PostalOne!® User Guide
Version 11.0.0

December 2006

PREFACE

This document is a comprehensive user guide that explains the functionality available to customers in the *PostalOne!*® system. The features described in this guide have been developed for U. S. Postal Service™ customers wishing to conduct business electronically with the Postal Service. Whether you are submitting mailing jobs electronically or viewing mailing information after submitting the jobs, the *PostalOne!* system maximizes your ability to work efficiently.

This guide is organized as follows: Chapter 1 provides an overview of the *PostalOne!* program and its features and benefits. Chapter 2 explains the application process including information on how to obtain access to the *PostalOne!* system. Chapter 3 provides detailed instructions to use the many features available. Specifically, this guide provides key insights for working with electronic postage statements, viewing mailing information, and working with reports.

On behalf of the *PostalOne!* team, we welcome you into the program. You will be joining other customers successfully using the *PostalOne!* system to strengthen and improve collaboration between the Postal Service and its customers. We welcome your feedback and look forward to working with you to improve the way we do business.

TABLE OF CONTENTS

1. Program Overview

Using the latest Internet technologies, the *PostalOne!* system provides a suite of online services and a single point of customer access to many of the Postal Service business systems used in the mail process workflow. The *PostalOne!* system allows business mailers to integrate their mail planning and production processes with those of the Postal Service for efficient and streamlined mail induction.

1.1 Key Features

No more paper printouts

The *PostalOne!* system automates much of the acceptance and verification process, enabling a faster and more accurate method of accepting, assessing, and finalizing your postage statements. The electronic documentation provided by the *PostalOne!* system means you will no longer have to physically bring much of the presort paper documentation to Postal Service acceptance units or have it delivered to storage.

Know more about your mail

Using the *PostalOne!* system, customers can view individual postage statements, see an overview of the containers within a mailing, submit forms electronically, and review metrics for files transferred.

1.2 Key Benefits

Integrated, online, web-based solutions providing:

- Simplified mail acceptance
- Reduced hard copy paperwork
- System-generated electronic presort documentation and postage statements
- Reduced administrative costs for printing and storage
- Improved tracking of mailing jobs and access to mailing information

1.3 How can the system be used in your business environment?

The *PostalOne!* system has leveraged technology to impact your business processes in many ways. It enables customers to electronically send detailed mailing data by using the industry standard Mail.dat® file specification, or to complete and electronically submit a mailing form online. Customers using the *PostalOne!* system no longer have to complete and present manual paper postage statements because the *PostalOne!* system automatically generates them.

1.4 Customer Commitment Required

The key investment you will make is through the commitment of your staff to make the transition to the *PostalOne!* system successful. This may include internal programming to modify your system files, if required. Depending on the file transfer method selected, it may require obtaining a VeriSign digital certificate and Mail.dat certification. Some customers may choose the automated or unattended batch transfer method. If so, a digital certificate is required. For more information about the technical requirements, see the *PostalOne! Technical Guide*, which is available from the *PostalOne!* website: www.usps.com/postalone/guides.htm.

2. Applying for Participation

2.1 Getting Started

It's as easy as visiting the *PostalOne!* home page at www.usps.com/postalone and clicking the **Learn More** button on the right under New Customers. There, you will find additional information about the program and application process. If you have questions, call the *PostalOne!* Customer Care Center at (800) 522-9085.

2.2 Program Requirements

To help you decide if using the *PostalOne!* system is right for you, we have included the question most often asked by customers below.

DO I MEET THE CURRENT REQUIREMENTS TO SEND MAILING INFORMATION ELECTRONICALLY VIA THE *POSTALONE!* SYSTEM?

Ask yourself the following questions:

- Do I have Internet access?
- Does my company have the ability to transmit Mail.dat 05-1 or Mail.dat 05-2 files?

If you answered YES to these questions, you may be ready to complete the application process to begin using the *PostalOne!* system.

2.3 What Happens After I Apply?

After completing the online application, the Customer Care Center will review the application to ensure that we accurately establish your account. Soon after completing the online application, you will receive a *PostalOne!* Welcome Kit. In addition to general information about the *PostalOne!* system, the Welcome Kit contains:

- **User Agreement (Data Exchange Agreement for sending files electronically; System Access Agreement for viewing mailing information)**: An agreement between your company and the Postal Service that outlines terms and conditions of participating in the program.
- **Site Administrator Designation Form**: A form used to identify a coordinator to oversee administrative requirements of user access. Site administrator duties are listed below.
- **Customer Request for Web Access, PS Form 1357-C**: A required form that must be completed and signed by each new user applying for access to the *PostalOne!* system. Each user must have their own form. PS Form 1357-C is included in the Welcome Kit or you can print one using the online form (available from http://www.usps.com/forms/_pdf/ps1357c.pdf). Either form is acceptable but a signed hard copy must be mailed to the Customer Care Center after your required approval signatures are obtained.
- Customer Account Activation: When the necessary paperwork has been processed, we will activate your account. We will send your site administrator an e-mail message with the username and a temporary password.

2.4 Requirements and Duties for Site Administrators

The site administrator role is a critical part of your company's transition to the *PostalOne!* system. The site administrator is the key contact with the *PostalOne!* support team and is responsible for coordinating system administration within your company. This person also must approve all requests for computer access to the *PostalOne!* system within your company. The excerpts below are taken from the user agreement that is contained in the Welcome Kit. For more information, read the entire user agreement.

- **Site Administrator** The participant will appoint a site administrator to administer participant's access and use of the *PostalOne!* system. Participant will provide the *PostalOne!* Customer Care Center with the name of and contact information for its site administrator by completing the Site Administrator Designation Form.
- **Site Administrator Responsibility** Participant or site administrator will (a) accept logon IDs from the *PostalOne!* Customer Care Center on behalf of its users, (b) be responsible for activating and deactivating its users' logon IDs, and (c) be responsible for assigning the appropriate access levels to its users.
- **Site Administrator Obligations** Participant or site administrator will advise its users of their obligations under this agreement.
- **Personnel Change Site Administrator** Participant shall notify the *PostalOne!* team in writing when a site administrator leaves employment at participant's company. If participant fails to notify the *PostalOne!* team, participant is liable for any loss sustained by the Postal Service and any other third-parties resulting from the subscriber's failure to submit such notification.

ADDITIONAL BUSINESS MAILING SOLUTIONS:

If, for any reason, you do not believe the *PostalOne!* system is right for you, we would like to highlight two additional business mailing solutions that may help meet your mailing needs. They are:

- **Business Mail 101** is a user-friendly tool that will help you harness the power of mail for your business or organization. This website will walk you through all of the key decision points in the mailing process. Business Mail 101 is an excellent source for mailing information and will direct you to resources to help you understand your options and help you make the right choices for your business or organization. You can access Business Mail 101 at: www.usps.com/businessmail101/
- The **Postage Statement Wizard**® software provides customers with the ability to complete some of the most common business mailing forms through the Internet using a secure connection with the Postal Service. The Wizard saves time by performing postage calculations, and customers can save heading information for use the next time that the same form is needed. Wizard forms contain all required data and are acceptable for presentation with a bulk business mailing. You must have a pre-installed security certificate, and Microsoft Internet Explorer 4.0 or higher or Netscape 4.0 or higher installed as your Internet browser. The preferred screen resolution is 800 x 600. For more information, go to the Postage Statement Wizard website: www.usps.com/forms/postagewizard.htm.

3. Using System Functionality

Business mailers and mail owners can perform vital functions using the *PostalOne!* system:

- System basics
- Validating and transferring Mail.dat files
- Creating and reviewing postage statements
- Viewing detailed job information
- Working with reports

These are introduced briefly below.

This section begins by explaining how to log on to the system, how to change your user profile information, what to do if your password needs resetting and how to contact customer assistance. To read about this, see Section 3.1, "System Basics."

The system's file validation and transfer tools make submitting mailing information to the Postal Service quick, easy, and accurate. Our File Validator allows users to verify that all required information is contained in the Mail.dat files and that the files are properly formatted before submitting the job. If files are not properly formatted, detailed error messaging ensures that users can quickly identify and resolve the problem before they submit their jobs. Our File Transfer and Batch Processor tools make submitting Mail.dat files equally as simple. Best of all, using the system to electronically submit mailing jobs reduces the need for the required presort paper documentation, which can result in additional savings in time and money. For details, see Section 3.2, "Validating and Transferring Mail.dat Files."

Electronic documentation options also extend to postage statements. Business mailers can submit and review postage statements electronically. Providing our business mailers with electronic postage statements enables them to get their mailing jobs processed, paid for, and delivered, easier and faster. It has also helped the Postal Service ensure that our customers are being accurately billed for their mailings, saving time and money for both the Postal Service and its customers.

In addition to saving time and money, business mailers can view information about the status of their mailing jobs. Customers can use the job information reporting tools for immediate online access to accurate information regarding job status, postage paid, and the movement of mail through processing and delivery. With this information at their fingertips, business mailers can effectively communicate with their customers regarding the status of their mailings. As a result, business mailers are able to use the system and its information to strengthen relationships with existing and potential new customers. For details on viewing postage statements and other mailing information, see Section 3.3, "Program Overview."

The *PostalOne!* system lets you view and print reports about mailings. These reports are the Critical Entry Time and Shipping Summary (eDropShip participants only) reports. For details about the reports, the information they contain and how to run them, see Section 3.4, "Working with Reports."

If your company is enrolled in the *PostalOne!* program and has been given access, you are ready to start realizing the benefits of the system. Use this guide to learn how to use the wide range of functionality available throughout the system.

3.1 System Basics

This section explains the basic functions of the system such as how to log on and off, how to update your personal profile information (including changing your password), how to get your password reset, and how to send feedback, report problems or get additional help from the *PostalOne!* Customer Care Center.

3.1.1 Logging on and off

Before you can use the *PostalOne!* system, log on with your unique username and password.

To log on:

Open a Web browser and go to the *PostalOne!* logon page (https://www.uspspostalone.com/postal1/). Enter your username and password, then click **I AGREE**.

To log off, at the top or bottom of almost any *PostalOne!* system page, click **Logout**.

3.1.2 Editing Your Personal Profile

The *PostalOne!* personal profile stores user name, address, password, and company information.

To edit your personal profile:

At the top of most *PostalOne!* system pages, click **Personal Profile**. You can change the password, mailing address, and e-mail address. To change any other information, contact your site administrator. Click **update personal info**.

3.1.3 Resetting Your Password

If you know your current password and simply want to change it, see "Editing Your Personal Profile" (above). If you forgot your password or it has expired, the password must be reset before you can log on again.

To reset your password:

Contact the *PostalOne!* Customer Care Center at (800) 522-9085 (for additional details, see "Sending Feedback" below). They will reset it for you and give you a temporary password. After you log on with the temporary password, the system prompts you to change the password and log on again.

3.1.4 Sending Feedback

To suggest system changes, report system failures, or get help resetting a password, contact the *PostalOne!* Customer Care Center.

To send feedback or get help:

Call (800) 522-9085. Alternatively, at the top or bottom of almost any *PostalOne!* system page, click **Feedback**. Enter your name, telephone number, e-mail address, requester status, and the type of feedback being submitted. Enter your feedback or question in the appropriate fields. Click **Submit**.

For other ways to contact the Customer Care Center, go to http://www.usps.com/postalone/contact.htm.

3.2 Validating and Transferring Mail.dat Files

Before you validate and send your Mail.dat files to the *PostalOne!* system, you should ensure that your system meets the necessary prerequisites. For example, the system should have enough memory available for the size of files you will send, and it should have the proper software installed. Some of the latest versions of Microsoft Windows (such as XP) do not support the needed Java software that the File Validator uses. This is evident if you do not see the "All folders" and "File Contents of" panes on the File Validator page. For details about these technical requirements, see the *PostalOne! Technical Guide*. If the system meets these requirements, you are ready to validate and transfer your Mail.dat files. The sections below explain how to do this.

3.2.1 Validating Mail.dat Files

The File Validator checks your Mail.dat files to ensure that all *required* fields are populated and contain the *correct character format*. It also checks optional fields for correct character formatting. This section explains how to use the File Validator feature. Using it improves the likelihood that your Mail.dat jobs are successful. The sections below outline steps for validating Mail.dat files, transferring files, checking job and file upload status, and working with the validation log.

Before validating your files, you can customize the Validation.log file name and location by clicking **Validation Log File**. For more information, see Section 3.2.2, "Saving Validation Results."

To validate your Mail.dat files:

On the left menu bar, click **File Validator**. The File Validator page opens. If you see a Security Warning pop-up box, click **Yes** to load the File Validator on your system as a temporary file. Select the folder in which your Mail.dat files are located, select the job header file you want to validate. You can select multiple files if you wish. To begin the validation, click **Validate File(s)**. If your job passes the file validation process, a message appears indicating that the validation was successful. If your job fails the validation process, an error message appears. To determine why the validation failed, write down the message, then see the `C:\Validation.log` file (or the file name and location to which you may have changed it). Click **OK** to close the message. If you are validating multiple files, you will receive a success or failure message after each file is validated.

3.2.2 Saving Validation Results

The File Validator creates a log file by default as `C:\VALIDATION.log` each time you perform a file validation. You can customize the log file's name and location, thus, creating a type of audit trail of all Mail.dat jobs and providing a quick reference to errors you have encountered in the past. Over time, you can identify and correct potential errors before you begin the validation and transfer process.

NOTE: If you leave the validation log file name and location as the default values, the log information for the current validation is appended to the end of the file each time.

To customize the name and location of the log file before you run the File Validator:

While on the File Validator page, click **Validation Log File**. Locate and select the drive and folder in which you will save the file. Enter the name of the file in the **File name** box. Click **Save**. If a file of the same name exists in that folder, you will see a prompt asking whether you want to replace the file. The File Validator does not actually replace the file. Click **Yes** to append validation information to the end of the existing file. A File Transfer dialog box displays a message confirming the name and location of the validation file that will be saved. Click **OK**. The file is not actually saved yet. It is saved when you next run the File Validator.

3.2.3 Transferring Mail.dat Files

The File Transfer tool allows quick transmission of Mail.dat files to the *PostalOne!* system. This reduces, and ultimately eliminates, paper presort documentation that was required by the Postal Service, resulting in savings for both the Postal Service and its customers. Before transferring your jobs to the *PostalOne!* system, we recommend that you validate your files. This increases the likelihood that your jobs will transfer successfully. For details, see Section 3.2.1, "Validating Mail.dat Files."

NOTE: To transfer jobs using the batch processor, see Section 3.2.5, "Using the NT and UNIX Batch Processor."

To transfer Mail.dat job files:

On the left menu bar, click **File Transfer**. The File Transfer page opens. You may see a File Transfer Disclaimer stating that the information you are about to submit is true and can be monitored. To proceed, click **I Accept**. On the left, select the folder in which your Mail.dat files are located. On the right, select the job header file(s) you want to transfer. To begin the transfer, click **Transfer file(s)**. In the **File Transfer Certification** dialog box, click **I Accept** to continue. After your job is transferred, a message indicating the transfer status appears. Click **OK** to close the message. To check the status of your transferred jobs, click **Transfer Summary**. For more information, see Section 3.2.4, "Checking Job and File Upload Status."

3.2.4 Checking Job and File Upload Status

After you have transferred your Mail.dat jobs, use the Transfer Summary tool throughout the verification process to track the status of mailings. It lists information about the status of all jobs and files you have transferred, including when they were transferred. It also lists detailed error messages for files that failed to transfer. Using this tool gives you detailed insight into the status of your mailings, enabling you as a preparer to more effectively communicate job status with your customers.

To check job and file upload status:

On the File Transfer page, click **Transfer Summary**. The Job Status page opens. Initially, recently transferred jobs *may not* appear. To update the Jobs column, click **Refresh.** To check individual file upload status, click the Job ID in the Jobs column or enter the Job ID in the **Search Job ID** box, then click **Search**. To view the status of a file's progress, click the file name in the File (Click for Errors) column. A message box displays error details.

NOTE: If your job is reported as "failed," see the online user manual for detailed error message descriptions and troubleshooting tips.

3.2.5 Using the NT and UNIX Batch Processor

Batch processing allows you to schedule file transfers to take place automatically. Once batch processing is set up, you do not need to be present for the file transfer to take place. This capability requires additional infrastructure and configuration work. When using the Batch Processor, the *PostalOne!* servers return file transfer/upload status feedback to the sender’s workstation automatically. The feedback information (receipt file) is either a character delimited ASCII text or XML format. You can load the receipt file into a spreadsheet or a database for storage and viewing. It saves a receipt file in the same directory that contains your mailing jobs.

For more information about requirements and setting up and using the NT or UNIX Batch Processor, see the *PostalOne! Technical Guide* or the online user manual.

3.2.6 Searching for File Transfer Metrics

The Metrics Search provides access to metrics that help you identify important mailing trends. You can use this information to identify ways in which you can improve your experience using the *PostalOne!* system. For all jobs associated with a specific Job ID, Mailing Facility, Status type, or Transmission Date, the Metrics Search lists Transmission Dates, Transmission Times, Mailing Facilities, Types, File Names, Job IDs, Number of Files, Time to Load, File Size, Results, and GCA Versions.

For example, you can use it to identify the optimal file size and transmission time for submitting your jobs. In addition, you can access detailed error descriptions, which will help you identify common problems and avoid them in future file transmissions.

To search for file transfer metrics:

On the left menu bar, click **Metrics Search**. On the Metrics Search page, enter your search criteria, then click **Search**. The page displays the information. To open the Metrics Error Report and read error descriptions, click the result code in the Result column.

3.2.7 Viewing File Transfer Metrics

The file transfer metrics displays transfer information to help you identify important trends. You can use this information to identify ways to improve your experience using the *PostalOne!* system. For example, it can help you identify and later avoid commonly occurring file transfer problems, which helps increase your file transfer success rate. These metrics may include error messages explaining why a job failed validation. File transfer metrics include both successful and failed jobs.

To view file transfer metrics:

On the left menu bar, click **Metrics - File Transfer**. The Metrics–File Transfer page opens. Enter a starting and ending date for the metrics, click a report type, then click **Search**. The metrics report displays.

NOTE: To quickly locate a specific item, use the browser's Find feature (press CTRL+F and in the **Find What** box, enter the term, then click **Find Next**).

3.3 Viewing Postage Information

You can use the Postage Statement Wizard software, which is external to the *PostalOne!* system, to generate paper postage statements. For all other tasks, including electronic submission of postage statements, you can use the *PostalOne!* system. The sections below explain postage statement functionality.

3.3.1 Creating a Manual Statement

The Submit a Form page will allow you to use the *PostalOne!* system to submit a form electronically to the U.S. Postal Service™. After a postage statement is submitted, it is not finalized until you take the mailing and the Mailing Group ID to the participating Post Office™ for a BMEU clerk to approve and bill. All postage statements submitted using this feature appear on the Dashboard. For more information on the Dashboard, see Section 3.3.2, Using the Dashboard. The *PostalOne!* system currently allows you to submit the following domestic postage statements:

- PS Form 3541 – Periodicals
- PS Form 3541 – Combined Periodicals
- PS Form 3600 - First-Class Mail
- PS Form 3600 - Priority Mail
- PS Form 3602 - Standard Mail
- PS Form 3605 - Bound Printed Matter
- PS Form 3605 - Parcel Post
- PS Form 3605 - Media Mail or Library Mail

To submit a postage statement:

On the left menu bar, click **Submit a Form**, then click the type of form to submit.

Search for the permit number you want to use for the mailing agent. Click **Continue**. If necessary, click the permit number in the Permit Search Results list. Search for or enter the mail owner/publication permit. For combined Periodicals mailings, enter or search for the permit that will pay for an individual mailing. Enter Edition, Issue Date, Advertising Percentage, and the copy weight. Repeat until all publications have been entered. You will have to enter each postage statement in the order the statements are listed on this page. Click **Continue** to go to the next page. For all other postage statements, enter or search for the permit that will pay for the mailing (Permit Holder) and the mailing owner's permit (Mail Owner). Enter the number of pieces, weight, processing category, and other information about the mailing. Click **Continue** to go to the next page.

On the Account Verification page, review the permit information to ensure the correct permit is used. Next, complete the Mailing Characteristics section. When you have completed this section, click **Continue** to go to the next page. On the Postage Statement Entry page, enter the specific details of your mailing, including Customer Reference ID number, the Statement Sequence number, number and type of containers, and number of pieces and/or pounds for each rate claimed. Click **Continue**. Enter your name verifying that you do intended to submit the postage statement, and complete any other information. Click **Continue**.

On the Review page, ensure all information about your mailing is correct. Click **Submit** to send the postage statement to the *PostalOne!* system. For combined mailings, you must repeat all steps after permit entry until all postage statements are complete. Once all postage statements have been entered, review the summary of the postage statements, then click **Submit**. To print the confirmation page, for combined mailings, click the Transaction Number, then click your browser **Print** button. For all other mailings, just click your browser **Print** button.

3.3.2 Using the Dashboard

The Dashboard is a streamlined portal for accessing the wide range of mailing information available throughout the *PostalOne!* system. Through the Dashboard, you can clearly identify the groups and information you want to view by searching for specific groups. The Dashboard displays all jobs associated with the selected provider location within the last two weeks (the default time period). Finalized (billed) jobs do not display on the Dashboard by default; users must search for jobs with the finalized status to view those jobs.

NOTE: The Dashboard includes only mailing documents submitted electronically. Hard copy postage statements are not listed on the Dashboard. If a Mail.dat job fails transmission to the *PostalOne!* system, that job will not appear on the Dashboard.

To use the dashboard:

On the left menu bar, click **Dashboard**. To search for a specific job or jobs, enter search criteria, then click **Search**. The page displays all jobs meeting your search criteria. You can search for a job using Location ZIP Code, Qualification Report Status, Mailing Group, Mailer's Job Number, (postage statement) Status, Permit Number and/or Permit Type, and Begin and End Dates. See the online Help system for definitions of these fields.

To view a postage statement, for most postage statements, click the **PS#** link. Most PS links include the class of mail. To view a Periodicals postage statement contained within a consolidated Periodicals postage statement, click the **Details** link next to the consolidated statement, then click the individual statement you want to view on the Postage Statement Details page. To view Multiline Optical Character Reader (MLOCR) or combined non-Periodicals mailings, click the **Master Statement** link for the postage statement. To view an individual statement within the master statement, click the **PS #** link on the Master Statement page. For more information, see Section 3.3.3, "Viewing Postage Statements."

To view a qualification report, if available, click **Qualification Report** for the job. If multiple qualification reports are available, but you know a container ID within the desired qualification report, enter the Container ID in the box, then click **Find a Qualification Report**. For more information, see Section 3.3.8, "Viewing the Qualification Report." To view the Version Summary Report, click Version Summary Report. For more information, see Section 3.4.7, "Viewing the Version Summary Report".

To view a reconciliation report, click **Reconciliation Report** for the job. For more information, see Section 3.3.11, "Viewing the Version Summary Report". If participating in the eeDropShip program, click **Shipping Summary Report** to view induction reports. For more information, see Sections 3.4.3, 3.4.4, and 3.4.5. To view MLOCR Reports, click the report name under the Master Statement link. For more information, see Section 3.4.6, “Viewing MLOCR Reports”.

To download a copy of the postage statements currently displayed on the Dashboard, click **Download Transaction List**. Select the format for the download, then click **Download**. Click **Save**, navigate to the location to which the file should be saved, then click **Save** again.

To view an overview of all postage statements still requiring processing, click **Show Workload**. Click the number of postage statements in a category to display the Dashboard with just the selected postage statements displayed.

3.3.3 Viewing Postage Statements

To provide you with real-time insight into your mailings, the *PostalOne!* system lets you view electronic postage statements to check the postage paid for your mailings.

To view electronic postage statements:

Click **Dashboard** on the left menu bar, then search for the job. For instructions on doing this, follow the steps in Section 3.3.2, "Using the Dashboard." For most postage statements, click the **PS #** link for the appropriate job. The PS# link will only be active if the statement is available. For Periodicals, only consolidated postage statements are available on the Dashboard. To view a Periodicals statement contained within a consolidated postage statement, click **Details** on the Dashboard, then click the specific statement you want to view on the Postage Statement Details page. To view Multiline Optical Character Reader (MLOCR) or combined non-Periodicals mailings, click the **Master Statement** link for the postage statement. To view an individual statement within the master statement, click the **PS #** link on the Master Statement page. The postage statement opens.

To print a copy of the postage statement, click the browser's **Print** button. To cancel the postage statement, click **Cancel**. For more information, see Section 3.3.4, “Canceling Postage Statements”. To view the postage statement register, click **Register**. For more information, see Section 3.3.5, “Viewing the Postage Statement Register”. To view rates claimed by piece weight, click **Piece-Weight Information**. For more information, see Section 3.3.6, “Viewing Piece Weights.” When viewing a master postage statement, to view a postage summary limited to a particular payment type, click a payment method link on the page. For more information, see Section 3.4.6, “Viewing MLOCR Reports”.

3.3.4 Canceling Postage Statements

The postage statement page also allows you to cancel postage statements previously submitted electronically to the *PostalOne!* system. You can only cancel postage statements in the UPD or NAP stages, and canceling a consolidated statement using this feature cancels all postage statements contained within the consolidated statement.

NOTE: Postage statement cancellation cannot be reversed; you can only resubmit the postage statement in a new job.

To cancel a postage statement:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the postage statement. For detailed steps on searching for jobs, see Section 3.3.2, “Using the Dashboard”. Open the appropriate postage statement. For more information, see Section 3.3.3, “Viewing Postage Statements”.

Click **Cancel**. Review the statement to ensure you are canceling the correct statement. Using this feature to cancel a consolidated postage statement also cancels all statements contained within the consolidated statement. To cancel a combined postage statement, cancel each individual postage statement within the combined statement. To cancel the statement, click **Cancel** at the bottom of the review page. In the

Confirmation dialog box, click **OK**. A page appears stating the postage statement cancellation was successful.

3.3.5 Viewing the Postage Statement Register

The register provides mailing details for each entry point included in postage statements submitted electronically. Each register lists every entry point facility, applied entry discounts, the number of pieces accepted at the facility, the number of pounds, and the final postage for each facility. Register information is only available if electronically-submitted files included register information.

To view register information:

Click **Dashboard** on the left menu bar, then search for the job. For instructions on doing this, follow the steps in Section 3.3.2, "Using the Dashboard." Open the postage statement. On the Postage Statement page, click **Register**. To view the register for one postage statement within an MLOCR or combined non-Periodicals mailing, users should open the master postage statement, click the individual statement, then click the **Register** link on the individual statement. For more information on the Postage Statement Page, see Section 3.3.3, “Viewing Postage Statements”. To view entry point details, click a facility name in the Entry Facility Name column. For more information, see Section 3.3.7, “Viewing Entry Point Details.”

3.3.6 Viewing Piece Weights

The Pieces Weights page separates mail pieces by piece weight, and displays the number of pieces claimed in each rate category. Not all postage statements include piece weight information.

To view piece weight information:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the register. For detailed steps on searching for groups, follow the steps in Section 3.3.2, “Using the Dashboard.” Open the postage statement. On the Postage Statement page, click **Piece-Weight Information**. For more information on the Postage Statement Page, see Section 3.3.3, “Viewing Postage Statements”.

3.3.7 Viewing Entry Point Details

Viewing entry point details displays information associated with a selected facility. This includes Piece Weight, Advertising Percentage, 5-Digit Automation, 5-Digit Nonautomation, 3-Digit Automation, 3-Digit Nonautomation, Basic, Basic Nonautomation, Total Copy, Total Piece, Total Pound, and Total Postage. In addition, you can access detailed container information for containers originating from a select facility.

To view entry point details:

Open the Postage Statement Register for the statement (see Section 3.3.5). Click a facility name in the Entry Facility Name column. The Entry Point Detail page opens. To sort entry point details by a specific field, click a column heading. To view the Qualification Report for a particular container, click the Container Name. For more information, see Section 3.3.8, “Viewing the Qualification Report”.

3.3.8 Viewing the Qualification Report

Qualification reports summarize the containers included in a group of postage statements submitted electronically. It details the destination ZIP Code, rate and sortation levels, origin ZIP Code, and total pieces in each container.

To view a qualification report:

Click **Dashboard** on the left menu bar, then search for the job. For instructions on doing this, follow the steps in Section 3.3.2, "Using the Dashboard." To view the report, click **Qualification Report** for the appropriate job. If multiple qualification reports are available but a container ID within the desired qualification report is known, enter the Container ID in the box, then click **Find a Qualification Report**. If multiple qualification reports are available, click the specific qualification report you want to view on the Qualification Report List page.

To limit the containers displayed to one or more specific containers, click a choice in the **Search by** list, then enter your criteria in the **Starts with** box. Click **Search**. To view all containers again, click **Reset**. To reorder the displayed containers, click a column heading. If the qualification report has more containers than can display on just one page, click **Next Page** or a number to view another page. To view package details for a particular container, click **Container Search**. For more information, see Section 3.3.9, “Searching for a Container.” To view the Summary ZIP Destination Report, click a Container ZIP Code. For more information, see Section 3.4.6, “Viewing MLOCR Reports”. To view version information for the containers in the qualification report, click **Version Summary Information**. For more information, see Section 3.3.11, “Viewing Version Summary Information”.

3.3.9 Searching for a Container

Performing a container search allows you to view detailed information about specific containers and packages in a mailing submitted electronically. Through the container search, you can see containers, containers within a pallet, packages, pieces, and weights that are part of a specific mailing. Container searches are not available for all mailings.

To search for a container:

Click **Dashboard** on the left menu bar, then search for the job. For instructions on doing this, follow the steps in Section 3.3.2, "Using the Dashboard." Click **Qualification Report** for the appropriate job. If multiple qualification reports are available, click the appropriate one. For more information on the Qualification Report, see Section 3.3.8, “Viewing the Qualification Report.” Click **Container Search**. Specify the search criteria, then click **Search**. You can search for containers using the following criteria: Entry Point ZIP Code, Destination ZIP Code, Type, Level, and Container ID.

To view all containers within a pallet, click **Pallet**. To view a list of packages associated with a container, click a Container ID number. For more information, see Section 3.3.10, “Viewing Container Details.” To view a list of containers in a pallet, click **Pallet** in the Container ID column.

3.3.10 Viewing Container Details

The Container Details page displays the details of each package within the selected container, and includes a summary of the mailing group and the container that contains the displayed packages.

To view container details:

Perform a container search (see Section 3.3.9). If the container is in a pallet, click **Pallet** in the search results first. Otherwise, click the Container ID. To change the number of records displayed on each page, click a number in the **Show records** list. To reorder the displayed packages, click an underlined column heading.

3.3.11 Viewing Version Summary Information

The Version Summary Information page displays summaries of the mailing group and qualification report, then details the Version ID, Version Name, Description, Weight, Total Pieces, and Cumulative Total Pieces for statements associated with the selected qualification report.

To view the Version Summary Information:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the postage statement. For detailed steps on searching for jobs, see Section 3.3.2, “Using the Dashboard”. Click **Qualification Report** for the appropriate job. If multiple qualification reports are available, click the appropriate one. For more information on the Qualification Report, see Section 3.3.8, “Viewing the Qualification Report.” On the Qualification Report page, click **Version Summary Information**.

3.3.12 Viewing the Reconciliation Report

The Reconciliation Report compares the number of pieces reported and paid on postage statements within a group to the number of pieces reported on a qualification report for the same group. The postage statement information accounts for each individual consolidated statement, provides a total of the line items of each statement, and compares that to the total number of pieces by rate category and total of the qualification reports for the job. Reconciliation reports will only be available for jobs containing at least one qualification report and postage statement.

To view the Reconciliation Report:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the postage statement. For detailed steps on searching for jobs, see Section 3.3.2, "Using the Dashboard". To view the report, click the **Reconciliation Report** link for the appropriate job.

3.4 Working with Reports

The *PostalOne!* system provides you with immediate access to several detailed mailing reports. The sections below explain how to view all available reports.

3.4.1 Viewing the Critical Entry Times Report

Use this report to display the dates and times, known as Critical Entry Times (CET), that mail entered a selected facility and when it arrived at both the Area Distribution Center (ADC) and Sectional Center Facility (SCF). The report displays the Originating CET, Destination ADC CET, and Destination SCF CET.

To view the CET report:

On the left menu bar, click **CET Reports**. Search for the facility for which you want to view CETs in the Facility/Code Name field by doing one of the following: type in the full or partial code or name of the facility or to display all facilities, type a %. Click **Search**. The page displays a list of possible facilities. In the list, click a facility, then click **Search**. The report displays for that facility.

3.4.2 Viewing the Critical Entry Time Changes Report

Use this report to display the Critical Entry Time Changes for a selected facility. The report displays the Facility ID, Facility Name, Orig CET Date Changed, Dest ADC Date Changed, and Dest SCF Date Changed.

To view the CET Changes report:

On the left menu bar, click **CET Reports**. On the left menu bar, click **CET Changes Report**. The page displays the report.

3.4.3 Viewing the Job Report

This feature is only available to users whose corporations participate in the eDropShip program. The Job Summary Report includes a summary of the job (including preparer name and mail class), and lists all appointments scheduled within the job. The Job Summary Report is also available if a user clicks a Job ID on the Appointment Report.

To view the job report:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the postage statement. For detailed steps on searching for jobs, see Section 3.3.2, "Using the Dashboard". Click the **Shipping Summary Report** link for the postage statement that contains the package you want to view. The Job

Report opens. To view the Appointment Report, click an appointment number. Only appointments within the selected job display. For more information, see Section 3.4.4, “Viewing the Appointment Report”. To view the eDropShip Container Detail Report, click an actual arrival date. Only containers within the selected job display. For more information, see Section 3.4.5, “Viewing the eDropShip Container Detail Report”. To view a postage statement, click the **PS#** link. If more than three postage statements are available, click the **Multiple** link to view all of the associated postage statements and then click the statement to view. For more information, see Section 3.3.3, “Viewing Postage Statements”.

3.4.4 Viewing the Appointment Report

This feature is only available to users whose corporations participate in the eDropShip program. The Appointment Report is available if a user clicks an appointment number on the Job Summary Report, and is limited to just those appointments within the selected job. The Appointment Report includes basic appointment information (such as Origin Plant location), a summary of the appointment results, including entry office and scheduled dates of arrival and departure, and mailer information about the job and containers.

To view the appointment report:

Open the Job Summary Report. For more information, see Section 3.4.3, “Viewing the Job Report”. Click an appointment number. The Appointment Report opens. To view the Job Summary Report, click a Job ID on the Appointment Report. To view the eDropShip Container Detail Report, click a total container count on the Appointment Report. For more information, see Section 3.4.5, “Viewing the eDropShip Container Detail Report”.

3.4.5 Viewing the eDropShip Container Detail Report

This feature is only available to users whose corporations participate in the eDropShip program. The Container Report includes a summary of the drop shipment appointment, including appointment number and shipment status, a summary of the job, including preparer name and scheduled arrival and departure dates, and lists all available container information. The Container Report is available if a user clicks a total container count on the Appointment Report or on the Job Summary Report.

To view the eDropShip Container Detail Report:

Open the Job Summary Report. For more information, see Section 3.4.3, “Viewing the Job Report”. Click a total container count on the Job Summary Report. The eDropShipContainer Detail Report opens. To view the postage statement that includes a particular container, click the **PS#** link beneath the Container ID. If more than three postage statements are available, click the **Multiple** link to view all of the associated postage statements and then click the statement to view. For more information, see Section 3.3.3, “Viewing Postage Statements”.

3.4.6 Viewing MLOCR Reports

For Multi-Line Optical Character Reader/Barcode Sorter (MLOCR/BCS) mailings only, three reports are available that display permit and payment information. The reports are:

- The Summary ZIP Destination Report displays the postage payment methods by ZIP Code qualification, and indicates if the Standard Verifier was turned on during the entire run of the mailing.
- The Customer Mail Report lists the profiled permits used in a mailing, and details the rates and total postage for each permit.
- The Postage Summary Report separates line items by postage payment method, and lists the rates and number of line items that claimed each rate.

To view MLOCR reports:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the postage statement. For detailed steps on searching for jobs, see Section 3.3.2, "Using the Dashboard". Click the name of the report to open under the Master Statement link. This is the only way to access the Customer Mail Report. To view a Summary ZIP Destination Report using an alternate method, open the qualification report, then click a Container ZIP Code link to open the Summary ZIP Destination Report. To view a Postage Statement Summary Report limited to a particular payment method, click the associated Master Statement link, then click a payment method link on the page.

When viewing the Summary ZIP Destination Report, click a Tray ZIP Code link to open the qualification report containing the pieces claiming the rate.

When viewing a Postage Statement Summary Report from a link on the Dashboard, click a Postage Summary button to expand the postage summary for the payment method on the button. One button appears for each payment method used in the mailing.

3.4.7 Viewing the Version Summary Report

The Version Summary Report page displays summaries of the mailing group and qualification report, then details the Version ID, Version Name, Description, Weight, Total Pieces, Rate Levels, and Cumulative Total Pieces for statements associated with the selected qualification report. Reports for Periodicals count copies instead of pieces, and include advertising percentage.

To view Version Summary information:

Click **Dashboard** on the left menu bar. If necessary, search for the job containing the postage statement. For detailed steps on searching for jobs, see Section 3.3.2, "Using the Dashboard". Click **Version Summary Report**.