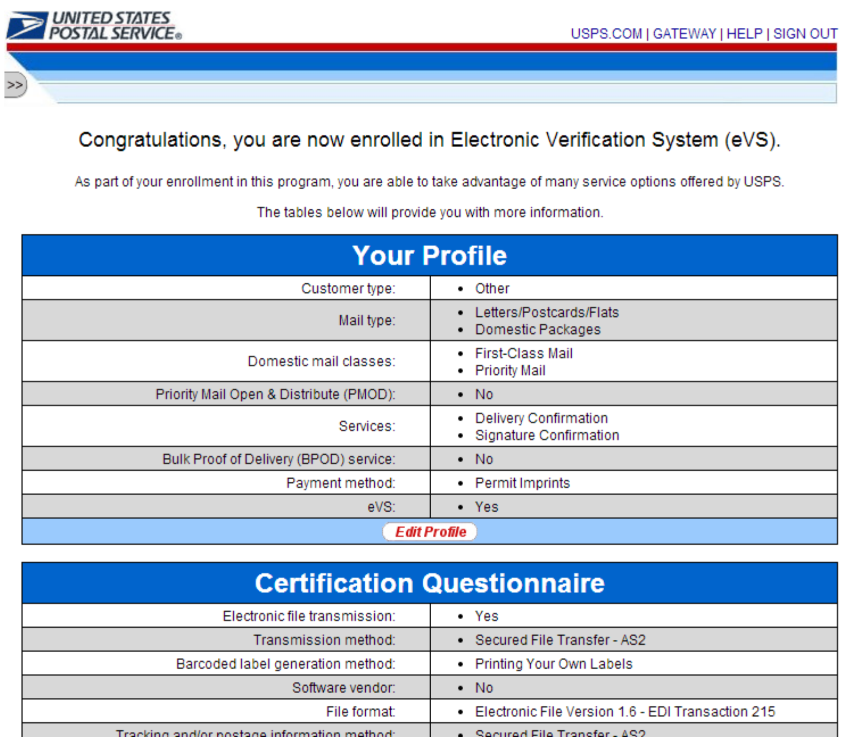
No change in functionality in Pre-Prod.

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.


UNITED STATES POSTAL SERVICE

USPS.COM | GATEWAY | HELP | SIGN OUT

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

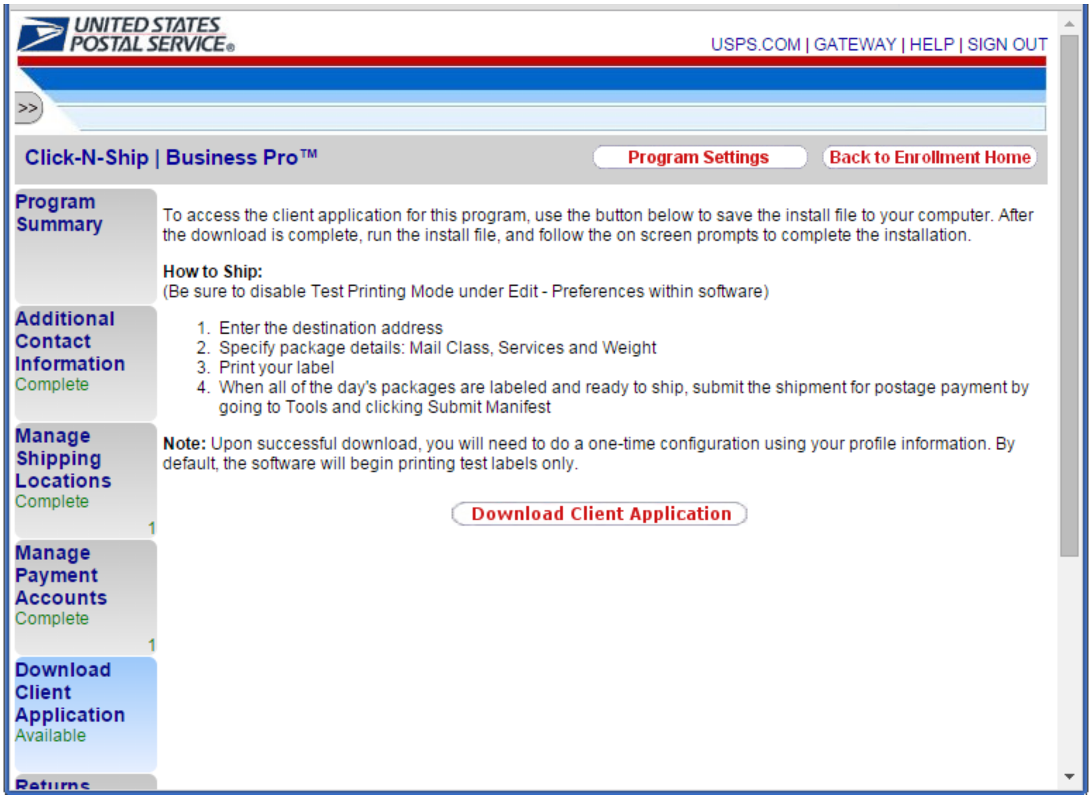


Figure 19.2 – CNSBPro download Client Application page

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.

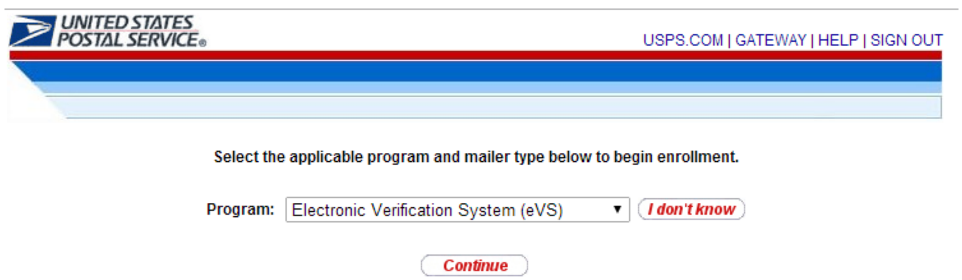


Figure 19.3: One-click landing page

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

- <u>RadioButtons</u>: Allow the user to select a permit.
- <u>Link button</u>: Allows the user to link selected permit to program.
- <u>Unlink button</u>: Allows the user to unlink selected permit from program.
- <u>Filter button</u>: Filters results based on filter textbox and category (CRID, Permit Account Number, Permit Number, Permit Type, Status)
- <u>Sorting</u>: 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.
- <u>Pagination</u>: 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 be selecting 20, 40, 60, 80, or 100 in the drop-down menu. The <Previous and Next> links appear when additional pages of records exists.
- <u>Table display</u>: 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.

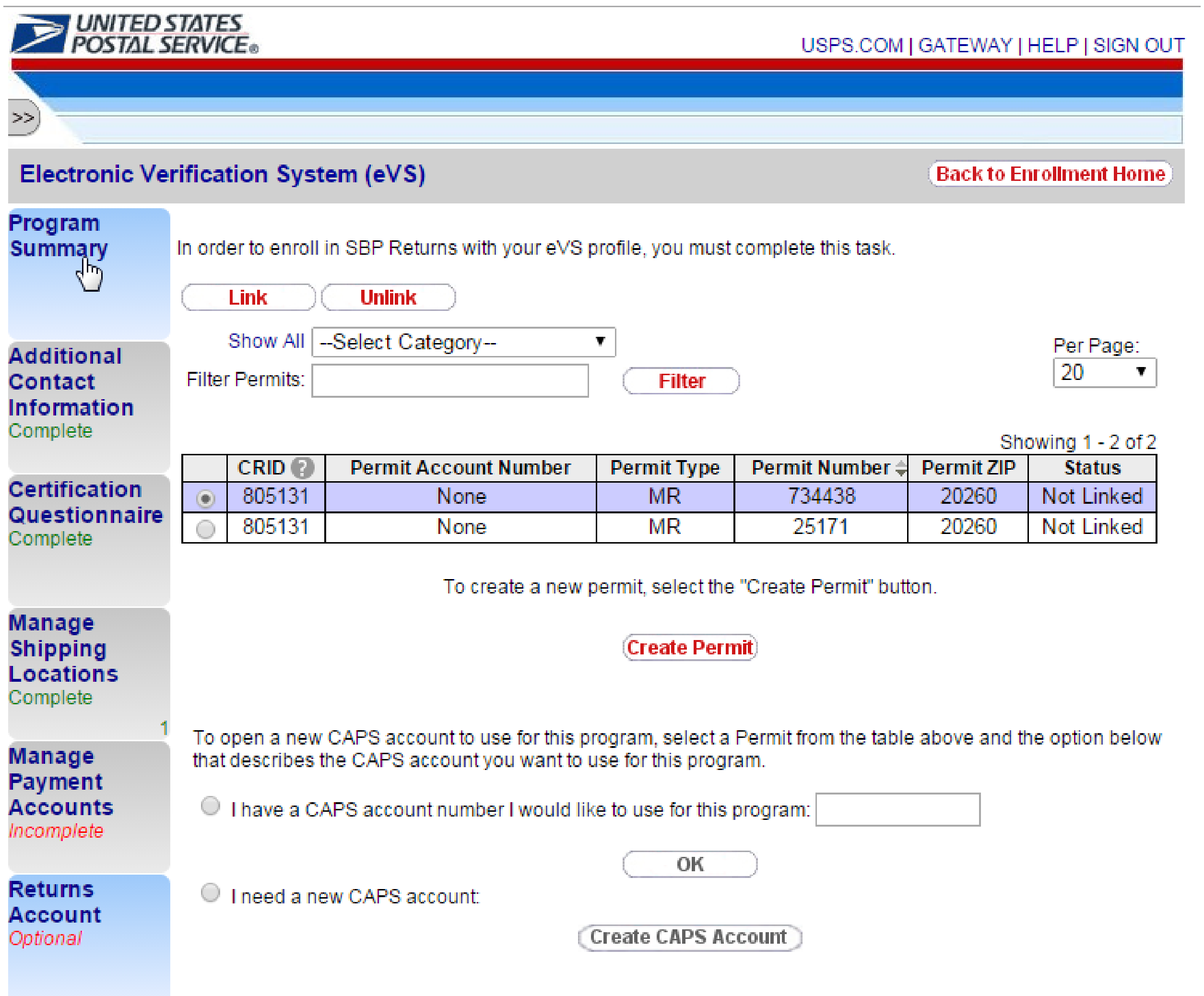


Figure 20.1 – Returns Account

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.

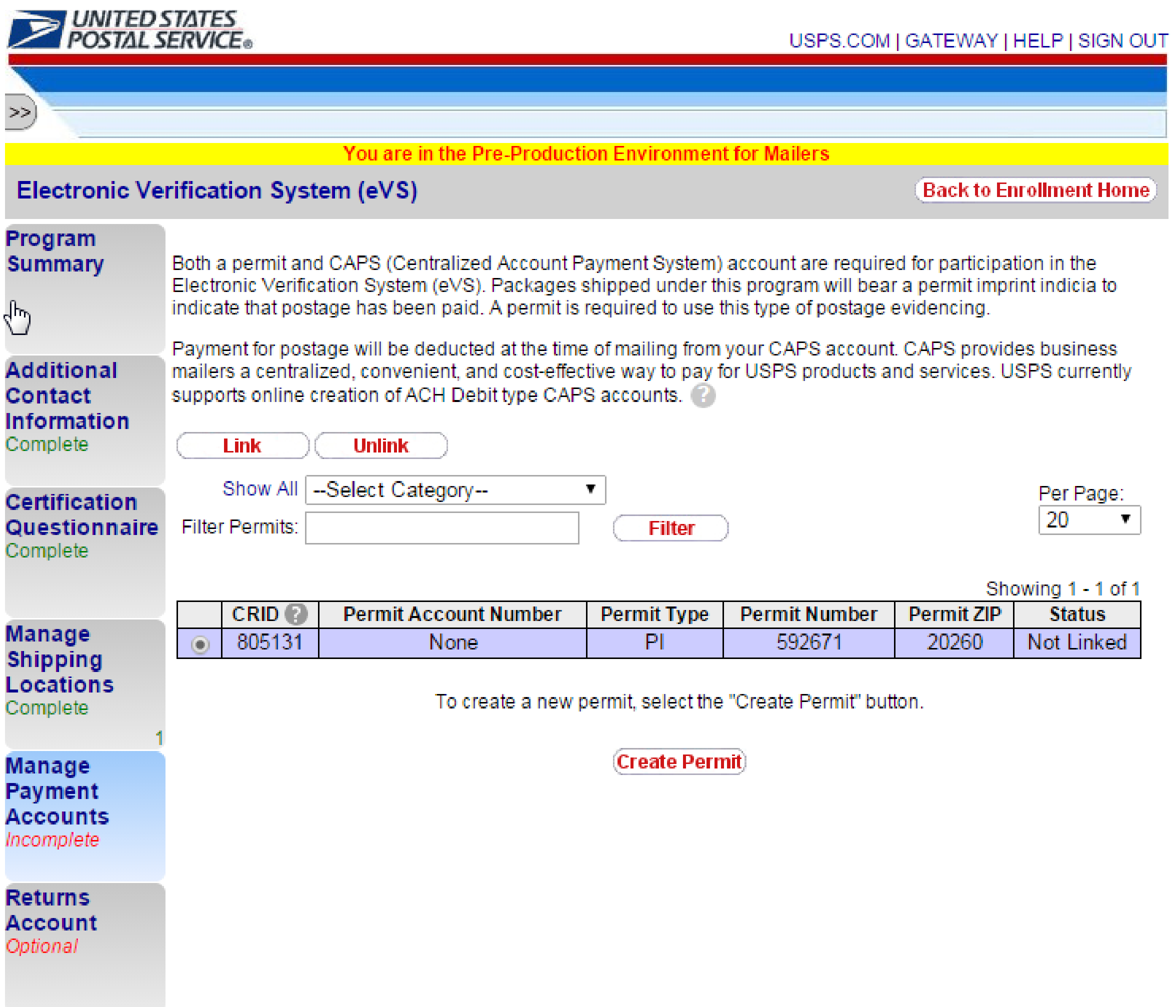


Figure 20.2 – Pre-Prod Returns Accounts

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 sing up. The page shows all of the available APIs with corresponding statuses for a user.

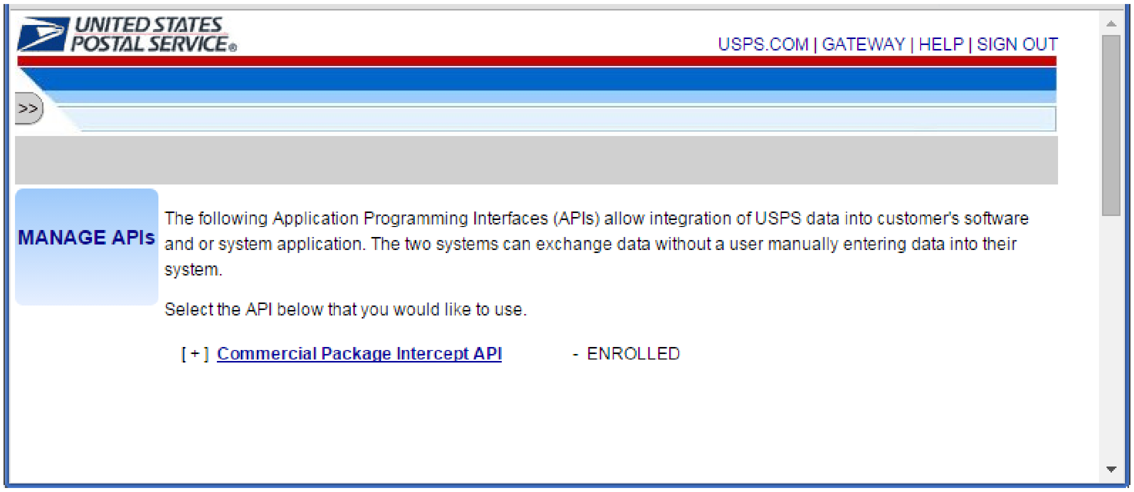


Figure 21.1 – Manage API home page

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”.
- <u>A “+” symbol next to each API name will expand and display a detailed description of the API.</u>
- 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.

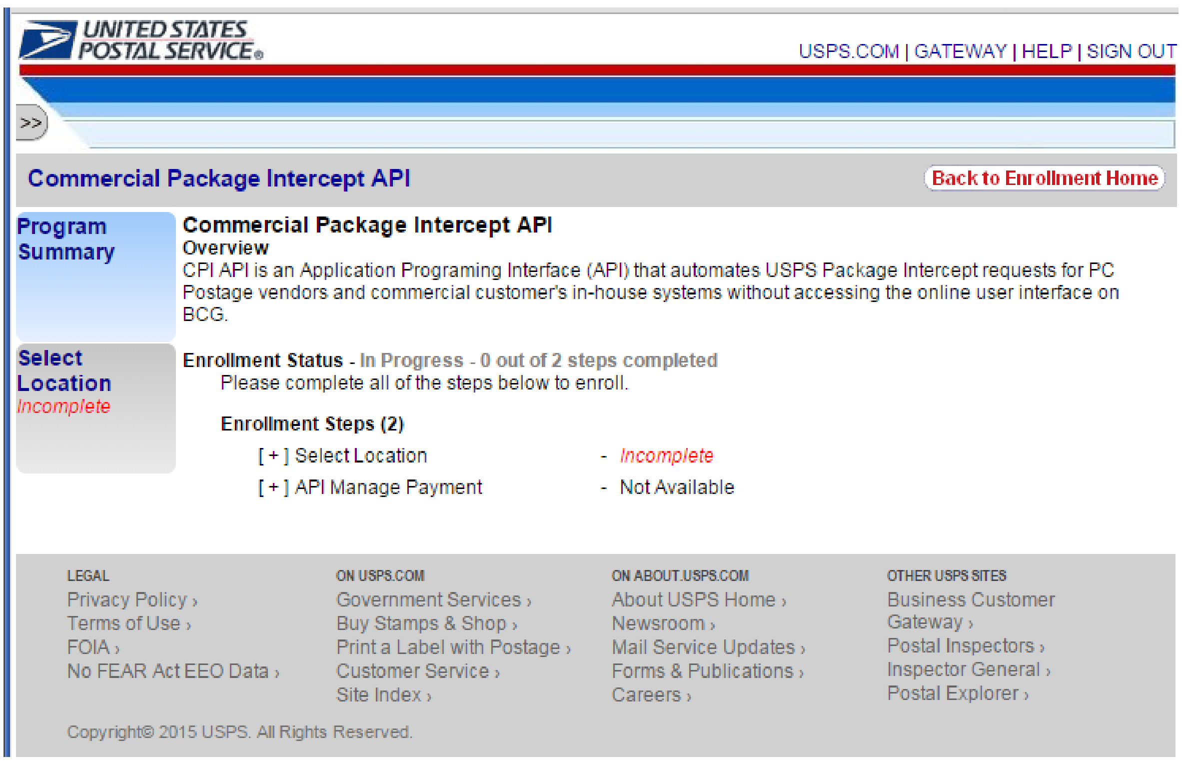


Figure 22.1 –API Summary home page – new enrollment

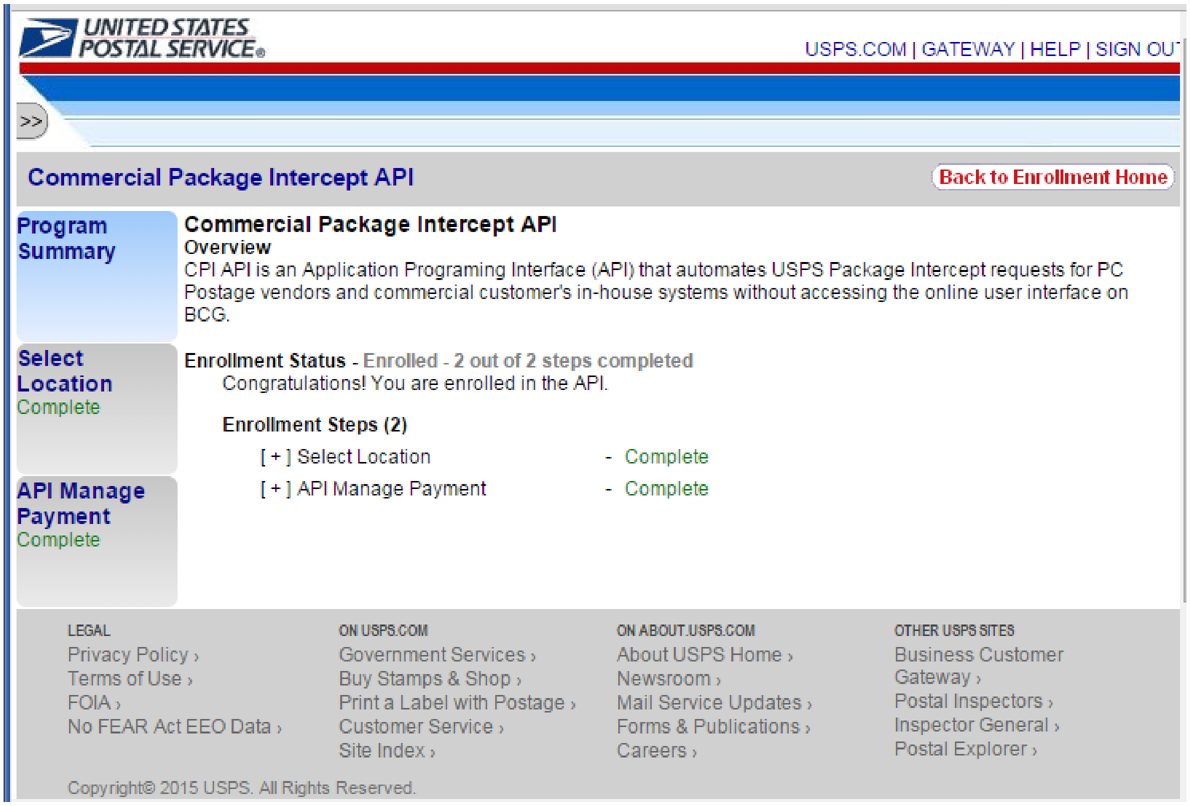


Figure 22.2 –API Summary home page – Complete enrollment.

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.

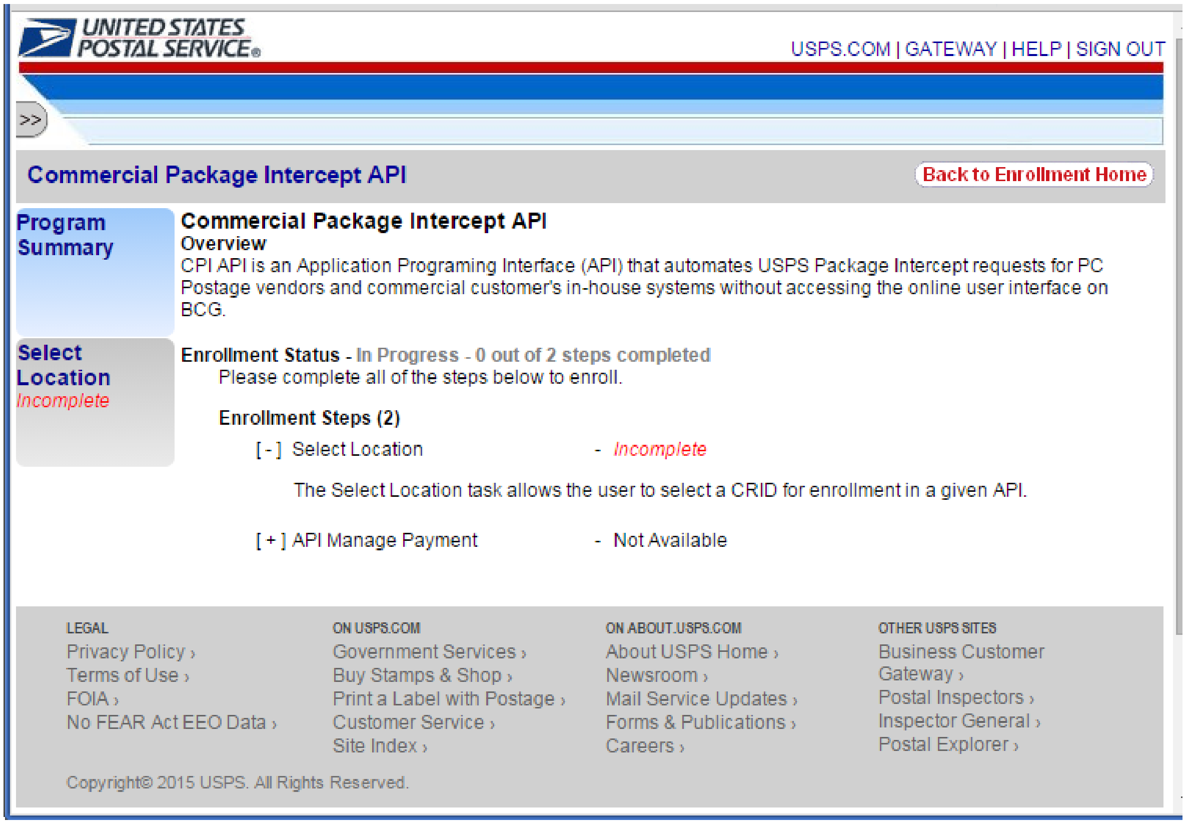


Figure 22.3 –API Summary home page.

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.

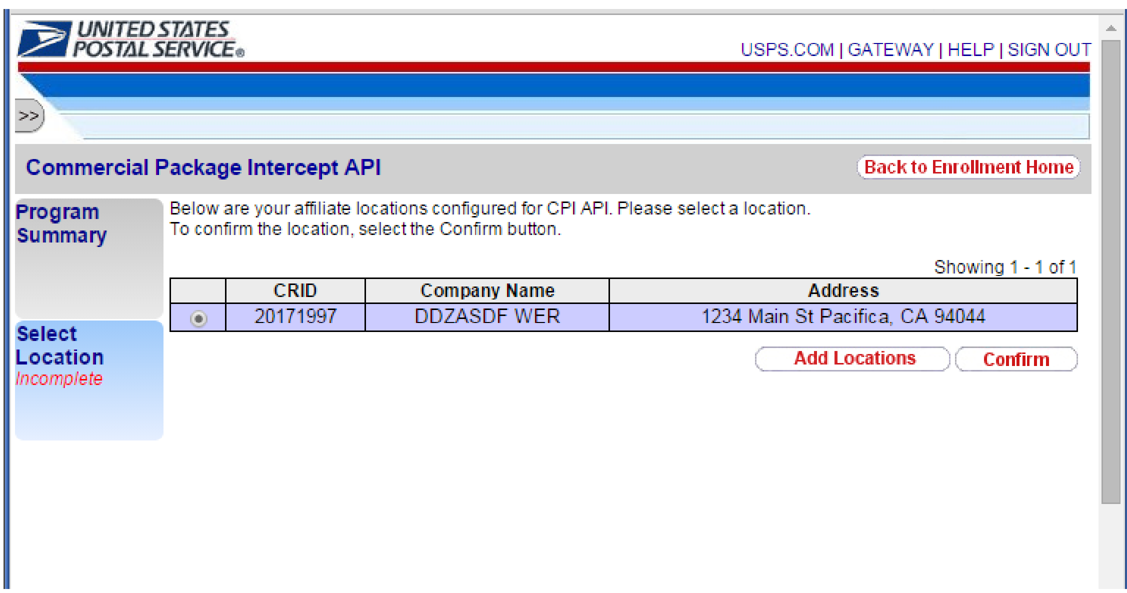


Figure 23.1 - Select Location - Data table displays – enrollment in progress

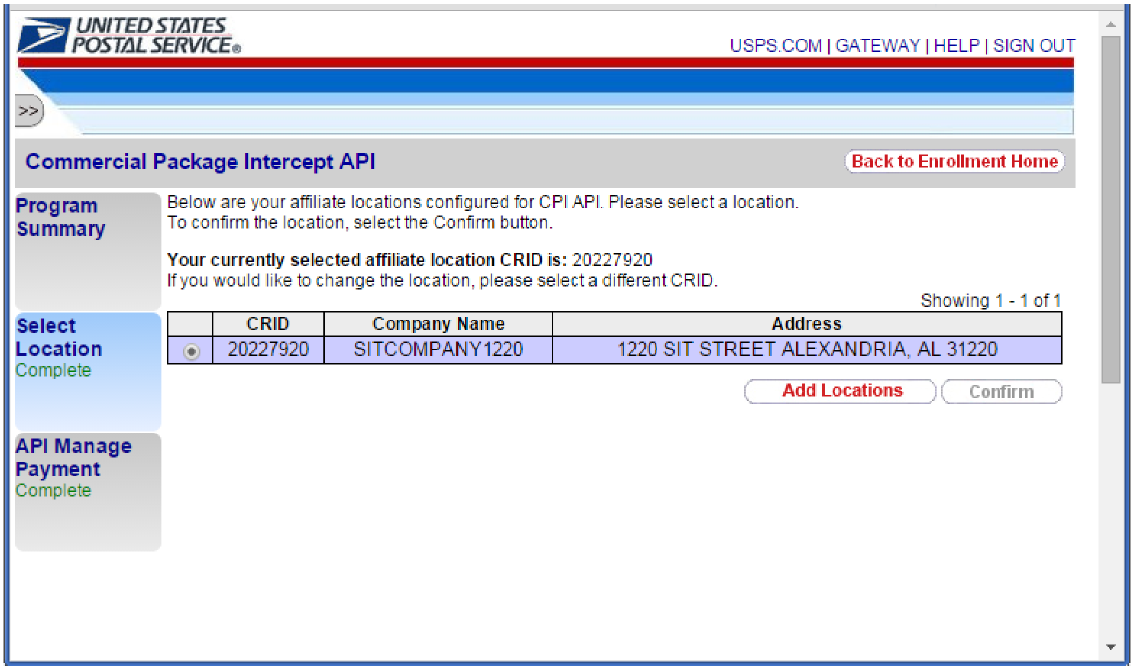


Figure 23.2 - Select Location - Data table displays – review/update completed enrollment

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.

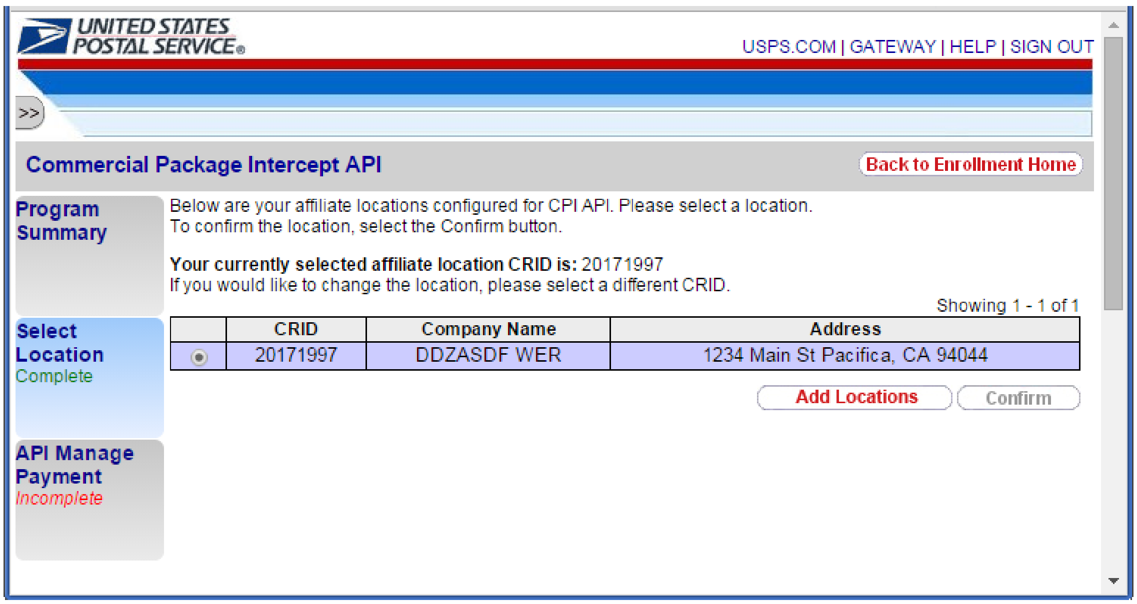


Figure 24.1 – After Completing Select Location Task, API Manage Payment task is displayed.

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).

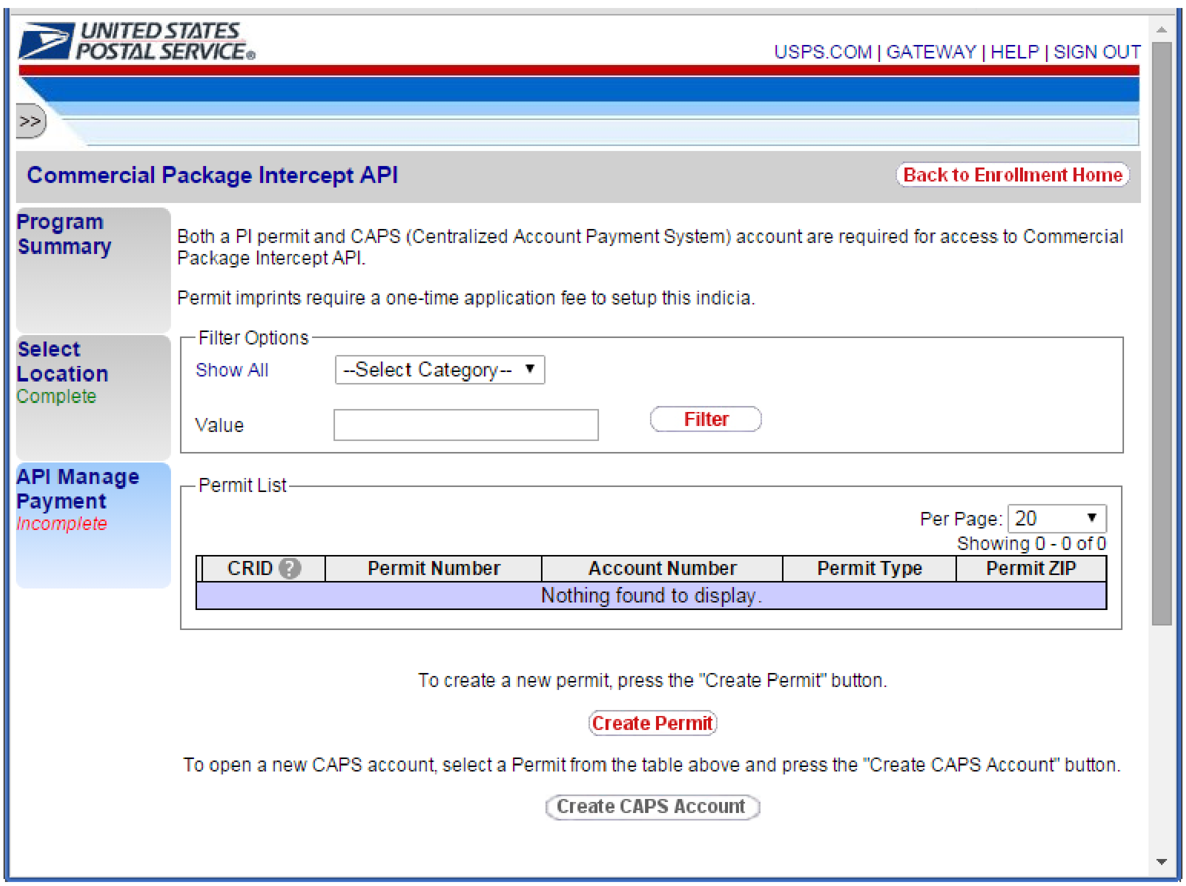


Figure 24.2 – no permits /CAPS accounts available.

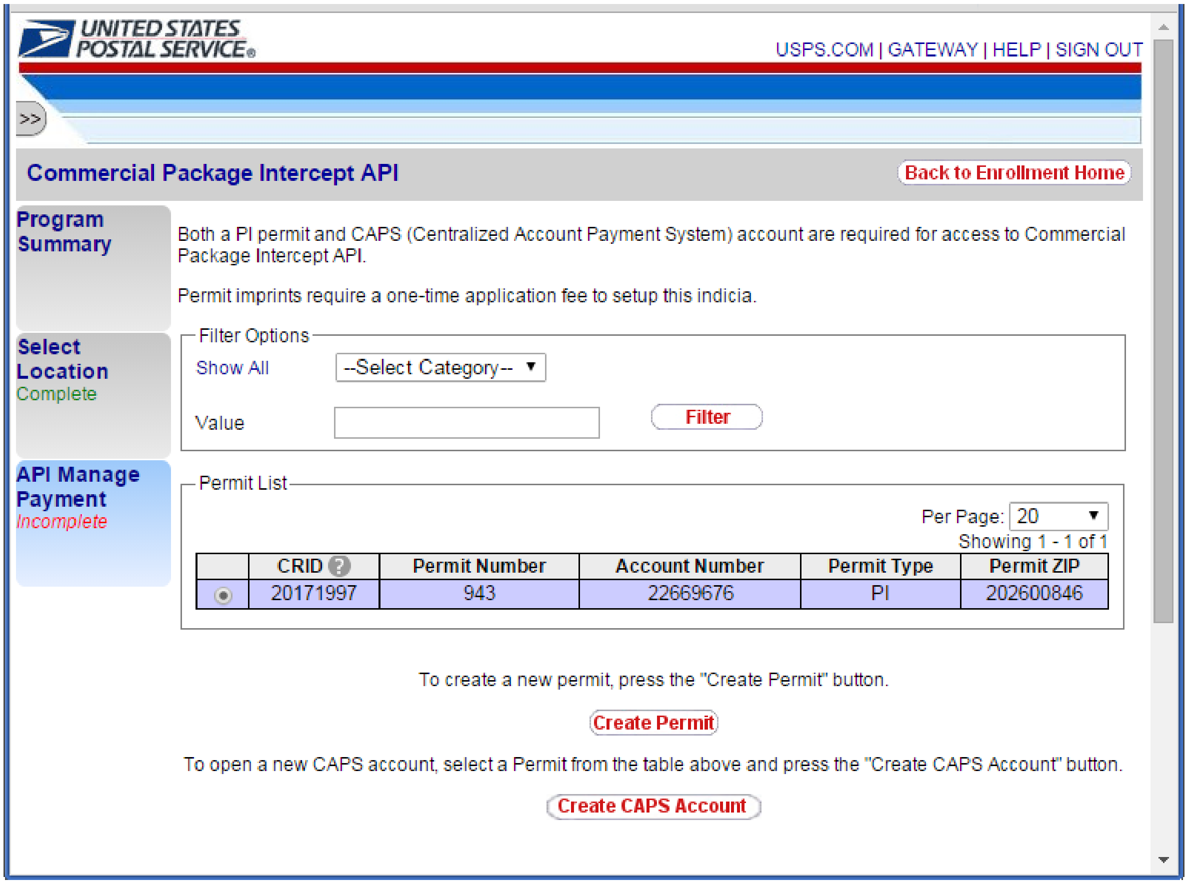


Figure 24.3 – Screen after user requested to create a permit.

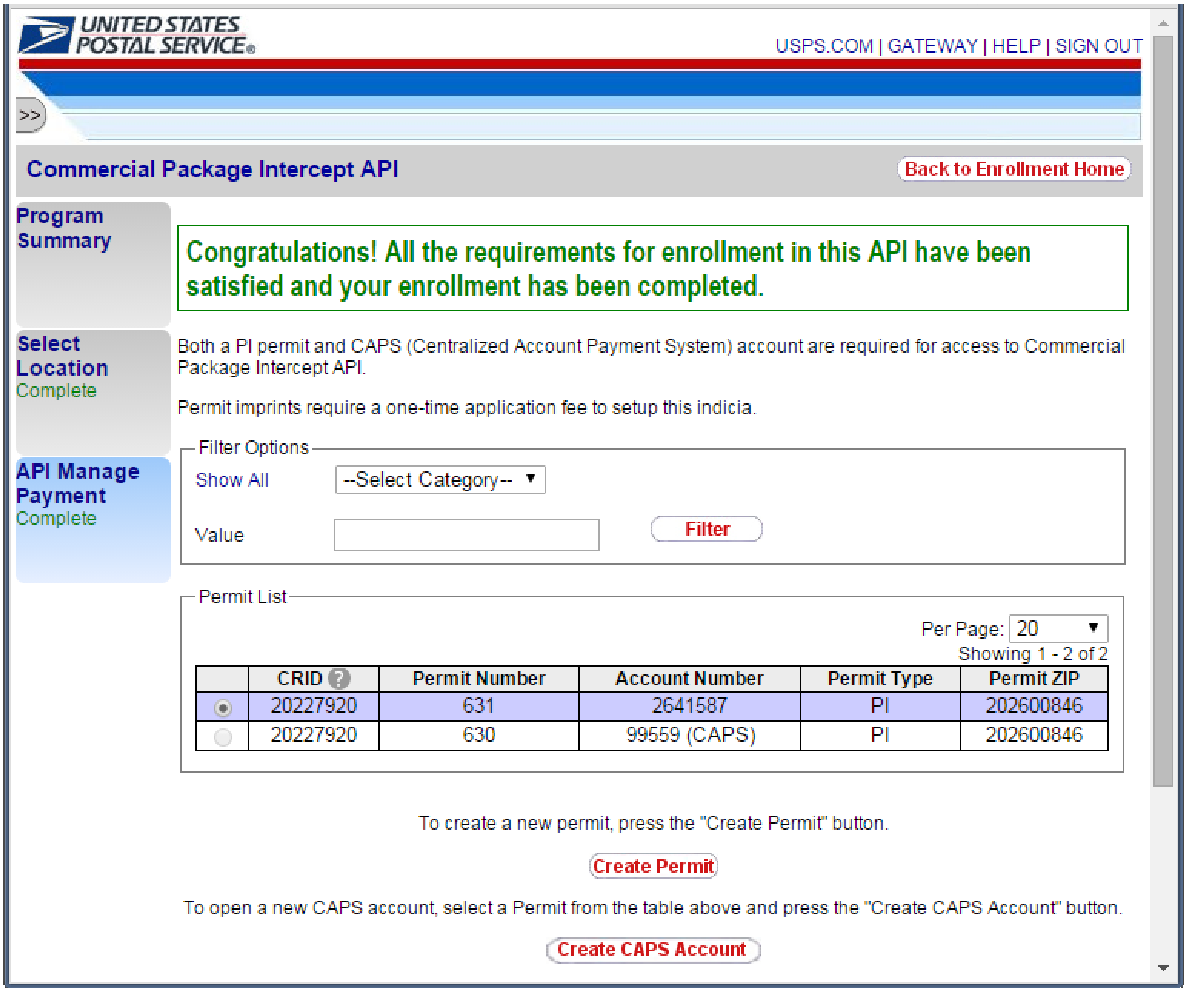


Figure 24.4 – API Manage Payment is complete.

24.3.2. Exceptions/Special Scenarios

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

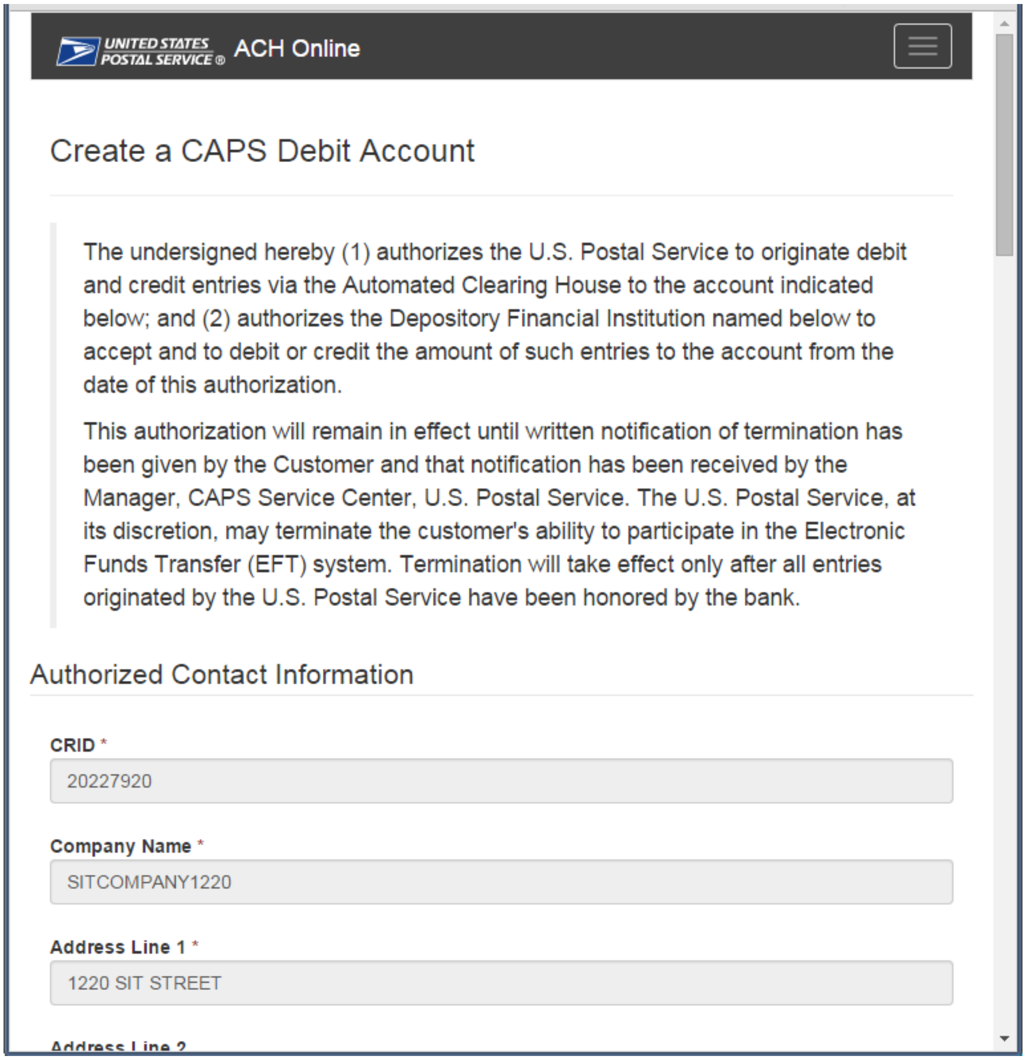


Figure 24.5 – ACH screen to create new CAPS account.

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.