



Program Registration
Pre-Prod: Incentives Enrollment
User Guide

May, 2015
Version: 2.0

Document Change History

Section	Title	Description
All	Incentive User Guide	Initial Draft
Introduction		Updated RIBBS links to 2014 for Incentives and PostalOne!

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Introduction

The purpose of this user guide is to walk you through the enrollment process for incentive services in the Pre-Production environment.

Finding additional information

The following documentation may also be useful and provide up to date information.

- Promotions and Incentive Programs documentation on RIBBS
<https://ribbs.usps.gov/index.cfm?page=mailingpromotions>
- May 2015 Release 41 Postal Service Technical Specifications
https://ribbs.usps.gov/intelligentmail_schedule2015/releases/may2015/techspecs.cfm
- May 2015 *PostalOne!* Release Notes
https://ribbs.usps.gov/intelligentmail_schedule2015/releases/may2015/releasenotes.cfm
- Incentive Programs Service User Guide (for Mail Owners)
<https://ribbs.usps.gov/index.cfm?page=mailingpromotions>
- Business Customer Gateway User Access Guides
https://ribbs.usps.gov/intelligentmail_guides/documents/tech_guides/user_access/user_access.htm

1.1 Additional Assistance

For Business Customer Gateway enrollment assistance contact the *PostalOne!* Customer Care Center at (800) 522-9085 or postalone@email.usps.gov.

1.2 Document Conventions

For further information, icons navigate you to the Troubleshooting  and FAQ sections of this guide by the Ctrl + click feature.

1.3 Key Terminology

Business Customer Gateway (BCG): Web portal for **USPS**[®] business services <http://gateway.usps.com>

Customer Registration ID (CRID): A unique ID for a company name and location combination. The CRID is automatically assigned when you select a Business Account.

Business Service Administrator (BSA): An individual that can approve or deny a user's access to participate in services on behalf of a company. The first person to request access to a service from your company will be prompted to become the BSA. In order to gain access to the service someone must assume the BSA role.

New Business Customer Gateway (BCG) Users

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

Note: Accessing and enrolling in the Pre-Production Environment for Incentives requires a Business Customer Gateway (BCG) account.



Figure 1: Register for Free

3. Create a user name, password and two security questions, name and contact info

They are case-sensitive and cannot include your username or more than two repeat characters in a row.

*First Security Question
Select First Question

*Second Security Question
Select Second Question

Your Answer
Answers are not case-sensitive.

Your Answer
Answers are not case-sensitive.

Re-Type Your Answer

Re-Type Your Answer

Re-Type Your Answer

Next, we need your name and contact info

* Indicates a required field

Enter Your Name

Title
Select

*First Name

M.I.

*Last Name

Suffix
Select

Enter Your Phone

*Type
US

*Phone

Ext.

Type
US

Fax

Enter Your Email Address

*Enter Your Email Address

*Re-Type Your Email Address

Can we contact you?
Get communications from USPS and our partners.

FROM USPS

FROM USPS PARTNERS

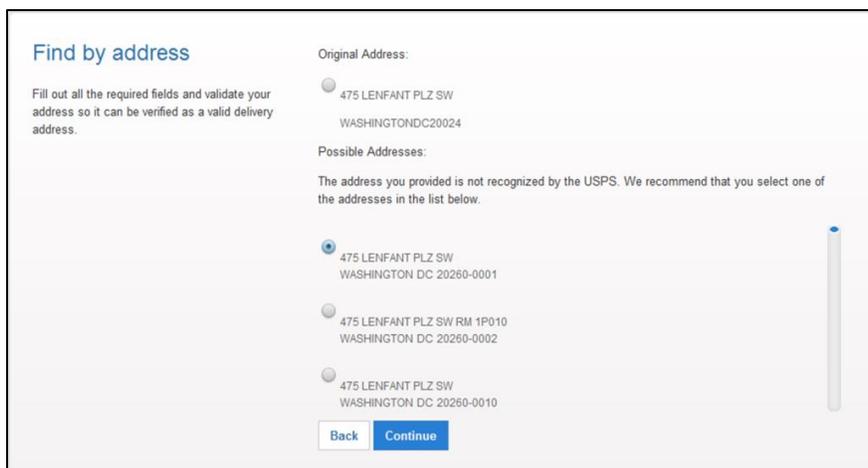
Figure 2: Create User Name, Password, Name and Contact Info

4. Choose a method to enter business location and enter appropriate information



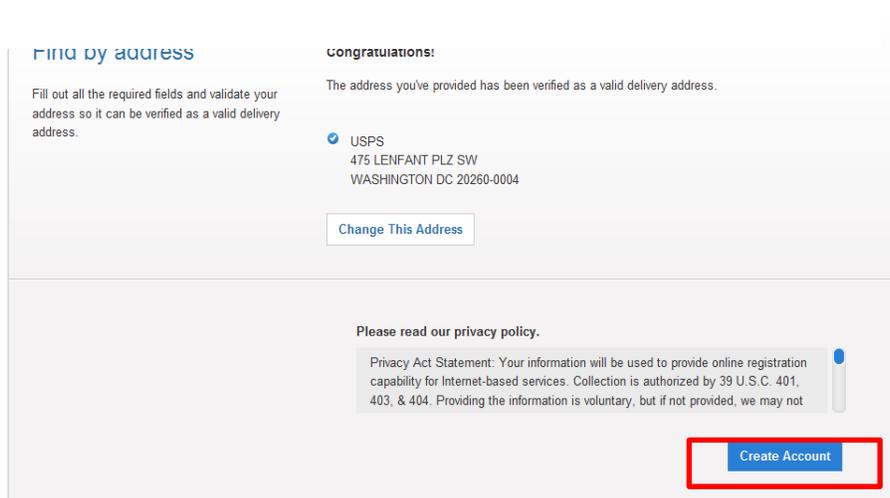
Figure 3: Choose Address, ZIP Code, or Company Identifier

5. Choose from list of possible addresses or original entry if necessary. After reviewing the Privacy Policy, click on “Create Account” and a confirmation email will be sent to the email address you provided.



The screenshot shows a web interface titled "Find by address". On the left, there is a text box with instructions: "Fill out all the required fields and validate your address so it can be verified as a valid delivery address." On the right, under "Original Address:", there is a radio button selected next to "475 LENFANT PLZ SW WASHINGTONDC20024". Below that, under "Possible Addresses:", there is a message: "The address you provided is not recognized by the USPS. We recommend that you select one of the addresses in the list below." There are three radio buttons with corresponding address suggestions: "475 LENFANT PLZ SW WASHINGTON DC 20260-0001" (selected), "475 LENFANT PLZ SW RM 1P010 WASHINGTON DC 20260-0002", and "475 LENFANT PLZ SW WASHINGTON DC 20260-0010". At the bottom, there are "Back" and "Continue" buttons.

Figure 4: Choose an Address



The screenshot shows the same "Find by address" page, but now with a "Congratulations:" message: "The address you've provided has been verified as a valid delivery address." The radio button for "USPS 475 LENFANT PLZ SW WASHINGTON DC 20260-0004" is selected. Below this is a "Change This Address" button. At the bottom, there is a "Please read our privacy policy." section with a scrollable text area containing a "Privacy Act Statement: Your information will be used to provide online registration capability for Internet-based services. Collection is authorized by 39 U.S.C. 401, 403, & 404. Providing the information is voluntary, but if not provided, we may not...". A "Create Account" button is highlighted with a red rectangle.

Figure 5: Create Account

You will be given access to Incentive Programs as part of the core suite of USPS Business Services referenced mid-page.

6. Clicking “Continue” will take you to a confirmation page.

You're signed up!

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

You now have access to the services that cover basic business functionality. Having access to a service means that you can see and use it freely. Depending on your company's needs, different employees may need access to different services. The access is regulated by the Business Service Administrator (BSA) of each service.

 **Your Business Location:**

ALI'S COMPANY
123 MAIN STREET
NEW YORK, NY 10022
UNITED STATES

CRID  : 20170616

[ADD A LOCATION](#) 

 We have automatically assigned you a **Mailer ID (MID): 900008344** 

 **Is this location a Mail Service Provider (MSP)?** 

Yes

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

SERVICE
Customer Label Distribution System (CLDS) - Order bulk, collated or DMM labels online.
Customer/Supplier Agreements (CSAs) * - CSAs define mail preparation requirements and acceptance times. 
Electronic Verification Service (eVS) * - Package mailers can use an electronic manifest to document and pay postage. 
Every Door Direct Mail - EDDM is designed to help you reach every home, every address, every time.
Incentive Programs * - Participate in promotions and incentives for business mail. 
Intelligent Mail Small Business (IMsb) Tool - Produce the IMb for your mailings.
Mailer ID * - Request and manage Mailer IDs. 
Manage Mailing Activity * - Manage your business mailings. 
Online Enrollment * - Get started online to apply for eligibility. 
Parcel Return Service (PRS) * - Work share solution for returning merchandise. 
Scan Based Payment (SBP) * - Scanning = revenue collection. 
Schedule a Mailing Appointment (FAST) * - Schedule a mailing appointment. 
USPS Package Intercept * - Redirect your mailpiece if it hasn't been delivered. 

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

[Continue](#)

Figure 6: List of Services

- 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.

Steps for Existing Business Customer Gateway (BCG) Users

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

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

Note: You will be able to use your production user name and password to access incentive programs.

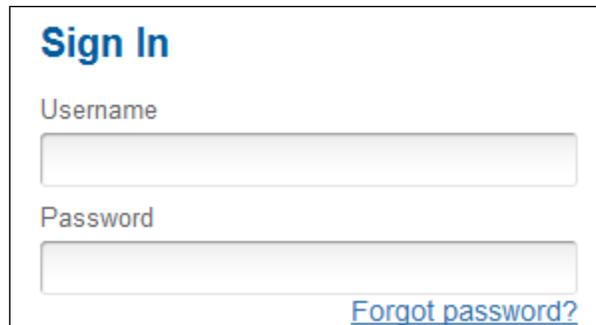
A screenshot of a web form titled "Sign In". The form contains two input fields: "Username" and "Password". Below the "Password" field is a blue hyperlink labeled "Forgot password?". The entire form is enclosed in a thin black border.

Figure 7: Sign In screen

3. From the Welcome page, click on "Manage Account" on the left-hand navigation tab.
4. Click on "Add Location" on the Manage Profile page if you want to add another location to your existing account.

Manage Profile | Manage Preferences | Manage Services | Manage Locations | Manage Users

Manage Profile

User: [EDIT PROFILE](#)

NIVA SIMPSON
tanya.m.perry@usps.gov
(202) 222-0940

Display contact info to users requesting your approval for services:

- Name
- Phone
- Email

Home Business Location: [TERMS AND CONDITIONS](#)

JOSH HOSUE
4550 LANCASTER DRIVE
FT. WASHINGTON, MD 20744
UNITED STATES

CRID ⓘ : 94544330
MID ⓘ : [View your Mailer IDs](#)

Add a Business Location [ADD A LOCATION](#)

Does your business have more locations? Click to add additional locations to your account.

Favorite Services ⓘ

- DASHBOARD
- MAILER ID
- MAILING REPORTS
- ONLINE ENROLLMENT
- POSTAL WIZARD

[EDIT FAVORITES](#)

Figure 8: Add New Location to existing Profile

5. For a new business location, enter business name and address and click “Search”.
6. For an existing location, enter your CRID and click “Continue”.

Figure 9: Add New Location to existing Profile

7. The system will return a list of similar addresses. Select the radio button on the right that matches your new location and click on “Continue”.
8. If you cannot find the right address, click “Use this address as you entered it” link.

Add Location
[CANCEL ADD LOCATION](#)


Adding new location

We have found several addresses that are similar to the one you entered. Please choose the correct address to continue.

Here is the address you entered:
 475 L'ENFANT PLAZA, WASHINGTON, DC 20260, UNITED STATES [Edit](#)

Please find the address below, select it and press continue.

ADDRESS	CITY	STATE/PROVINCE	ZIP CODE	SELECT
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW RM 1P010	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>
475 LENFANT PLZ SW	WASHINGTON	DC	20260	<input type="radio"/>

Can't find the right address? [Use this address as you entered it](#)

Continue

Figure 10: This page displays only for new business locations

9. Confirm your business location by clicking on “Confirm Add Location”.

Add a Location
CANCEL ADD LOCATION

* Indicates a required field



Confirm new Business Location.

You are almost done adding a new Business location to your account. Review the information below and press Confirm Add Location to finish adding your new Business location.

This is the address you searched for:

USPS
475 LENFANT PLZ SW
WASHINGTON, DC 20260
UNITED STATES

You will become a user at this business location:

TESTERS R US
475 LENFANT PLZ SW
WASHINGTON, DC 20260-0010
UNITED STATES

CRID ⓘ : 94540244

For your new location, you will be given permission to use several [USPS Business Services](#).

If you are the first user requesting a service for your location, you will become the **Business Service Administrator (BSA)** of that service; you will be responsible for managing that service for any future users, controlling who can and cannot use it at your business location.

Search Again
Confirm Add Location

Figure 11: Confirm Add New Location

Add a Location
CANCEL ADD LOCATION

* Indicates a required field



Confirm new Business Location.

You are almost done adding a new Business location to your account. Review the information below and press Add Location to finish adding your new Business location.

You will become a user at this business location:

TESTERS R US
475 LENFANT PLZ SW
WASHINGTON, DC 20260-0010
UNITED STATES

CRID ⓘ : 94540244

For your new location, you will be given permission to use several [USPS Business Services](#).

If you are the first user requesting a service for your location, you will become the **Business Service Administrator (BSA)** of that service; you will be responsible for managing that service for any future users, controlling who can and cannot use it at your business location.

Search Again
Confirm Add Location

Figure 12: Existing Business Location

10. The core suite of USPS Business Services includes Incentives. Select the radio button and press “Continue with Selection”.

Add a Location

* Indicates a required field

 **Confirm new Business Location.**
You have just added the business location below to your account. You may now select business services to use at your new location.

 **Your New Business Location**
TESTERS R US
475 LENFANT PLZ SW
WASHINGTON, DC 20260-0010
UNITED STATES
CRID ⓘ : 94540244

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

I'd like to be given the core suite of [USPS Business Services](#). (Recommended)

I'd like to custom select services for my Business Location.

Figure 13: Add Services for Business Locations

11. The core suite of services may be found by clicking the USPS Business Services link which includes Incentive Programs.

12. If you choose to custom select a service, be sure to check the Incentive Programs box.

 **Add Services for your Business Location**

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

I'd like to be given the core suite of [USPS Business Services](#). (Recommended)

With these services, you'll be able to:

- Prepare, track and monitor your mailings
- Manage Mailer IDs and Permits
- Simplify Full Service Mailing and Customer Returns
- Target Areas with Direct Mail
- Send and Manage Large Shipments
- Order Mailing and Shipping Labels
- Enroll for Shipping Services
- Generate Mail and Transaction History reports
- Stay On Top of USPS Promotions and Incentive Programs

I'd like to custom select services for my Business Location.

[CONTINUE WITH SELECTION](#)

Figure 14: Add Core suite of Services

 **Add Services for your Business Location**

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

I'd like to be given the core suite of [USPS Business Services](#). (Recommended)

I'd like to custom select services for my Business Location.

*Select at least one service to continue.

Basic Services

- Incentive Programs:** Participate in promotions and incentives for business mail.
- Mailer ID :** Request and manage Mailer IDs.
- Manage Mailing Activity:** Manage your business mailings.

Mailing Services

- Customer Label Distribution System (CLDS):** Order bulk, collated or DMM labels online.
- Customer/Supplier Agreements (CSAs):** CSAs define mail preparation requirements and acceptance times.
- Every Door Direct Mail:** EDDM is designed to help you reach every home, every address, every time.
- Intelligent Mail Small Business (IMsb) Tool:** Produce the IMb for your mailings.
- Schedule a Mailing Appointment (FAST):** Schedule a mailing appointment.

Shipping Services

- Parcel Return Service (PRS) :** Work share solution for returning merchandise.
- Electronic Verification Service (eVS):** Package mailers can use an electronic manifest to document and pay postage.
- Online Enrollment:** Get started online to apply for eligibility.
- Scan Based Payment (SBP):** Scanning = revenue collection.
- USPS Package Intercept:** Redirect your mailpiece if it hasn't been delivered.

Shipping Service - EMSP

- Electronic Manifesting Solution for Packages (EMSP):** End-to-end solution for small businesses to address their package needs.

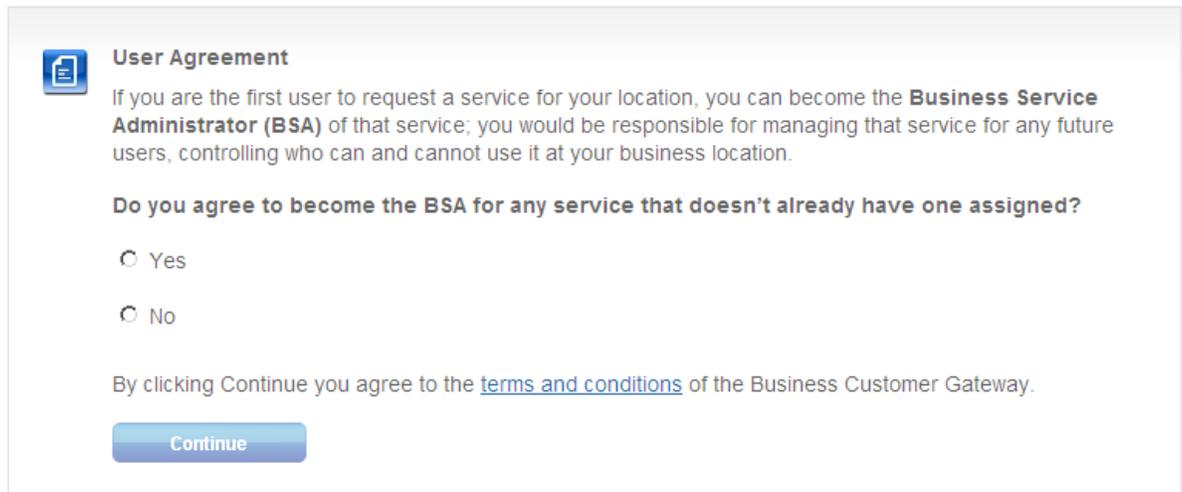
Other Services

- Audit Mailing Activity (PostalOne!):** Access your permit or Publication account.
- Mail Transport Equipment Ordering System (MTEOR):** Order Mail Transport Equipment.
- Logistics Condition Reporting System (LCRS):** Visibility into the transportation and logistics network.
- Verification Assessment Evaluator (PostalOne!):** Receive reconciliation and refund notifications.

[CONTINUE WITH SELECTION](#)

Figure 15: Select Incentive Programs

13. You might have the option to become the Business Service Administrator (BSA) for a USPS business application or service that does not currently have a BSA assigned.
14. Clicking “Continue” takes the user to a confirmation page.



 **User Agreement**

If you are the first user to request a service for your location, you can become the **Business Service Administrator (BSA)** of that service; you would be responsible for managing that service for any future users, controlling who can and cannot use it at your business location.

Do you agree to become the BSA for any service that doesn't already have one assigned?

Yes

No

By clicking Continue you agree to the [terms and conditions](#) of the Business Customer Gateway.

Figure 16: Request for BSA

15. Business location was successfully added to your account. You can now view a list of services you have access to, including Incentive Programs.
16. Clicking “Continue” will return you to the Manage Account page

Search Confirm Success

Add Location

You have successfully added your Business Location.

Review the status of your service access below. Having access to a service means that you can see and use it freely. Depending on your company's needs, different employees may need access to different services. The access is regulated by the Business Service Administrator (BSA) of each service.

Your New Business Location:

AL'S COMPANY
123 MAIN STREET
NEW YORK, NY 10022
UNITED STATES

CRID [?](#) : 94550998

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

Yes

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

SERVICE
Customer/Supplier Agreements (CSAs)* - CSAs define mail preparation requirements and acceptance times. ?
Electronic Verification Service (eVS)* - Package mailers can use an electronic manifest to document and pay postage. ?
Incentive Programs* - Participate in promotions and incentives for business mail. ?
Mailer ID* - Request and manage Mailer IDs. ?
Manage Mailing Activity* - Manage your business mailings. ?
Online Enrollment* - Get started online to apply for eligibility. ?
Parcel Return Service (PRS)* - Work share solution for returning merchandise. ?
Scan Based Payment (SBP)* - Scanning = revenue collection. ?
Schedule a Mailing Appointment (FAST)* - Schedule a mailing appointment. ?
USPS Package Intercept* - Redirect your mailpiece if it hasn't been delivered. ?

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

Add Another Location
Continue

Figure 17: Added Business Location Successfully

Login to the Pre-Production Environment

1. From the Mailing Services page, select Incentive Programs.

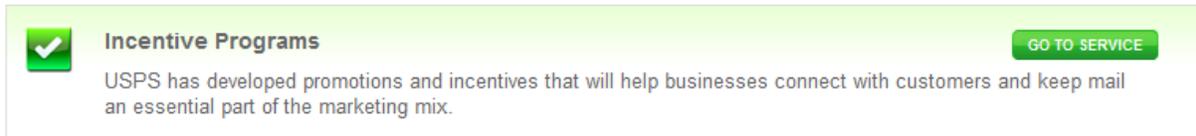


Figure 17: Incentive Programs

2. On the Incentives Home page click on the Pre-Prod/Test Environment tab.

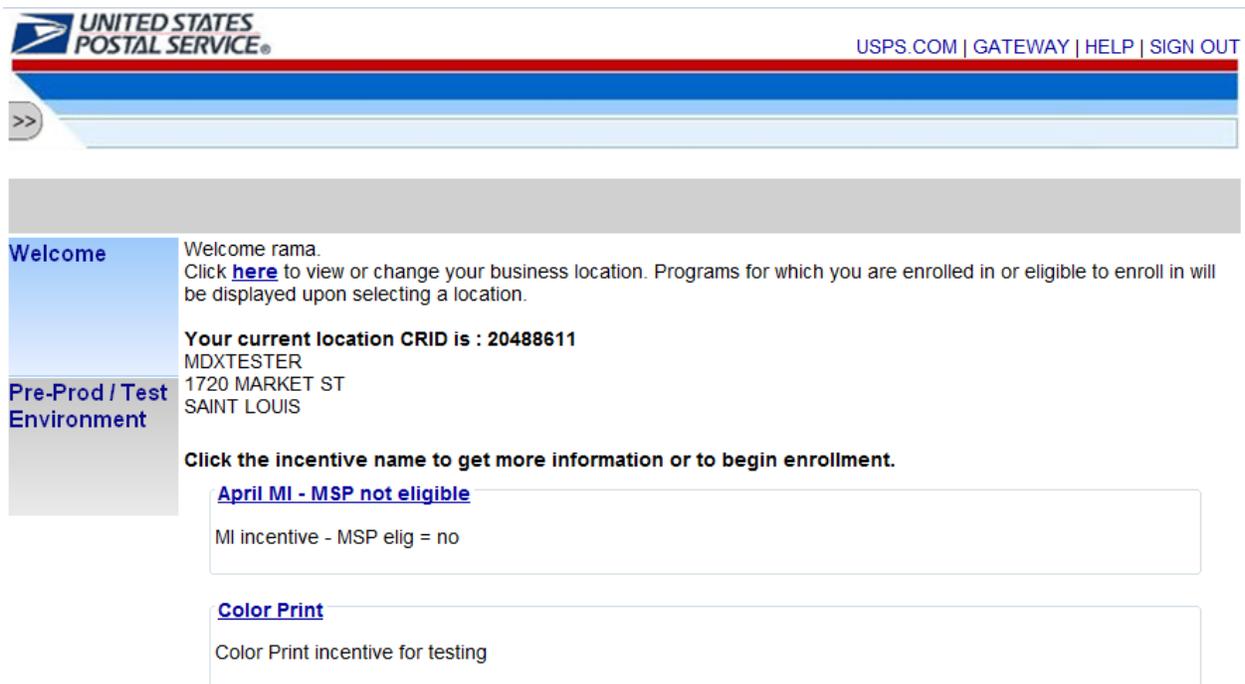


Figure 18: Select Pre-Prod/Test Environment

3. To navigate to the pre-production environment click on the “Here” hyperlink. The system will navigate to the incentives home page.

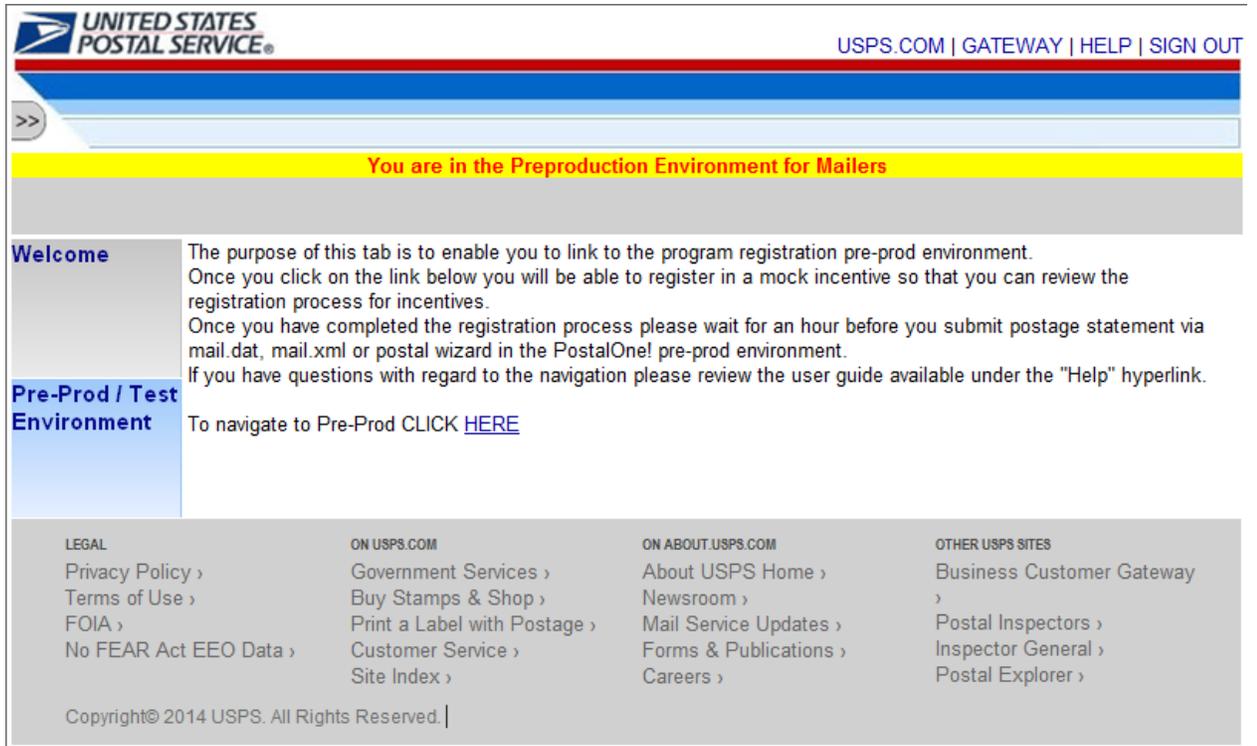


Figure 19: Click on the 'HERE' hyperlink to log into Pre-Prod

4. The system will navigate to the Pre-production Incentives Landing page.

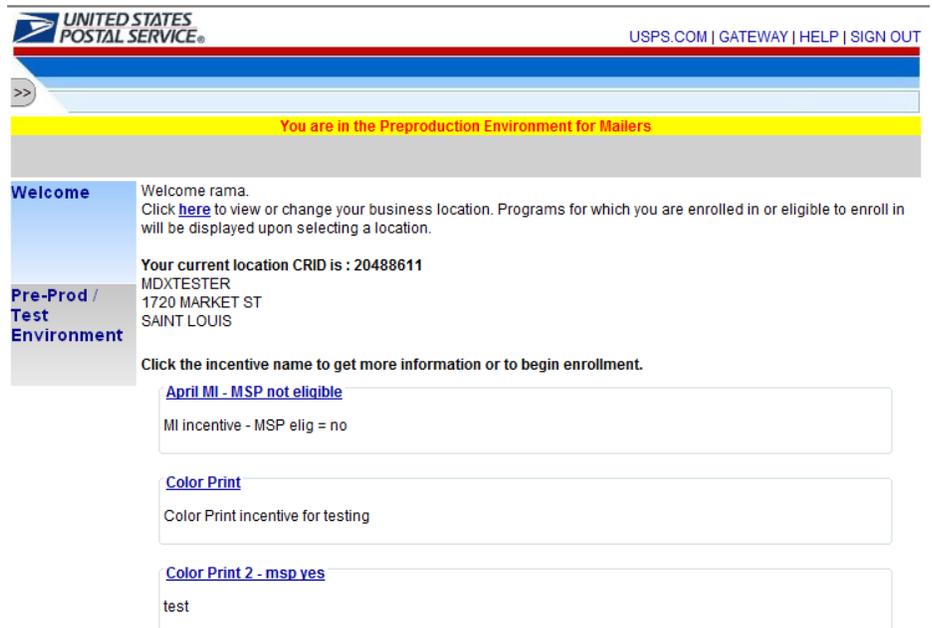


Figure 20: Incentives Home Page

Begin Enrollment

1. Select any Incentive Program that you would like to test with.

UNITED STATES POSTAL SERVICE®

USPS.COM | GATEWAY | HELP | SIGN OUT

You are in the Preproduction Environment for Mailers

Earned Value QTP 89933 [Begin Enrollment](#) [Back to Incentives Home](#)

Program Summary

Earned Value QTP 89933

Overview

Earned Value QTP long description.

▼ Hide Additional Information

Dates:

Period	Start Date	End Date
Registration Period	03/03/2014	04/30/2014
Incentive Period	03/03/2014	04/30/2014
Incentive Award Period 1	03/03/2014	04/30/2014
Mailer Agreement Period	03/04/2014	04/30/2014
Award Claim Period	03/03/2014	No End Date

Last Updated:
03/28/2014 11:56 AM

Figure 21: Incentive Program Selection

2. To begin enrollment into the selected Incentive Program, select the **Begin Enrollment** button located at the top right corner of the page.
3. Follow the Enrollment Tasks
4. As you complete each task, the system will display the task as "Complete". Some Enrollment tasks become available only after other tasks have been completed.

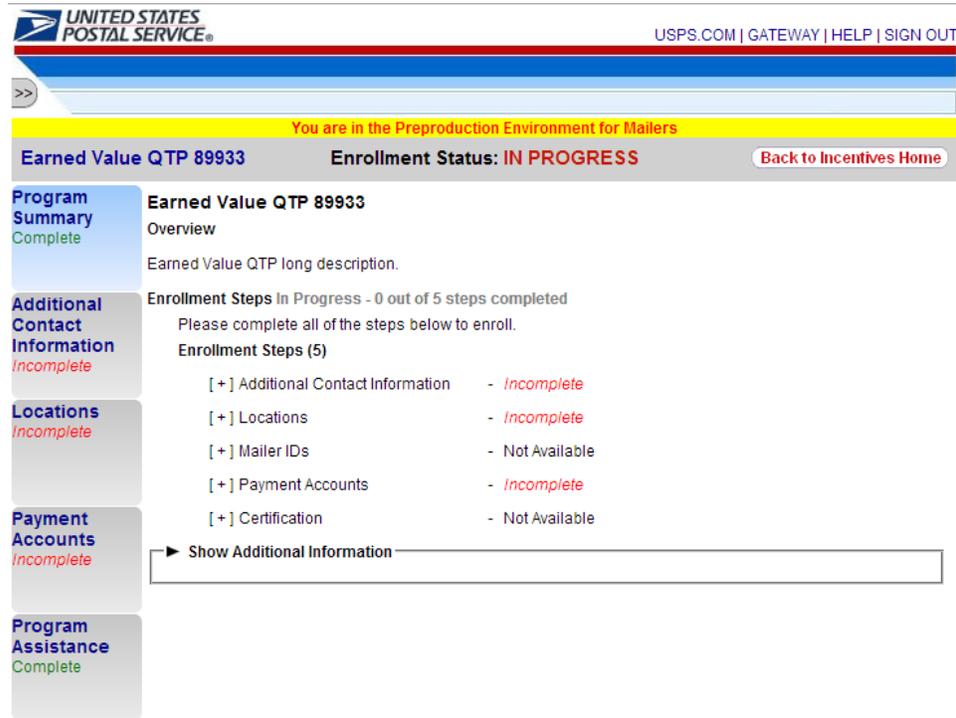


Figure 22

Figure 22

Figure 23: Enrollment Status - In Progress

5. Additional Contact Information Tab

The Additional Contact Information page allows you to save contact information for an alternative primary contact and for a technical contact. You are required to enter information for the alternative primary contact to complete this task.

6. Locations Tab

This task applies for both Earned Value and discount-based incentives. The Locations tab allows you to review your participating mailing locations. In the Pre-Production environment, you will be unable to change your MSP designation (applies to both available and unavailable locations, hence, why the <Edit> button is disabled). This functionality will be available only in the Production environment. You must verify the accuracy of the locations displayed and select the <I Agree> button to complete this task. This information will be displayed based on the locations you have access to in BCG.

The screenshot displays a web interface for managing company locations. At the top right, there is a 'Per Page' dropdown set to 20. Below this is a filter section with two dropdown menus: 'Filter --Select Table--' and 'by --Select Category--', followed by a text input field for 'for'. To the right of the filter fields are 'Filter' and 'Clear Filter' buttons. The main content is divided into two sections: 'Available Company Locations' and 'Unavailable Company Locations'. Each section contains a table with columns for Company, CRID, MSP Designation, Address, Enrollment Method, Enrollment Date, and Change MSP Designation. The 'Available' section shows one entry for 'UNITED STATES' with CRID 5030556 and address '605 5TH AVE S SEATTLE'. The 'Unavailable' section shows two entries: 'Post-Enrollment Loc' with CRID 4821337 and address '245 Pera st Lacer PA', and 'The Company of Mail' with CRID 5155336 and address '88 Eighty-Eight St Loretto MN'. Each row in both tables has an 'Edit' button in the 'Change MSP Designation' column. Below the tables, there are 'Export options: CSV | Excel | XML | PDF'.

Company	CRID	MSP Designation	Address	Enrollment Method	Enrollment Date	Change MSP Designation
UNITED STATES	5030556	YES	605 5TH AVE S SEATTLE			Edit

Export options: CSV | Excel | XML | PDF

Company	CRID	MSP Designation	Address	Enrollment Method	Enrollment Date	Change MSP Designation
Post-Enrollment Loc	4821337	YES	245 Pera st Lacer PA			Edit
The Company of Mail	5155336	NO	88 Eighty-Eight St Loretto MN			Edit

Figure 23: Available Company Locations

Post-Enrollment Changes

If you associate new locations to the Incentive Programs service after you have completed enrollment in a program, these locations will not be automatically enrolled in the program. To enroll these new locations in the programs for which you are already enrolled, you must select the Incentive Programs link as described in section 3.

You will want to enroll all CRIDs/locations for which there are eligible Mailer IDs (MIDs) you plan to use it for the Earned Value promotion. MIDs are not required for non-earned value incentives. If CRIDs are missing, the Mailer IDs associated to these CRIDs will not be enrolled in the program and you will not receive any credit for CRM/BRM volume associated to them. The system will NOT recognize the Mailer IDs as enrolled and will NOT track their volume.

Unavailable Company Locations

Shared business* locations may be Unavailable for enrollment when they have already been enrolled by another user. They are denoted with an asterisk (*). A business location is referred to as shared when it has been registered for the Incentive Program's service by multiple users.

*Shared business locations apply to earned value incentives.

You are in the Preproduction Environment for Mailers

Earned Value QTP 89933 **Enrollment Status: IN PROGRESS** [Back to Incentives Home](#)

Program Summary
Complete

Additional Contact Information
Complete

Locations
Incomplete

Payment Accounts
Incomplete

Program Assistance
Complete

Below are your business locations where your permits are linked. Each unique location is assigned to a different Customer Registration ID (CRID). If you haven't done so, select the 'I Agree' button to verify that you have reviewed your participating locations.

TIP 1: If a location is missing, click [here](#) to add the location to your Incentive Programs enrollment. You must then follow the "Refreshing Your Profile" steps.

TIP 2: If you are already enrolled and later add a new location, follow the steps under "Refreshing Your Profile".

Refreshing Your Profile

1. Log out by selecting the "SIGN OUT" link on the top right corner of the page.
2. Close your browser completely (i.e., Close all windows and/or tabs).
3. Log back into the [Business Customer Gateway](#) and navigate to the Incentive Program service by selecting the Incentive Programs link.
4. Navigate to the Locations tab. Under the Enrollment Method column, verify the word "Online" displays for the newly added location.

For more information regarding the data in the columns, place your cursor over the column title.

Per Page: 20 ▾

Filter by for [Filter](#)
[Clear Filter](#)

Available Company Locations: Showing 0 - 0 of 0

Company	CRID	MSP Designation	Address	Enrollment Method	Enrollment Date
Nothing found to display.					

Unavailable Company Locations: Showing 1 - 6 of 6

Company	CRID	MSP Designation	Address	Enrollment Method	Enrollment Date	
QUAD GRAPHICS SARATOGA SPRINGS	* 20400393	YES	56 DUPLAINVILLE RD SARATOGA SPGS NY			Edit
RR DONNELLEY DANVILLE	* 20400560	NO	3201 LEBANON RD DANVILLE KY			Edit
MOTION GRAPHICS ONE	* 20400572	YES	824 MIDWAY AVE SAN LEANDRO CA			Edit
QUAD GRAPHICS PEWAUKEE 123RAVI	* 20488602	YES	W223 N3484 DUPLAINVILLE ROAD Near PO PEWAUKEE WI			Edit
SelfServiceLB	* 20500318		824 MIDWAY AVE SAN LEANDRO CA			Edit
PYRITE SHIPPING	* 20506827		118 CARROL RD ST CHARLES IL			Edit

Export options: CSV | Excel | XML | PDF

[I Agree](#) [I Disagree](#)

Figure 24: Unavailable Company Locations

*The logged-in user shares some of their locations with another user who is already enrolled in the program. You will not get credit for CRIDs that have been previously registered by another user. Shared locations apply only to earned value incentives.

Mailer IDs Tab

This tab will appear only for the Earned Value Incentive. The Mailer IDs tab will only become available once the Locations tab has been completed. This page allows you to review your participating mailer IDs. You must verify the accuracy and completeness of the mailer IDs and select the <I Agree> button to complete this task.

Note: You will need to enroll all CRIDs/locations in which there are eligible Mailer IDs that you plan to use for the promotion. Only business locations that are registered for the Incentive Program's service will have their associated Mailer IDs displayed in the Mailer IDs tab.

You are in the Preproduction Environment for Mailers

Earned Value QTP 89933 **Enrollment Status: IN PROGRESS** [Back to Incentives Home](#)

Program Summary
Complete

Verify that your Mailer IDs are listed correctly and select the <I Agree> button below to complete this enrollment step. If one or more of your MIDs is missing, please click this link to the [Business Customer Gateway](#) and verify that the location to which the MID is linked is registered for the Incentive Programs service.

For more information regarding the data in the columns, place your cursor over the column title.

Additional Contact Information
Complete

Per Page: 20

Filter by for

Locations
Complete

Available Mailer IDs Showing 1 - 2 of 2

MID	Shared?	CRID	Street Address	City	State	ZIP Code	Tracking Request Date
900008040	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020	
900008298	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020	

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

Mailer IDs
Incomplete

Unavailable Mailer IDs

Payment Accounts

Figure 25: Available MIDs

Unavailable Mailer IDs

Shared Mailer IDs may be Unavailable for enrollment to you when they have already been enrolled by another user. A Mailer ID is referred to as shared when its parent CRID (i.e. the CRID to which it belongs to) has already been registered for the Incentive Program's service by multiple users.

Unavailable Mailer IDs Showing 1 - 9 of 9

MID	Shared?	CRID	Street Address	City	State	ZIP Code
900008040	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020
900008298	Yes	20400393	56 DUPLAINVILLE RD	SARATOGA SPGS	NY	12866-9020
900005241	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900005250	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900005251	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900008582	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900008581	Yes	20488602	W223 N3484 DUPLAINVILLE ROAD Near PO	PEWAUKEE	WI	53072-4175
900008043	Yes	20400560	3201 LEBANON RD	DANVILLE	KY	40422-9604
900008565	Yes	20500318	824 MIDWAY AVE	SAN LEANDRO	CA	94577-1342

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

I Agree I Disagree

Figure 26: Unavailable MIDs

Adding a Mailer ID post-agreement

If a Mailer ID is added to one of your participating CRIDs after you have already agreed to the list presented in the Mailer IDs tab and you want it to participate in the program, you must refresh your list of MIDs. To do this, you must return to the Mailer IDs tab and follow the steps indicated on the page.

Payment Accounts Tab

The Payment Accounts page allows you to review the permits that are associated to your registered business locations. If a permit is added to one of your participating CRIDs in the PostalOne! Pre-production environment, you must wait 30 minutes for the new permit to display on the page. Once you have verified your permits, you must finalize your permit selections before the award claim period begins. You can do so by clicking on the <I Agree> button.

Program Summary
Complete

Additional Contact Information
Incomplete

Locations
Incomplete

Payment Accounts
Incomplete

Program Assistance
Complete

Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is linked to one of the enrolled CRIDs displayed in the Locations tab, take the following steps to link the missing permit.

1. Return to the BCG homepage.
2. Select the Manage Permits link (under Account Services).
3. Select which location you want to link the permit to (click the company name associated to the location).
4. Navigate to Payment/Permit Accounts Tab.
5. Enter the four pieces of information precisely: 1) Account Number, 2) Account Type, 3) Post Office ZIP Code where you opened your permit and, 4) One of ten of the most recent transactions.

After successful authentication, the permit account will be linked to the selected business location and will be visible on this tab.

Once your permit has been linked, go back to the Incentive Programs service from your homepage, navigate back to this tab and ensure that all your permits are listed below. Otherwise, wait up to 30 minutes before using that permit account in the electronic documentation.

Filter: by for [Filter](#)

[Clear Filter](#)

Eligible Permits: Showing 1 - 20 of 133 [Next>](#)

CRID	Permit Account Number	Permit Type	Permit Number	Finance Number	Permit ZIP	PO Address
3456899	123	OI	48	382093	20224-0002	
3456899	123	OI	48	161872	20224-0002	
3456899	123	OI	48	265870	20224-0002	
3456899	123	OI	48	284218	20224-0002	
3456899	123	OI	48	162388	20224-0002	
3456899	123	OI	48	482270	20224-0002	
3456899	123	OI	48	054482	20224-0002	
3456899	123	OI	48	10780	20224-0002	
3456899	123	OI	48	475664	20224-0002	
3456899	123	OI	48	233348	20224-0002	
3456899	123	OI	48	164410	20224-0002	
3456899	123	OI	48	072358	20224-0002	
3456899	123	OI	48	513978	20224-0002	
3456899	123	OI	48	357495	20224-0002	
3456899	123	OI	48	231420	20224-0002	
3456899	123	OI	48	517650	20224-0002	
3456899	123	OI	48	058100	20224-0002	
3456899	123	OI	48	038880	20224-0002	
3456899	123	OI	48	381666	20224-0002	
3456899	123	OI	48	497786	20224-0002	

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

Ineligible Permits: Showing 1 - 1 of 1

CRID	Permit Account Number	Permit Type	Permit Number	Finance Number	Permit ZIP	PO Address
3456899	123	OB	12686526	562490	20224-0002	

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

[I Agree](#) [I Disagree](#)

Figure 27: Payment Accounts Screen for Non-Earned Value Incentives

Earned Value Only: Selecting Multiple Permits

In order to use the credit accrued during the program, you will have to use your selected permit/permits to pay for postage when claiming the incentive in the postage statement. You must verify the accuracy and completeness of the permits so that you will be able to use the credit you accrued during the incentive. You can select one or more permits to split your credit by allocating percentage values to each permit, then click <Update Percentage>. You may select an eligible or custom permit. To assign a percentage value to a single permit or multiple permits, click on the ADD button displayed under the Eligible Permits table.

Note: This functionality is available only for the earned value incentive.

Program Summary

Additional Contact Information
Complete

Locations
Complete

Mailer IDs
Complete

Payment Accounts
Incomplete

Certification
Complete

Activity Report
Incomplete

Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is linked to one of the enrolled CRIDs dislaved in the Locations tab, take the following steps to link the missing permit.

Cropped Page

Selected (Multiple) Permits: Showing 1 - 1 of 1

	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS	Percentage
Remove	899	PI	164950	94543555	619389998		50

Totals Percentage 50%

[Update Percentage](#)

Eligible Permits: Showing 1 - 1 of 1

	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
Add	* 1000	PC	517716	4430515	240229998	

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

Ineligible Permits: Showing 1 - 4 of 4

Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
* 17353025	PE	999924	4430515	99998	
* 9205823	PE	999924	4430515	99998	
* 17353025	PE	999922	4430515	999990000	
* 9205823	PE	999922	4430515	999990000	

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

Custom MSP Permit Search

Please check with your MSP on what permit information should be entered.

* Permit Number: * Permit Type: --Select Category--

City: * State Code:

Figure 28: Add Eligible Permit

Changing my selected permit – Eligible Permits

You can change the selected eligible or custom permit at any time up to the start of the Award Claim Period. To change your permit percentage allocation click on the <Remove> button. Be sure to click on the <I Agree> button once you make your changes. See Figure 19

Note: This functionality is available only for the earned value incentive.

Note: Once the credit has been released (you can perform this action by clicking on the <I Agree> button on the Activity Report in the pre-prod environment) you will be unable to change your permit selection.

Program Summary

Additional Contact Information
Complete

Locations
Complete

Mailer IDs
Complete

Payment Accounts
Incomplete

Certification
Complete

Activity Report
Incomplete

Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is linked to one of the enrolled CRIDs displayed in the Locations tab, take the following steps to link the missing permit.

Cropped Page

Selected (Multiple) Permits: Showing 1 - 1 of 1

	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS	Percentage
Remove	899	PI	164950	94543555	619389998		50

Totals Percentage 50%

[Update Percentage](#)

Eligible Permits: Showing 1 - 1 of 1

	Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
Add	* 1000	PC	517716	4430515	240229998	

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

Ineligible Permits: Showing 1 - 4 of 4

Permit	Type	Finance Number	CRID	ZIP/Postal Code	CAPS
* 17353025	PE	999924	4430515	99998	
* 9205823	PE	999924	4430515	99998	
* 17353025	PE	999922	4430515	999990000	
* 9205823	PE	999922	4430515	999990000	

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

Custom MSP Permit Search

Please check with your MSP on what permit information should be entered.

* Permit Number: * Permit Type:

City: * State Code:

Figure 29: Remove Permit

Ineligible Permits

Based on the permit types allowed by the incentive program, your permits will be sorted as eligible or ineligible as shown in Figure 21 below. For the Earned Value Incentive Program, the only eligible permits are Metered (MT), Precanceled (PC), Permit Imprint (PI), OMAS Imprint (OI), and OMAS Metered (OM).

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

Earned Value **Enrollment Status: IN PROGRESS** [Back to Incentives Home](#)

Program Summary Your permit accounts are shown below. Verify that what is listed is correct. If you do not see a permit and you are sure that it is linked to one of the enrolled CRIDs displayed in the Locations tab, take the following steps to link the missing permit.

Cropped Area

Additional Contact Information Complete

Locations Complete

Mailer IDs Incomplete

Payment Accounts Complete

Program Assistance

Eligible Permits: Showing 1 - 3 of 3

	Permit	Type	CRID	ZIP/Postal Code	CAPS
<input checked="" type="radio"/>	* 90334	PI	20166917	23250	
<input type="radio"/>	* 16868	PI	5155336	46468	16169
<input type="radio"/>	76868	PI	5170321	50468	161667

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

Ineligible Permits: Showing 1 - 1 of 1

Permit	Type	CRID	ZIP/Postal Code	CAPS
* 90334	PP	20166917	23250	

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

* - Indicates a Payment/Permit Account that is linked to a CRID that you share with another user

Figure 30: Ineligible Permits

Custom Permit Search

The Custom Permit Search is available to Mail Owners and MSP's. In order to search for and retrieve MSP /MO - enter the permit number, permit type, and state code.

Note: This functionality is available only for the earned value incentive.

Program Assistance Complete

<input type="radio"/>	811	PE	20488611	20024	12000
<input type="radio"/>	1122	PE	20488611	20024	12000
<input type="radio"/>	298	PP	20488611	20024	12000
<input type="radio"/>	10083	PE	20488611	20024	12000
<input type="radio"/>	1610	PI	20488611	20024	12000
<input type="radio"/>	213	PI	20488611	20024	12000
<input type="radio"/>	33333333	PE	20488611	20024	12000
<input type="radio"/>	22222222	PE	20488611	20024	12000
<input type="radio"/>	90013	OM	20488611	20024	12000

Export options: CSV | Excel | XML | PDF

Custom MSP Permit Search

Please check with your MSP on what permit information should be entered.

* Permit Number: * Permit Type: --Select Category--

City: * State Code:

Figure 31: Custom Permit Search

Select the permit you would like to your credit to be allocated to and click on the save button.

Note: This functionality is available only for the earned value incentive.

The screenshot shows a web browser window with a 'Select MSP Permit' dialog box. The dialog box contains a table with the following data:

Select	Permit Number	Permit Type	Finance Number	City	State	CRID	Business Name	Address
<input checked="" type="radio"/>	1234	PI	357485	Guangzhou		20102025	ChinaAcct	122 Liu Hua Lu
<input type="radio"/>	1234	PI	661204	WASHINGTON	DC	20165122	PROGREG CAT 5	5 CAT St
<input type="radio"/>	1234	PI	999999	MEMPHIS	TN	20165248	NCSC 2	6060 PRIMACY PKWY STE 251

Buttons: Save, Close

Figure 32: Selecting a custom permit

Certification Tab

The Certification tab becomes available once the preceding steps have been completed. You must agree to the Certification Agreement by selecting the <I Agree> button to complete this final enrollment step. Upon agreeing, you are enrolled into the Incentive Program. You will know that you are fully enrolled when you see the Enrollment Status change to “Enrolled”.

The screenshot shows the USPS website interface. At the top left is the USPS logo. At the top right are links for USPS.COM, GATEWAY, HELP, and SIGN OUT. A yellow banner across the top reads "You are in the Preproduction Environment for Mailers". Below this, the page title is "Picture Permit_PO" and the enrollment status is "IN PROGRESS". A "Back to Incentives Home" button is visible. The main content area is divided into a sidebar on the left and a main panel on the right. The sidebar contains five items: "Program Summary Complete", "Additional Contact Information Complete", "Locations Complete", "Payment Accounts Complete", and "Certification Incomplete". The main panel contains a paragraph of text explaining the enrollment process, followed by the heading "Certification Agreement:" and the word "test". Below this are two buttons: "I Agree" and "I Disagree".

UNITED STATES POSTAL SERVICE®

USPS.COM | GATEWAY | HELP | SIGN OUT

You are in the Preproduction Environment for Mailers

Picture Permit_PO Enrollment Status: **IN PROGRESS** [Back to Incentives Home](#)

Program Summary
Complete

To complete enrollment into the program, you must agree to the legal statement below. If you choose to disagree, your enrollment will not be completed and you will be routed to the Program Assistance page to initiate correspondence with USPS regarding your concerns.

Certification Agreement:

test

[I Agree](#) [I Disagree](#)

Additional Contact Information
Complete

Locations
Complete

Payment Accounts
Complete

Certification
Incomplete

Figure 33: Certification Tab

Earned Value Reporting

Once completely enrolled, the Activity Report tab and Permit Balance tab will display below the Certification tab.

The Activity Report section provides both a high-level and a detailed view of volume and earned credit from returned Business Reply Mail (BRM) and Courtesy Reply Mail (CRM) pieces. It lets you know where your earned credit is coming from. You will have to agree to the volume and credit acquired in order to receive the credit.

The Permit Balance section provides both a high-level and a detailed view of your credit usage as it gets used up to pay mailings. It lets you track the history of your earned credit by providing detailed information such as the amount of credit used per postage statement and the remaining balance.

Add Test data for Earned Value Activity Report

In the Pre-Production environment you will be able to enter/modify CRM and BRM pieces so that you will be able experience the end-to-end process when it comes to enrollment and submitting postage statements. Select the MID and Service Type from the drop-down menu that is available. You will then need to enter a Delivery Date and the number of pieces. Once you populate the required fields, click on the <Add> button. Clicking on the <Add> button will create an entry in the table. You also have the option to edit or delete specific rows in the table. See table below.

You are in the Preproduction Environment for Mailers

Earned Value QTP 89933
Enrollment Status: ENROLLED
[Unenroll](#)
[Back to Incentives Home](#)

Program Summary
Complete

Additional Contact Information
Complete

Locations
Complete

Mailer IDs
Complete

Payment Accounts

Add CRM and BRM piece count data

You will be allowed to enter CRM and BRM test piece data only in the pre-prod environment so that you can experience the enrollment process in a non-production environment.

****During the actual promotion, you will not be able to enter or modify CRM and BRM piece count data****

Please enter the CRM and BRM piece count data then click the [Add] button.

*Mailer ID: *Service Type: *Delivery Date: *Pieces:

[Add](#)

Action	Mailer Id	Service Type	Delivery Date	Pieces
[Edit] [Delete]	187485339	CRM	03/06/2014	118
[Edit] [Delete]	187485339	CRM	03/07/2014	44
[Edit] [Delete]	187485339	CRM	03/08/2014	76
[Edit] [Delete]	187485339	CRM	03/09/2014	119
[Edit] [Delete]	187485339	CRM	03/10/2014	13
[Edit] [Delete]	187485339	CRM	03/11/2014	149
[Edit] [Delete]	187485339	CRM	03/12/2014	85
[Edit] [Delete]	187485339	CRM	03/13/2014	135
[Edit] [Delete]	187485339	CRM	03/14/2014	330
[Edit] [Delete]	187485339	CRM	03/15/2014	244
[Edit] [Delete]	187485339	CRM	03/16/2014	296

Figure 34: Add/Edit/Delete Pieces by MID and Service Type

Activity Report: Earned Value (Non-SPLY)

The top section of the Activity Report, displays the percentage allocated to the permits and credit amount. This information will update automatically if you decide to change your percentage allocation on the Payment Accounts tab.

Permit Number	Permit Type	Finance Number	Percent Allocated	Amount
42	PI	517716	50%	\$1,111.11
81	PI	517716	50%	\$1,111.11
Total Available Credit				\$2,222.22

Figure 35: Permit Number and Percentage allocation

Earned Value Summary

Total Volumes for each piece type (i.e., BRM or CRM) are obtained by adding up the tracked volumes you entered in the table for your participating Mailer IDs. The Award Amount is computed based on the Total Volume which is obtained by adding up Total CRM Volume multiplied by the CRM Credit Per Piece and Total BRM Volume multiplied by the BRM Credit Per Piece. [Note: The credit per piece for BRM and CRM are defined by the Program Office.]

As a mailer, you can see how your earned Award Amount grows as more and more returned pieces are scanned and entered into the system.

The “Other Credit” field will only be populated if other mailers from your company enrolled into the incentive program and selected the same permit as you have for their award destination account. The “Other Credit” field displays the total award amount earned by these mailers.

Note: All mailers who are authorized to use a permit can use the credit associated to it once it has been released by the Program Office.

Earned Value Summary

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
10-30-2013	11-08-2013	0	0	\$0.00
		Subtotal	0	\$0.00
		Adjustment	222,222	\$2,222.22
		Grand Total	222,222	\$2,222.22
				Other Credit *
				\$0.00
				Total Available Credit
				\$2,222.22

* Credit belongs to other users

Figure 36: Earned Value Summary

The bottom section (Earned Value Detail Report) provides a detailed view by Mailer ID (MID). Each row represents a different MID for which it displays the total returned volume broken down

into CRM and BRM pieces by month.

Earned Value Detail Report

CRID	Company	MID	JUN 2012		JUL 2012		AUG 2012		P
			CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces	
20400413	Company A	900008256					148	448	
20499224	Company B	900008303		296		1,359		2,371	

SEP 2012		OCT 2012		Total CRM	Total BRM	Total CRM Adjustment	Total BRM Adjustment	Net CRM	Net BRM	Credit Amount for CRM	Credit Amount for BRM
CRM Pieces	BRM Pieces	CRM Pieces	BRM Pieces	CRM	BRM			CRM	BRM		
1,048	2,048		3,448	1,196	5,944	-20	0	1,176	5,944	\$1,176.00	\$297.20
	202		1,064	0	5,292	30	60	30	5,352	\$30.00	\$267.60

Figure 37: Earned Value Detail

CRID: The Customer Registration ID for the business location associated to each of the tracked Mailer IDs.

Company: The company name associated to the business location identified by the CRID.

MID: The Mailer ID that was tracked to obtain the CRM and BRM volumes.

CRM Pieces: The number of returned Courtesy Reply Mail (CRM) pieces you entered for a specific delivery date is displayed in the corresponding month, before adjustments.

BRM Pieces: The number of returned Business Reply Mail (BRM) pieces you entered for a specific delivery date is displayed in the corresponding month, before adjustments.

Total CRM: The total number of returned Courtesy Reply Mail (CRM) pieces as of the current date, before adjustments.

Total BRM: The total number of returned Business Reply Mail (BRM) pieces as of the current date, before adjustments.

Total CRM Adjustment: The total adjustment, in number of pieces, of returned Courtesy Reply Mail (CRM). An adjustment may occur if there is an error in the number of pieces scanned.

Total BRM Adjustment: The total adjustment, in number of pieces, of returned Business Reply Mail (BRM). An adjustment may occur if there is an error in the number of pieces scanned.

Net CRM: The total number of returned Courtesy Reply Mail (CRM) pieces as of the current date, after adjustments.

Net BRM: The total number of returned Business Reply Mail (BRM) pieces as of the current date, after adjustments.

Credit Amount for CRM: The total award amount earned from the adjusted volume of returned Courtesy Reply Mail (CRM) pieces as of the current date.

Credit Amount for BRM: The total award amount earned from the adjusted volume of returned Business Reply Mail (BRM) pieces as of the current date.

Action Buttons:

I Agree: Click on I agree, will release the credit to the postal one preproduction environment. You will be unable to undo the release therefore, please make sure you have selected the right permits and entered in the test data appropriately. You will be able use the permit that has accrued a credit in the postal one preproduction environment when you submit postage statements.

I Disagree: Click on I disagree, if there are discrepancies that can be validated by the mailer. Please enter valid reason and appropriate documentation via program assistance so that the program office can review and resolve your discrepancy. Since you are testing in the pre-production environment this functionality will **not** apply.

Permit Balance

The top section of the Permit Balance report, the Permit Balance Summary, displays a high-level view of your credit usage by mail class. Information is refreshed nightly to reflect data updates from the previous day.

This view lets you track the history of your credit’s usage. It provides high-level information such as the amount of credit used per mail class, the number of postage statements per mail class on which the credit was used, and the remaining credit balance.

As a mailer, you can see how your earned credit gets used as you claim the incentive by populating the promotion code in your eDoc submissions .

Company Name	Permit Number	Permit Type	Finance Number	Credit Acquired	First Class	Standard Mail	Non-Profit	Credit Balance	Date and Time Credit Released			
					Credit Used	Credit Used	Credit Used					
Core Mailers	42	PI	517716	\$1,111.11	(\$50.20)	1	0	2	\$0.00	0	\$782.71	11/14/2013 13:44
Core Mailers	81	PI	517716	\$1,111.11	(\$1,111.11)	1	\$0.00	0	\$0.00	0	\$0.00	11/19/2013 8:34

Figure 38: Permit Balance Summary Table

Read the content that follows for a more complete description of the information displayed in the Earned Value Detail Report section.

Company Name: The company name associated to your primary affiliation location.

Permit Number, Permit Type, and Finance Number: These 3 data elements uniquely identify the permit account that you designated as the destination account for your earned credit.

Credit Acquired: The total amount of earned credit that was destined to the selected permit. This amount could proceed from multiple users and might not reflect exclusively the individual contribution of your registered Mailer IDs.

Credit Used: The amount of credit that has been used up by you, per mail class, as of the current date.

Number of Postage Statements: The number of postage statements, per mail class, on which the credit was used by you.

Credit Balance: The amount of credit remaining on the permit. It takes into account the amount used up by other users, when applicable.

Date and Time Released: The date and time of when the credit acquired was released to the system in charge of postage statement processing. It is then ready to be used.

The bottom section, the Permit Balance Detail, provides a detailed view of your credit usage broken down by each individual Postage Statement. It lets you track the history of your credit usage giving you detailed information such as the amount of credit used per postage statement, the date when it was used, and the Postage Statement Sequence Number.

Permit Balance Detail

Mailing Date	Postage Statement Seq Number	Mail Class	Total Adjusted Postage	Total Pieces	Incentive Amount
12/12/2012	5200438	SM	\$159,154.14	650,105	-\$5.98
12/12/2012	5200439	SM	\$70,805.94	300,109	-\$5.98
12/12/2012	5205457	SM	\$.40	1	-\$5.98
12/12/2012	5205475	FC	\$34.87	94	-\$5.98
12/12/2012	5205480	FC	\$34.87	94	-\$5.98
12/12/2012	5205695	FC	\$228.66	980	-\$5.98
12/12/2012	5224673	SM	\$1,078.64	5,474	-\$5.98
12/12/2012	5224720	SM	\$364.32	0	-\$5.98
12/12/2012	5224722	SM	\$160.43	0	-\$5.98
12/12/2012	5224733	SM	\$.84	4	-\$5.98

[Download to Excel](#)

Figure 39: Permit Balance Detail Table

Read the content that follows for a more complete description of the information displayed in the Earned Value Detail Report section.

Mailing Date: The date when a portion of, or all of the earned credit was used to pay for postage on the respective postage statement.

Postage Statement Seq. Number: The sequence number of the respective postage statement; a unique identifier that facilitates finding postage statement.

Mail Class: The mail class of the pieces associated to the respective postage statement.

Total Adjusted Postage: The remaining balance on the postage statement after the incentive amount has been subtracted from the original postage amount.

Total Pieces: The total number of pieces charged on the respective postage statement.

Incentive Amount: The portion of the earned credit used up to pay for the respective postage statement.

Activity Report: For SPLY (Same Period Last Year) Earned Value Incentives

The reports described below will display for customers who enroll in 2 earned value incentives consecutively. Starting in 2015, the earned value incentive will provide an additional incentive to mailers who enrolled in the previous earned value incentive. Enrollment will remain the same, however, the Earned Value Activity Report will display additional columns. No changes have been made to the Permit Balance Report.

Add Test data for Earned Value Activity Report

In the Pre-Production environment you will be able to enter/modify CRM and BRM pieces so that you will be able experience the end-to-end process when it comes to enrollment and submitting postage statements. Select the MID and Service Type from the drop-down menu that is available. You will then need to enter a Delivery Date and number of pieces. Once you populate the required fields, click on the <Add> button. Clicking on the <Add> button will create an entry in the table. You also have the option to edit or delete specific rows in the table. See table below.

You are in the Preproduction Environment for Mailers

Earned Value QTP 89933
Enrollment Status: ENROLLED
[Unenroll](#)
[Back to Incentives Home](#)

Program Summary
Complete

Additional Contact Information
Complete

Locations
Complete

Mailer IDs
Complete

Payment Accounts

Add CRM and BRM piece count data

You will be allowed to enter CRM and BRM test piece data only in the pre-prod environment so that you can experience the enrollment process in a non-production environment.

****During the actual promotion, you will not be able to enter or modify CRM and BRM piece count data****

Please enter the CRM and BRM piece count data then click the [Add] button.

*Mailer ID:
*Service Type:
*Delivery Date:
*Pieces:

--Select MID--
--Select Type--

Add

Action	Mailer Id	Service Type	Delivery Date	Pieces
[Edit] [Delete]	187485339	CRM	03/06/2014	118
[Edit] [Delete]	187485339	CRM	03/07/2014	44
[Edit] [Delete]	187485339	CRM	03/08/2014	76
[Edit] [Delete]	187485339	CRM	03/09/2014	119
[Edit] [Delete]	187485339	CRM	03/10/2014	13
[Edit] [Delete]	187485339	CRM	03/11/2014	149
[Edit] [Delete]	187485339	CRM	03/12/2014	85
[Edit] [Delete]	187485339	CRM	03/13/2014	135
[Edit] [Delete]	187485339	CRM	03/14/2014	330
[Edit] [Delete]	187485339	CRM	03/15/2014	244
[Edit] [Delete]	187485339	CRM	03/16/2014	296

Figure 40: Add/Edit/Delete Pieces by MID and Service Type

Activity Report

The top section of the Activity Report, displays the percentage allocated to the permits and credit amount. This information will update automatically if you decide to change your percentage allocation on the payment accounts tab.

Permit Number	Permit Type	Finance Number	Percent Allocated	Amount
42	PI	517716	50%	\$1,111.11
81	PI	517716	50%	\$1,111.11
Total Available Credit				\$2,222.22

Figure 41: Permit Number and Percentage allocation

Earned Value Summary

Total Volumes for each piece type (i.e., BRM or CRM) are obtained by adding up the tracked volumes across all your participating Mailer IDs. The Award Amount is computed based on the Total Volume which is obtained by adding up Total CRM Volume multiplied by the CRM Credit Per Piece and Total BRM Volume multiplied by the BRM Credit Per Piece. [Note: The credit per piece for BRM and CRM are defined by the Program Office.]

As a mailer, you can see how your earned Award Amount grows as more and more returned pieces are scanned and entered into the system.

The “Other Credit” field will only be populated if other mailers from your company enrolled in the program and selected the same permit as you for their award destination account. The “Other Credit” field displays the total award amount earned by these mailers. Note that all mailers who are authorized to use a permit could use the credit associated to it once it has been released by the Program Office.

Earned Value Summary

Award Start Date	Award End Date	Total Volume CRM	Total Volume BRM	Award Amount
10-30-2013	11-08-2013	0	0	\$0.00
	Subtotal	0	0	\$0.00
	Adjustment	222,222	0	\$2,222.22
	Grand Total	222,222	0	\$2,222.22
			Other Credit *	\$0.00
			Total Available Credit	\$2,222.22

* Credit belongs to other users

Figure 42: Earned Value Summary

The bottom section, Earned Value Detail Report, provides a detailed view by Mailer ID (MID). Each row represents a different MID for which it displays the total returned volume broken down into CRM and BRM pieces by month.

Read the content that follows for a more complete description of the information displayed in the Earned Value Detail Report section.

CRID	Company	MID	Previous Total	Current	Growth	Credit Per	Mar-15		Total CRM	Total BRM Pieces	Total CRM	Total BRM	Net CRM	Net BRM	CRM Total	BRM Total
			Count	Total Count	%	Piece	CRM	BRM	Pieces	Piece	Piece Adjust	Pieces	Pieces	Credit	Credit	
4430796	AUTOMATED MAILING:	100017	4,000	200,000	4,900.00	\$0.03	0	0	0	0	100,000	100,000	100,000	100,000	\$3,000.00	\$3,000.00
4430796	AUTOMATED MAILING:	100019	200,000	300,000	50	\$0.03	0	0	0	0	150,000	150,000	150,000	150,000	\$4,500.00	\$4,500.00
4430796	AUTOMATED MAILING:	100021	200,000	100,000	-50	\$0.02	0	0	0	0	50,000	50,000	50,000	50,000	\$1,000.00	\$1,000.00
4430796	AUTOMATED MAILING:	100022	200,000	200,000	0	\$0.03	0	0	0	0	100,000	100,000	100,000	100,000	\$3,000.00	\$3,000.00
4430796	AUTOMATED MAILING:	100023	200,000	1,800,000	800	\$0.05	0	0	0	0	900,000	900,000	900,000	900,000	\$45,000.00	\$45,000.00
4430796	AUTOMATED MAILING:	200075	0	200,000	n/a	\$0.02	0	0	0	0	100,000	100,000	100,000	100,000	\$2,000.00	\$2,000.00
4430796	AUTOMATED MAILING:	900000395	0	200,000	n/a	\$0.02	0	0	0	0	100,000	100,000	100,000	100,000	\$2,000.00	\$2,000.00
4430796	AUTOMATED MAILING:	900000451	0	200,000	n/a	\$0.02	0	0	0	0	100,000	100,000	100,000	100,000	\$2,000.00	\$2,000.00

Figure 43: Earned Value Detail Report Section

CRID: The Customer Registration ID for the business location associated to each of the tracked Mailer IDs.

Company: The company name associated to the business location identified by the CRID.

MID: The Mailer ID that was tracked to obtain the CRM and BRM volumes.

Previous Total Count: The cumulative number of BRM and CRM pieces you mailed in the previous earned value incentive

Current Total Count: The cumulative number of BRM and CRM pieces you mailed in the current earned value promotion.

Growth %: Growth percentage is calculated based on your total presence piece count divided by past years piece counts.

Credit per Piece: The credit per piece you will receive for a specific MID.

CRM Pieces: The number of returned Courtesy Reply Mail (CRM) pieces as of the current date for the corresponding month, before adjustments.

BRM Pieces: The number of returned Business Reply Mail (BRM) pieces as of the current date for the corresponding month, before adjustments.

Total CRM: The total number of returned Courtesy Reply Mail (CRM) pieces as of the current date, before adjustments.

Total BRM: The total number of returned Business Reply Mail (BRM) pieces as of the current date, before adjustments.

Total CRM Adjustment: The total adjustment, in number of pieces, of returned Courtesy Reply Mail (CRM). An adjustment may occur if there is an error in the number of pieces scanned.

Total BRM Adjustment: The total adjustment, in number of pieces, of returned Business Reply Mail (BRM). An adjustment may occur if there is an error in the number of pieces scanned.

Net CRM: The total number of returned Courtesy Reply Mail (CRM) pieces as of the current date, after adjustments.

Net BRM: The total number of returned Business Reply Mail (BRM) pieces as of the current date, after adjustments.

Credit Amount for CRM: The total award amount earned from the adjusted volume of returned Courtesy Reply Mail (CRM) pieces as of the current date.

Credit Amount for BRM: The total award amount earned from the adjusted volume of returned Business Reply Mail (BRM) pieces as of the current date.

Action Buttons:

I Agree: Click on I agree, will release the credit to the postal one preproduction environment. You will be unable to undo the release therefore, please make sure you have selected the right permits and entered in the test data appropriately. You will be able use the permit that has accrued a credit in the postal one preproduction environment when you submit postage statements.

I Disagree: Click on I disagree, if there are discrepancies that can be validated by the mailer. Please enter valid reason and appropriate documentation via program assistance so that the program office can review and resolve your discrepancy. Since you are testing in the Pre-Production environment this functionality will not apply.

Incentive Program Activity Reporting: Discount-based Incentives

Once completely enrolled, a new tab is displayed below the Certification tab. If you have both MSP (Mail Service Provider) and MO (Mail Owner) CRIDs, you will be able to view both reports, however, if you have only MSP CRIDS you will be able to view the MSP Activity report. Whether you are a Mail Service Provider or a Mail Owner, you should now see the Activity Report tab. The content in the Activity Report is different for the MSP and Mail Owner to provide MSPs and Mail Owners with information that is relevant to each.

Mail Owner Activity Report

The top section of the Mail Owner Activity Report - Activity Summary - displays a summary view of the aggregate Volume (Total Pieces), Discount Amount, and Total Postage associated to the program in real-time.

As a Mail Owner, you can see how much you have saved up until that point in time. Refer to the figure below



Figure 44: Mail Owner Activity Report

The bottom section (Detailed Activity) displays a more detailed view aggregated by day and by permit so that each row represents daily total mailing activity for each permit. Additionally, the information is displayed separated into sections corresponding to mail classes (i.e., First-Class, Standard, Non Profit). For every day of the promotion and for each permit in the Permit Holder field, the report aggregates the data and displays the Number of Postage Statements generated from that permit and the following permit information: Permit Number, Permit Type and Finance Number. Additionally, it displays the Volume (Pieces) and Discount Amount. Refer to Figure 26.

Please read the content that follows for a more complete description of the information displayed in the Detailed Activity section.

Standard Mail

Mailing Start Date: Mailing End Date:

Filter:

Mailing Date	Number of Postage Statements	Permit Info	Permit Type	Finance Number	Volume (pieces)	Discount Amount
06/21/2012	1	8	PI	51XXX	1,000	(\$3.94)
07/01/2012	1	78	PI	51XXX	1,000	(\$2.84)
Total:					2,000	(\$6.78)

Showing 1 to 2 of 2 entries



Figure 45: Detailed Mail Owner Activity Report

Mailing Date: The mailing date is populated in the eDoc. It may or may not correspond with the date of eDoc submission.

Number of Postage Statements: The number of postage statements generated from that permit on that Mailing Date.

Permit Number and Permit Type: The permit number and permit type of the permit for that row (the permit in the Permit Holder field in the eDoc).

Volume (pieces): The total number of pieces, including non-discounted pieces, in all postage statements for the permit for the mailing date. This number includes pieces that didn't qualify for the discount.

Discount Amount: The aggregate amount discounted off of the postage from all the postage statements generated from that permit on that mailing date. The discount amount is based solely on discounted pieces (i.e., pieces that qualify for the discount).

MSP (Mail Service Provider) Activity Report

The top section of the Activity Report for MSPs (Activity Summary) displays an aggregate view of the Volume (Total Pieces), Discount Amount, and Total Postage associated to the program. Data is refreshed in near real-time for all statements that you are the mailing agent.

As a MSP, you can see how much you have saved for all your clients. Note that if you are also mailing for yourself, the information associated to those mailings will also be included in the aggregate view.

Activity Summary

Award Start Date	Award End Date	Total Pieces	Discount Amount	Total Postage
05/17/2012	08/31/2012	2,000	(\$6.00)	\$332.22
Total:		2,000	(\$6.00)	\$332.22

Showing 1 to 1 of 1 entries

Figure 46: Activity Summary

The bottom section (Detailed Activity) displays a daily view based on each postage statement generated as the mailing agent. For each postage statement, the report displays the mailing date, the CRID populated in the 'For' section of the eDoc, the company name associated to the CRID in the 'For' section of the eDoc and the permit information for the permit that was charged the final postage amount (the permit in the Permit Holder field). Additionally, it displays the Volume (Total Pieces), Discount Amount and Total Postage per postage statement. Note that the Total Postage is actually the Total Adjusted Postage after all applicable discounts and credits haven been applied. Refer to Figure 28.

Please read the content that follows for a more complete description of the information displayed in the Detailed Activity section.

Detailed Activity

Mailing Start Date: Mailing End Date:

Filter:							
Mailing Date	CRID	Company	Permit Number	Permit Type	Total Pieces	Discount Amount	Total Postage
06/21/2012	XXXX796	CLIENT C	567	PI	1,000	(\$3.00)	\$193.06
07/01/2012	XXXX796	COMPANY A	781	PI	1,000	(\$2.00)	\$139.16
06/21/2012	XXXX796	COMPANY B	78	PI	1,000	(\$3.00)	\$193.06
07/01/2012	XXXX796	COMPANY A	781	PI	1,000	(\$2.00)	\$139.16

Showing 1 to 4 of 4 entries

Figure 47: Detailed Activity

Detailed Activity Report: Column explanations

Mailing Date: The mailing date corresponds to the day the mail acceptance clerk finalizes the postage statement. The date may or may not correspond with the date of electronic file submission (or Mailer's mailing date).

CRID: The CRID populated in the 'For' section of the electronic file may be a mail owner CRID if you're mailing on behalf of a client or it may be one of your CRIDs, if you're acting in the role of a mail owner and mailing for yourself.

Company: The Company name associated to the CRID from the CRID column.

Permit Number and Permit Type: The permit number and permit type of the permit that got charged the final postage amount (the permit in the Permit Holder field in the electronic file).

Total Pieces: The total number of pieces includes non-discounted pieces in all postage statements for the permit for the mailing date. This number includes pieces that did not qualify for the discount.

Discount Amount: The aggregate amount discounted off of the total postage from all the postage statements generated from that permit on that mailing date. The discount amount is based solely on discounted pieces (i.e., pieces that qualify for the discount).

Total Postage: The total adjusted postage after all applicable discounts and credits have been applied. It is not necessarily the difference between the total revenue and the incentive program's discount; there could be other discounts and/or credits that are not displayed in the report but applied to the postage statement.

My Activity Report (Consolidated MO/MSP Activity Report)

Users who enroll in a new incentive will see only one report moving forward – My Activity. The report data elements for both the MSP and MO are consolidated

Program Summary

Additional Contact Information
Complete

Locations
Complete

Payment Accounts
Complete

Certification
Complete

My Activity Report

Program Assistance

Activity Report

Activity is updated on a daily basis. Each mailing date reflects a daily total mailing activity.

Mailing Start Date: Mailing End Date:

Filter:

Mailing Date	Company	Postage Statement Id	Mail Class	Permit Number	Permit Type	Finance Number	Total Pieces	Discount Amount	Total Postage
03/27/2015	PRODi CATS	77412768	SM	655	PI	105000	1,584	(\$6.80)	\$0.00
03/30/2015	PRODi CATS	77446641	SM	652	PI	105000	500	(\$2.15)	\$26.07
04/02/2015	PRODi CATS	77449462	SM	655	PI	105000	777	(\$3.32)	\$0.00

Showing 1 to 3 of 3 entries

[Download to Excel](#)

Figure 48: My Activity Report

Activity Report: Column explanations

Mailing Date: The mailing date corresponds to the day the mail acceptance clerk finalizes the postage statement. The date may or may not correspond with the date of electronic file submission (or Mailer's mailing date).

Company: The Company name associated to the CRID from the CRID column.

Postage Statement Seq. Number: The sequence number of the respective postage statement; a unique identifier that facilitates finding postage statement.

Mail Class: The mail class of the pieces associated to the respective postage statement.

Permit Number, Permit Type & Finance Number: The permit number and permit type of the permit that got charged the final postage amount (the permit in the Permit Holder field in the electronic file).

Total Pieces: The total number of pieces includes non-discounted pieces in all postage statements for the permit for the mailing date. This number includes pieces that did not qualify for the discount.

Discount Amount: The aggregate amount discounted off of the total postage from all the postage statements generated from that permit on that mailing date. The discount amount is based solely on discounted pieces (i.e., pieces that qualify for the discount).

Total Postage: The total adjusted postage after all applicable discounts and credits have been applied. It is not necessarily the difference between the total revenue and the incentive program's discount; there could be other discounts and/or credits that are not displayed in the report but applied to the postage statement.

Frequently Asked Questions (FAQ)

1. What is a BSA and why is it required?

A Business Service Administrator (BSA) is the person authorized to control who can access a business service on behalf of your company. A BSA has power over all service and location combinations for which they are the BSA. You should only become the BSA for a service and location combination if you are elected by your company to perform this role.

2. What is a contingent BSA and when is it required?

Because Incentive Programs involve financial data, an extra approval layer has been added to protect your data. If there is no BSA for Incentive Programs, the BSA for Manage Mailing Activity must approve whoever requests to become the BSA for Incentive Programs. This approval must be provided for each of your company's locations. Once you become the BSA for Incentive Programs for a location you can approve or deny access to the service for that location.

Enrolling all of your business locations (CRIDs) for the Incentive Programs Service ensures that all of your permits are linked to the program and become enrolled.

When requesting access to Incentive Programs, the request will be pending until a BSA for Manage Mailing Activity approves your request for access. If there is no BSA for Manage Mailing Activity, upon requesting access to Incentive Programs you can become the BSA for Manage Mailing Activity. Your request for Incentive Programs will be approved automatically. Otherwise if you opt not to assume the BSA role, you will have to wait until the forthcoming Incentive Programs BSA approves your request.

3. For which locations should I become the BSA?

It is generally recommended that you become the BSA if no BSA exists for a service and location combination. You should become the BSA if you want to manage other user's access to the service for a particular location.

If a service requires BSA approval, there must be a BSA established for your company's mailing locations before members of your company can gain access to the service for those locations. Otherwise the request for the service will remain in "pending". After 25 days, if the BSA role is not filled, your request will automatically be purged, without notification.

4. How can I add a new location to Incentive Programs after I'm done with the enrollment process?

Complete section 1 of the enrollment guide: "Request Incentive Programs", making sure that you select the <Add Location> button in step 1.4.

If you are experiencing difficulties while adding a location, refer to section 2 (a) of the Troubleshooting document.

5. Where can I see the CRID of a location for which I requested a service?

Select the 'Request Status >>' link located at the top of the page. This displays a page that contains a table with a list of all the locations for which requests have been made. Find the location by identifying the exact address and then select the link under the 'Business Location' column for the corresponding row. This opens up a pop-up window that displays the CRID of the location.

6. *Where can I view my access to business services?*

Sign in to the Business Customer Gateway and select the 'Profile >>' link located at the top of the page. This page lists all the locations and their associated services.

7. *Where can I see the status of my requests to access Incentive Programs?*

To look up the status of the request for all your locations, select the 'Request Status >>' link located at the top of the page. This page lists all of your requests. Make sure that you are looking at locations for which the Service is "Incentive Programs".

8. *What is the difference between requesting access to incentive programs and requesting access to a specific incentive?*

Requesting access to incentive programs from the BCG determines who can access an incentive program on behalf of your company. Once access has been granted for the Incentive Programs service, you can select the incentive program and begin enrollment.

9. *Why is it recommended to enter the CRID of a location when trying to add the location to my profile?*

Entering the CRID in the CRID data input field ensures that you uniquely identify the business name and address combination for your company. Even with an identical address, if you use variations of a company name, such as "My Company" and "My Company Global Services", they may not be recognized as belonging to the same company by the address matching system. Entering the CRID circumvents this potential issue (opposed to entering address information in the address input fields).

Troubleshooting

1. **Step 1.1** Navigate to the BCG and sign in.

a. ***What is the Business Customer Gateway web address?***

<https://gateway.usps.com>

b. ***I can't sign in***

If you're unable to sign in, it is because you either don't have an account or you're entering the incorrect username/password combination.

If you have an account, click on the 'I forgot my password' link and follow the instructions to reset your password.

2. **Step 1.4** Add all your Business Locations

a. ***I don't know the CRID of the location that I want to add***

There are two reasons why you might not know the CRID of a location you're trying to add.

i. New Location

Your location will be a new location in our system. CRIDs are assigned by the USPS. Locations, which are not currently in our system, mean a CRID has not yet been assigned.

ii. Existing Location

All existing locations have been assigned a CRID. In this case, you may simply not know the CRID. Note: To see if a CRID exists, you can call the *PostalOne!* Customer Care Center at (800) 522-9085 or postalone@email.usps.gov.

For a New Location, select the 'Business Name and Address' radio button and enter the exact address of the location you wish to add.

For an Existing Location, if you remember the exact name of the company and the exact address of the location as it was initially enrolled, you can select the 'Business Name and Address' radio button and enter the required information. It is recommended that you use the CRID of a location when it has one. If you don't know how to find the CRIDs of locations refer to 7 (b) below.

For more information on why you should add all of your business locations, see (3) of the FAQ sheet.

For more information on why you should use the CRID of a location to add it, see (9) of the FAQ sheet.

3. **Step 1.6** Confirm your Selection

a. ***I don't know the CRID of the location I just added***

To look up the CRID of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page to access the display a pop-up window that displays the CRID.

4. **Step 1.7** Request to be the BSA for Incentive Programs

a. *Of which locations should I become the Business Service Administrator (BSA) for Incentive Programs?*

Become the Incentive Programs BSA of a location if you are elected by your company to perform this role. The Incentive Programs BSA must approve all requests from other users to gain access to the service. As a result, there must be an Incentive Programs BSA for each location that you wish to register in the Incentive Programs service.

When requesting to become Incentive Programs BSA for a location, the request will be pending until the BSA for Manage Mailing Activity (MMA) for that location approves your request. If there is no BSA for Manage Mailing Activity, you can request this role. The request to become MMA BSA is approved automatically by the system when the role is vacant. If already pending, your request to become Incentive Programs BSA will be approved immediately by the system. Otherwise, if you are not to assume the Incentive Programs BSA role, you will have to wait until the Incentive Programs BSA approves your request.

5. Step 1.7.2 Become the BSA for Manage Mailing Activity

a. *Why could it be required?*

The Manage Mailing Activity BSA must approve all users' requests to become Incentive Programs BSA. This contingent approval was put into place in the form of a human decision that could have otherwise been an automatic approval by the system. This dependency helps prevent unauthorized users from accessing your mailing activity and permit information. For more information about Contingent BSA and Contingent BSA Approval, see number (2) on the FAQ sheet.

6. Step 2.3 Repeat 1.4, 1.5 and 1.6 above

a. *I don't remember which were the locations entered in 1.4 for which I requested to become the BSA for Incentive Programs*

To look up the status of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This page lists all of your requests.

Find the locations with a status of "Pending External BSA" and select their name to access the pop-up window that contains the CRID.

b. *I don't know the CRIDs of some locations*

To look up the CRID of any location, sign in to the Business Customer Gateway and select the 'Request Status >>' link located at the top of the page. This displays a page with all of your requests. Find and select the location's name to access the pop-up window that contains the CRID.

c. *I don't know if I'm entering the exact addresses that were entered in 1.4*

Instead of entering addresses to add locations that were already entered in 1.4, it is recommended that you enter the CRIDs into the CRID input fields for existing locations. If you don't know how to find the CRIDs of locations refer to (b) directly above.

7. Step 3.1 Select Incentive Programs under the Account Service category.

Incentive programs are published in advance of the program start date to enable you to register before the start of the promotion

8. **Step 4** Enroll

Program Registration Landing Page

a. When I select an Incentive Program, the message “This program is not available for enrollment” is displayed. Why can’t I enroll?

Not all Incentive Programs are available for enrollment for all customers. This indicates one of two things:

- i. The current date falls outside of the Incentive Program’s specified registration time period.
or
- ii. You are not eligible to enroll for the Incentive Program because you do not have an eligible or pre-qualified permit. Refer to the requirements and parameters in the program description.

If you believe neither of these is your case, contact the Program Office by using the Program Assistance tab.

Locations Page

b. I thought I had enrolled a location for Incentive Programs in the BCG, but I don’t see it in the ‘Locations’ tab.

The first step towards resolving this issue is to verify that you actually enrolled the location(s) to Incentive Programs. To do this, navigate to the Business Customer Gateway and sign in. To look up the status of any location, select the ‘Request Status >>’ link located at the top of the page. This displays a page with all of your requests. Make sure that your locations have a Status of “Approved” and that the Service is “Incentive Programs”.

If your Location’s Service is different from “Incentive Programs” you need to complete section 1 of the Enrollment Guide.

If your Location’s Status is “Pending BSA”, this means that the BSA for Incentive Programs for your location needs to approve your request to have the location added to Incentive Programs.

If your Location’s Status is “Pending External BSA” you need to complete section 1.7.2 of the Enrollment Guide.