

PostalOne! Mail.dat Client

This document is intended for *PostalOne!* users who want to know more about using the *PostalOne!* Mail.dat Client to transfer electronic documentation. It assumes that the reader is familiar with the prerequisites for generating Mail.dat 09-1 file sets and with using the Mail Manager Mail.dat Wizard.

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This document refers to material from the following sources:

- Appendix A of the *Postal Service Mail.dat Technical Specification*, version 6.2
- Chapter 4 of *Electronic Documentation and Intelligent Mail; Ready, Set, Go!*; version 1.8
- *Intelligent Mail Full-Service & Electronic Documentation Checklist*, June 2009
- *User Access to Electronic Mailing Information and Reports Guide*, version 4.1
- *Intelligent Mail Full-Service Checklist*, version 6.0

To obtain them, visit <https://ribbs.usps.gov/index.cfm?page=intellmailguides> and <http://ribbs.usps.gov/index.cfm?page=intellmailgateway>

NOTE *The examples in this document use version 20.0.0 of the PostalOne! system. Mail.dat files transferred to PostalOne! conformed to version 09-1 of the Mail.dat standard.*



Technical Support Information

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What's New

The *PostalOne!* Mail.dat Client is part of a sweeping update of the USPS Business Mail online presence. The changes to *PostalOne!* include:

- Support for Mail.dat 09-1 and Intelligent Mail Full Service
- Customer-directed and paperless enrollment processes. Online forms replace the PS Form 1357-C and the Participation Agreement.
- The Business Customer Gateway replaces the separate Owner and Preparer interfaces (although the roles remain).
- The Mail.dat Client is a desktop application that handles file validation and transfer for Mail.dat 09-1 (and later) file sets. It operates in both interactive and batch modes.
 - The Mail.dat Client batch mode does not require a security certificate.
 - The Mail.dat Client processes .zip files.
- The Test Environment for Mailers (TEM), provides a testing environment that mirrors the production environment and is accessible through the same gateway. The CAT server continues to exist as a testing ground for the next release.

The *User Access to Electronic Mailing Information and Reports Guide* contains more information about the changes in *PostalOne!*

While the focus of this document is the *PostalOne!* Mail.dat Client, there will be references to these other changes as the need arises.

Purpose of the Mail.dat Client

Mailers who intend to implement Intelligent Mail Full Service MUST use the Mail.dat Client to validate and transfer their Mail.dat file sets to *PostalOne!* Here's why.

Intelligent Mail Full Service requires data structures that the Mail.dat standard did not support until version 09-1. When it came time to incorporate support for version 09-1 into *PostalOne!*, the USPS, projecting a resultant increase in data volume, sought an approach that would conserve its bandwidth without compromising performance. The result was the Mail.dat Desktop Client.

It is possible that the combination of your data transfer requirements and mailing volume make using Mail.dat 09-1 unnecessary. However, should the USPS decide to end its support for version 08-2, all *PostalOne!* users who use Mail.dat to transfer files will either have to migrate to the then-current version or choose another transfer method. For these users, evaluating the Mail.dat Client represents a look into the future.

Generate Mail.dat Files

Before you use the Mail.dat Client, you must generate a Mail.dat file set. This section outlines the steps in the process using BCC Software's Mail Manager products.

Mail Manager products use a wizard to generate and update Mail.dat file sets from presort data. The basic Mail.dat Wizard consists of seven pages. Both the presort characteristics already defined and the entries you make in the Wizard affect the final page sequence and count. For example, if you performed a Periodicals presort, a Periodicals page is added to the Wizard. Similarly, if you indicate you are using the Intelligent Mail barcode in the Wizard, the IMB page appears.

The Mail.dat Wizard identifies data fields required by Mail.dat with an asterisk (*) and fields required by *PostalOne!* with two asterisks (**). If you question whether a field is required, the designations on the Wizard pages take precedence over either this document or Mail Manager documentation.

To accommodate the new Mail.dat standard, the Mail.dat Wizard includes the following new fields:

- Version (General page/Job section): Use this drop-down box to select version 08-2 or 09-1 of the Mail.dat standard. See Figure 1 on page 3. (Required)
- Intelligent Mail Range Table (Database page): Selecting this option adds the .imr file to the Mail.dat file set. This file identifies the mailing class, lowest and highest Mailer ID and serial number combinations on the set of Intelligent Mail barcodes, Mailer IDs and CRIDs (Customer Registration IDs that

identifies each mailing location) of the Mail Owner and Preparer, and a service level indicator (Full Service, Basic, POSTNET, Other).

- Facility ID (Segment page): Enter the CRID of the mailing verification facility. (Required by *PostalOne!*)
- Full Service Participation (Segment page): Select Full Service, Basic, POSTNET, or Other from the drop-down box.
- CSA ID (Segment page): Customer Service Agreement ID
- Mailer ID and CRID for Mailing Facility (required), Permit Holder, and Mail Owner (Postage—Principal Component)

NOTE

Always refer to Mail.dat Wizard pages by name (*Setup, Segment, Mail piece, etc.*) not by page number. The number of variations in page count and sequence makes page numbers an impractical means of identification.

Mail.dat 09-1 Wizard - General (Page 2 of 11)

Mail.dat

User License Code* JQZX

File Set ID* 0083

Job ID* 00000131

Version* 09-1

User's Email Address* jqm@xz.com

Preparer* XZ Mailing

Location C:\XZ\MM2010\MailDat\

Job

User's Job Number 9999

Name/Title & Issue* TEM_Test1

Contact Name* JQ Mailer

Contact Phone Number* 555-555-5555

Segmenting Criteria* US

PostalOne! Preparation

* Required fields.
*** PostalOne! Required fields.

Back Next Cancel Help

Figure 1: Select a Mail.dat version in the Mail.dat Wizard General page.

Prerequisites. You must meet the following requirements to run the Mail.dat Wizard:

- **IDEAlliance User License Code (ULC):** For current information, prices, and an interactive application, visit *Become a Mail.dat User* (http://www.idealliance.org/industry_resources/production_and_supply_chain/mail.dat/become_a_mail.dat_user) on the IDEAlliance Web site and click "Download Mail.dat Users License Code Application Form." Once you enter a ULC and check *PostalOne! Preparation*, the Wizard monitors your compliance with both *PostalOne!* and Mail.dat requirements. You will not be able to leave a page without completing all required entries.
- Presorted mailing
- Mail Manager 2010 with the Mail.dat Option or Mail Manager FS

Procedure. Mail.dat file generation starts from the Mail Manager *Presort Summary Printing Menu* window. After presorting a list, remain in that window and perform the following procedure:

1. Consult Table 1 on page 5 for a description of information typically associated with an Intelligent Mail Full Service mailing.
2. Click **Tools > Mail.dat** to launch the Mail.dat Wizard. Use the *Setup* page to identify the configuration or settings file for your job, to save your completed settings to a file, and to choose between creating a new file set or adding to an existing, unsubmitted file set.
 - Set the *File set status* field appropriately:
 - **Original Mail.dat job:** Generates a new Mail.dat file set from a presort.
 - **Update Mail.dat job:** Modifies a Mail.dat file set associated with a saved presort. (The Wizard cannot process Mail.dat files independently of a presort, therefore it cannot be considered a Mail.dat editor.)
 - **Delete Mail.dat job:** Marks a Mail.dat file set associated with a saved presort for deletion from *PostalOne!*
3. Complete the remaining pages. Table 1 lists fields typical for an Intelligent Mail Full Service mailing. Information on additional pages and fields appears in your Mail Manager documentation. In particular, pay attention to the following:
 - Enter your ULC in the *Mail.dat* section of the *General* page. Enter NONE if you have not obtained a ULC. A ULC of NONE results in an error message should you try to select the *PostalOne! Preparation Option* checkbox.
 - If you have entered a ULC, check the *PostalOne! Preparation Option* checkbox in the *Job* section of the *General* page.
 - Complete any field marked with * (Mail.Dat requirement) or ** (for *PostalOne!*).
 - On the Segment page, make sure that the *Verification Facility ZIP+4 Code* and the *Facility ID* are correct for the *Verification Facility Name*. They should match the facility name, ZIP+4 Code, and ID in your *PostalOne!* profile.
 - Neither the Mail.dat standard nor *PostalOne!* require using the *Container Information* or *Containers* pages. However, the examples in this document manipulate the payment status fields in those pages to generate and cancel postage statements. If you are completing the original version of either page for *PostalOne!* testing, set the *Status* drop-down box to **Preliminary**. This will set the stage for the edits required for certification.
If you use the container screens, you must enter dates in the "Actual Date and Time" column for the Postage Statement and Shipment rows.
 - Use the appropriate Permit Holder permit number for the *Postage—Principal Component page Permit Number* field.
 - Mail Manager does not generate the following Mail.dat files:
 - .icl (International Container Label)—for international mail
 - .icr (inkjet/Container Relationship)
 - .plr (Package Label—Canadian only)
 In general, these files are optional. If your mailing requires these files you will need a tool that supports them.
4. Note the following information for use with *PostalOne!*
 - Name and location of the .hdr file
 - Job ID: This generated field on the *General* page is an important search criterion within *PostalOne!*

5. Use **File > Save and Exit** to leave the *Presort Summary Printing Menu* and retain access to the mailing. You cannot use the Mail.dat Wizard independently of a presort.

NOTE

The number of choices in the Mail.dat Wizard may seem intimidating, as it is designed to accommodate a wide variety of mailings. If you find non-required fields that you do not understand, they may represent mailing options that you do not use. Consult the Mail Manager documentation, USPS Publication 32 (<http://www.usps.com/help/glossaries.htm>), and BCC Technical Support to determine if a field applies to the mailing job you are processing.

Table 1:Mail.dat Wizard requirements

Page/ Section (if applicable)	Information	Description
Setup	Load saved Mail.dat settings	Check if you want to use a saved Mail.dat Wizard session.
	Settings	Name of the settings file to load.
	Save Mail.dat settings	Check to save this session's settings to a file, which you name after completing the Wizard.
	File set status	Choose one of the following: <ul style="list-style-type: none"> • New Mail.dat job • Update Mail.dat job • Delete Mail.dat job
	Generate Mail.dat file set. / Add additional presorts to existing Mail.dat file set.	"Add additional presorts..." may apply if there is more than one presort per single truck delivery.
General/ Mail.dat	User License Code	Mail.dat [®] User License Code.
	File Set ID	Assigned by Mail Manager
	Job ID	Assigned by Mail Manager.
	Version	Select "09-1" from the drop-down list if using the Mail.dat Client.
	User's Email Address	Email address of user
	Preparer	Company generating the Mail.dat files
	Location	Folder or directory to store the Mail.dat files

Table 1:Mail.dat Wizard requirements (continued)

Page/ Section (if applicable)	Information	Description (continued)
General/ Job	User's Job Number	Internal identification for the user's benefit
	Name/Title & Issue	For Periodicals, the publisher name followed by the periodical title and issue number. For others, a general title to identify the mailing.
	Contact Name	Mail.dat database administrator
	Contact Phone Number	Mail.dat administrator telephone
	Segmenting Criteria	Although Mail Manager does not support multiple segments, you must still make an entry such as "US Mail."
	PostalOne! Preparation	Check if submitting Mail.dat files to <i>PostalOne!</i> [®]
Database	Package Quantity Table OR Manifest Individual Table	Package Quantity Table is automatically checked if you did not presort a manifest mailing (Variable Sort). It refers to the Package Quantity (.pqt) file in the Mail.dat database. This file details the quantity, rate, weight, and package destination for every package in a container. If you did presort a manifest mailing, you must choose between the Package Quantity file, and the Manifest Individual Table (.mir) file.
	Intelligent Mail Range Table (version 09-1 only) OR Piece Detail Table	One of these is required to describe the mailing at the package level. If the serial numbers are sequential and there is no loss owing to spoilage or waste, the Intelligent Mail Range Table is usually sufficient.
	Save Mail.dat database in unique folder	Saves a job in its own folder under BCC\product\Maildat\
	Zip Mail.dat database	The Mail.dat Client can transfer.zip files.

Table 1:Mail.dat Wizard requirements (continued)

Page/ Section (if applicable)	Information	Description (continued)
Segment	Description	Describes a mailing segment. The Mail.dat standard requires an entry even for single-segment mailings.
	Verification Facility Name	Name of facility used for verifying mailings.
	Verification Facility ZIP + 4	ZIP Code™ where mailing is verified.
	Facility ID	CRID of the Verification Facility
	MoveUpdate Method/Date	Indicates how and when the list was updated for compliance with the Move Update standards. Select from the drop-down list: <ul style="list-style-type: none"> • None • ACS™ • NCOALink® • FASTforward® • Mailer • Endorsements • Multiple • Simplified/Occupant/Exceptional Address
	ZIP+4 Encoding/Walk Sequencing Dates	These dates reflect Mail Manager data from CASS encoding and, if applicable, Walk Sequencing. The Wizard cannot update them.
	Full Service Participation	Select from the drop-down list: <ul style="list-style-type: none"> • Full Service • Basic • POSTNET • Other Selecting any option adds the Options page to the Wizard. Selecting Full Service or Basic adds the IMB page as well.
	General Container Information	Check to add the Container Information page, which contains delivery and payment information applicable to all containers.
Detailed Container Information	Check to add the Containers page, where you can modify delivery and payment information for individual containers.	

Table 1:Mail.dat Wizard requirements (continued)

Page/ Section (if applicable)	Information	Description (continued)
Mail Piece	Name	Identifies the mailpiece
	Entry Country	Mail Manager supports US Mail only; non-USPS mail requires a separate segment.
	Type	Identifies the rate type of the principal component. Select the principal component's rate type from the drop-down list: <ul style="list-style-type: none"> • Regular • Non-profit
	Weight	Weight of the principal component, carried over from the Mailing Presort Information window. If you are updating a Mail.dat job, you can modify this field, but you must re-enter the change on subsequent updates.
	Status	Status of the weight information. Select from the drop-down list: <ul style="list-style-type: none"> • Pending • Final
	Source	Source of weight data. Select from the drop-down list: <ul style="list-style-type: none"> • Agent (real time) • Postal (clerk) • Calculated (USPS® formula) • Logical (implied from rate)
Container Information	Postage Statement Date/ Actual Shipment Date	<ul style="list-style-type: none"> • Date that appears on the postage statement • Date the mailing leaves the mailing/agent's facility.
	Container Status	Container payment status: <ul style="list-style-type: none"> • Not Closed • Ready to Pay • Paid • Cancel • Preliminary • Transportation Update • Ready to Accept - CPP • Delete
Containers	Modify individual container data.	Select (right-click) a container and click Modify. A replica of the Container Information page appears, where you can change individual container settings, generating multiple postage statements.

Table 1:Mail.dat Wizard requirements (continued)

Page/ Section (if applicable)	Information	Description (continued)
Tags	Mailer/Mailer Location	If you check Include Container Tag Information, you must enter the mailer name and location, using the abbreviation conventions described here: http://www.usps.com/ncsc/lookups/usps_abbreviations.html .
	Information Line	Prints an information line as the last line of the container tag. If <i>Information Line</i> is selected and this field is left blank, the information line includes the number of pieces in the container, number of packages, and container size. To create custom information lines, refer to the codes in your Mail Manager product documentation. Click the Key button to open the Custom Information Line Elements window and select the elements you wish to include.
	Mailer ID	Required if you check Intelligent Mail Tray/Container Label. Six or nine-digit number provided by the USPS that identifies the entity applying the label.
Postage— Principal Component	Permit Number	Permit number used to pay postage.
	Identifications: Mailing Facility <ul style="list-style-type: none"> • DUNS Number • Mailer ID • CRID 	Standard IDs for the facility that sorts and bundles the mailing. Entries for the Permit Holder and Mail Owner are optional. <ul style="list-style-type: none"> • Dun & Bradstreet number • 6 or 9 digit ID for Intelligent Mail barcodes • Customer Registration ID for mailing location
	Postage Payment Option	Select from the drop-down list: <ul style="list-style-type: none"> • CPP (Centralized Postage Payment) • PVDS (Plant-Verified Drop Shipment) • CAPS (Centralized Account Processing System) • Debit • Other • Billing
	Postage Payment Method	Select from the drop-down list: <ul style="list-style-type: none"> • Alternate Delivery • Cash • Government Permit • Metered, Correct • Metered, Lowest • Metered, Neither • Partial Permit Imprint • Periodicals Pending Permit • Permit • Stamp

Table 1:Mail.dat Wizard requirements (continued)

Page/ Section (if applicable)	Information	Description (continued)
Options/ Package Level Options	Reset Package ID in each container	If this Mail.dat job consists of multiple presorts, you selected the Package Quantity Table on the Database page, and the Package ID field is sequential, selecting this option bases the first Package ID in the new presort on the last Package ID from the previous presort.
Options/ Piece Level Options (requires Piece Detail Record or Manifest Individual Record selection on the Database page)	Use sequential Piece ID	Numbers the Piece ID field in the Piece Detail Record or Manifest Individual Record sequentially beginning with '1.'
	Include Mail piece status	If one of the required files is selected on the Database page and a Mailpiece Status field is in the list, incorporates the contents in the Mail.dat file set.
	Include ACS keyline data	Option to include keyline data based on a keyline field or on an expression.
	Add ACS keyline check digit	Includes a calculated check digit
IMB	Use Track N Trace Intelligent Mail barcode information	Only available if you used Track N Trace to generate barcode data.
	Service Type ID	Select from the list (check all that apply): <ul style="list-style-type: none"> • Full Service • Origin Confirm • Destination Confirm • ACS with Address Service Requested • ACS with Change Service Requested • Traditional ACS with Address Service Requested • Traditional ACS with Change Service Requested • Ancillary Service Endorsement • Business Reply Mail
	Mailer ID	Enter the Mailer ID of the organization that applies the Intelligent Mail barcode, either directly or through an expression.
	Serial Number	If this field is blank, Mail Manager calculates serial numbers. To establish your own criteria, enter a number or expression here.

Visit the Business Customer Gateway

The first step in obtaining the *PostalOne!* Mail.dat Client is to visit the Business Customer Gateway.

PostalOne! is part of a group of services accessed online through a common interface, the Business Customer Gateway. In addition to *PostalOne!* these services include Customer Label Distribution System (CLDS), Facility Access and Shipment Tracking (FAST), and applying for a Mailer ID.

Use the following procedure to visit the Business Customer Gateway

1. Go to the USPS Web site, <http://www.usps.com/>
2. Scroll down until you see the Business Customer Gateway link on the lower right corner.
3. Click **Business Customer Gateway**.

NOTE



Alternatively, use the URL <https://gateway.usps.com/bcg/login.htm>.

The screenshot shows the USPS website interface. At the top, there is a navigation bar with links like 'FIND A ZIP CODE', 'CALCULATE POSTAGE', etc. Below this is a search bar and a 'Track & Confirm' section. The main content area features several promotional banners and service tiles. A blue box with the text 'Link to Business Customer Gateway' is overlaid on the bottom right of the page, pointing to a link in the footer area. The footer contains various links such as 'Site Map', 'Customer Service', 'Forms', 'Gov't Services', 'Careers', 'Privacy Policy', 'Terms of Use', and 'Business Customer Gateway'.

Figure 2: Link to Business Customer Gateway from usps.com

Log On and Log Off

All mailers who plan to transfer Mail.dat 09-1 jobs to *PostalOne!* must qualify to do so. Even those who are in full production mode must have their ability to transfer 09-1 jobs evaluated. (They can continue to transfer live data that conforms to version 08-2.) Mail.dat users must use the *PostalOne!* Test Environment for Mailers (TEM) to certify their ability to transfer and edit data files that conform to version 09-1.

To access the TEM, log on to the Business Customer Gateway. Use the following procedures:

Business Customer Gateway

1. Go to the Business Customer Gateway (See "Visit the Business Customer Gateway" on page 11.):
2. Enter your User ID and password. (Both your User ID and password are case-sensitive. The USPS converted the User IDs transferred from legacy *PostalOne!* accounts to uppercase (CAPS).
3. Click **Sign In**. A "Welcome [user_name]" message appears.
4. Click **Electronic Data Exchange (PostalOne!)** to access the functions that this document discusses. (if you have not yet registered for *PostalOne!* apply for the "Manage Mailing Activity" service. Retry this step upon approval.)
5. Note the separate areas for TEM and Production. During the first testing phase, you will download and use the Mail.dat Client from the TEM section. (This document assumes that you will use the Windows version.)
6. Click **Sign Out** to log off:

NOTE



If you have forgotten your password, you must call the PostalOne! Help Desk, 1-800-522-9085 to request a reset. You will get a temporary password that you must change after your next logon.

Mail.dat Client

Transfer of Mail.dat 09-1 file sets requires the *PostalOne!* Mail.dat Client. Download one version of the Client for each operating system (Windows and Solaris) and *PostalOne!* environment (Production and TEM) that you use. The supported operating system and environment appear on the .zip file's name (Examples: MDRClient-TEM-win32.zip or MDRClient-PROD-win32.zip) and in the window bar of the Client.

Download and Installation

Appendix A of the *Postal Service Mail.dat Technical Specification* contains instructions for installing and configuring both the Windows and Solaris versions of the Mail.dat Client. Use the following steps to obtain and load the *PostalOne!* Mail.dat Client.

1. Create a folder to house the application. The folder name must not contain spaces.
2. Create subfolders for the following data categories:
 - Log file
 - Receipt file
 - Mail.dat files to validate and transfer
 - Mail.dat files that transferred successfully
 - Mail.dat files that failed to transfer

Only the log file folder is required if you do not plan to use batch mode.

3. Sign in to your *PostalOne!* account.
4. Click **Electronic Data Exchange (PostalOne!)**.
5. Click the **Download Client Application** link appropriate to your *PostalOne!* account and operating system. Our examples use the TEM Client for Windows.
6. When asked to Run or Save the file, click **Save**.
7. Save the file to the folder created in step 1.
8. Extract the .zip file to the same folder, preserving its directory structure.

Starting the Mail.dat Client

This is one way to start the interactive version of the Windows Mail.dat Client:

1. Use Windows Explorer to select the folder containing the extracted Mail.dat Client.
2. Double-click **run-mdrclient.bat**.
3. Enter your *PostalOne!* account name and password.
4. Click **Sign In**.

Set up the Log File Location

Follow these steps to designate a location for the log file generated during file validation:

1. Click **Settings**.
2. Select the **Log File Location** tab.
3. Click **Browse** and select the folder you created to house the log files. (Using **Browse** ensures that the path names are entered correctly—the conventions are a hybrid of Windows and Solaris practices and have changed over the Client's development. It also permits folder creation had you not already done so.)
4. Click **OK**.

NOTE



The other folders you created support batch processing, which this document does not cover. See Batch Mode Setup Instructions in Appendix A of the Postal Service Mail.dat Technical Specification for details on using batch mode in both Windows and Solaris.

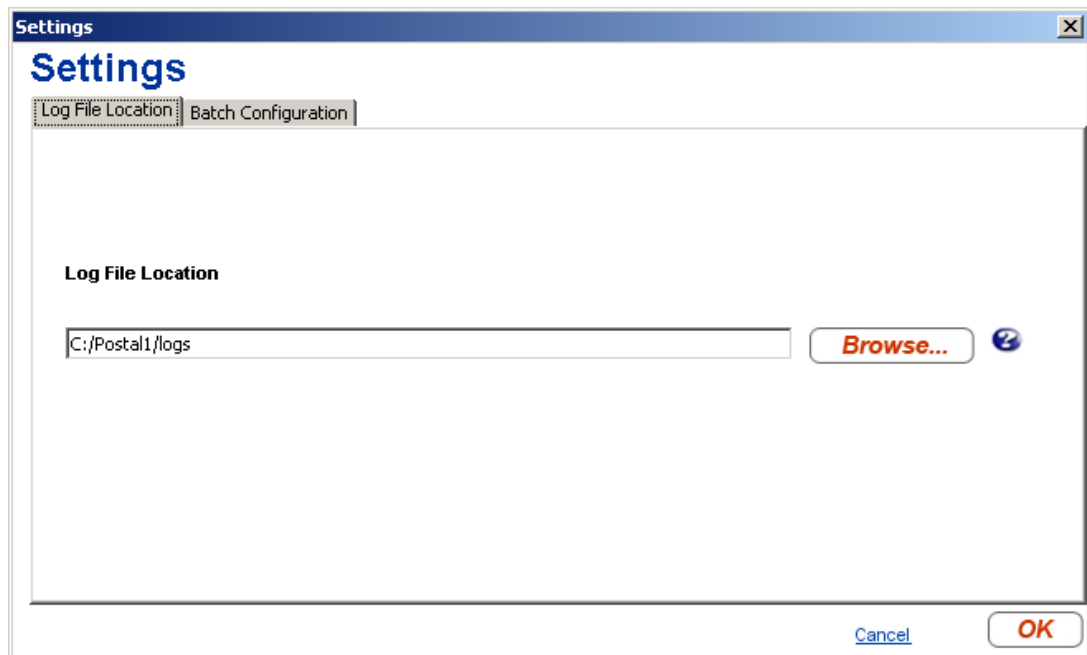



Figure 3: Setting the log file location

Get Online Help with the Mail.dat Client

To access online Help, click any **Help** link. These links are located on the top and bottom of most pages. The Mail.dat Client also incorporates a  button next to key headings.

Transfer Files to the PostalOne! Test Environment for Mailers

This section describes how to transfer a Mail.dat file set to the TEM. Use the TEM to learn the *PostalOne!* interface, to transfer mailing jobs representative of live data, and to familiarize yourself with reporting tools. The TEM is also a good place to learn about the errors that may arise during live data transfer and the means at your disposal to resolve them.

File validation and transfer procedures vary by Mail.dat version. Those who transfer Mail.dat 08-2 jobs will continue to use online file validation and transfer tools. Those who transfer Mail.dat 09-1 jobs use the Mail.dat Client.

Regardless of Mail.dat version, the idea is to use the TEM to become comfortable with *PostalOne!* and Mail.dat before attempting to transfer live data.

Test Environment for Mailers (TEM)	
09-1 Mail.dat	<i>PostalOne!</i> (includes 08-2 Mail.dat and Postal Wizard)
09-1 Mail.dat Guide	PostalOne! Guide
Download Client Application (Windows)	Start Testing - Notify Help Desk
Download Client Application (Solaris)	Go to TEM
Start Testing - Notify Help Desk	
Go to TEM	
Mail.xml	Parcel Return Service (PRS)
Mail.xml Guide	PRS Guide
Start Testing - Notify Help Desk	PRS Process
Go to TEM	Start Testing - Notify Help Desk
	Go to TEM
Electronic Verification System (EVS)	
EVS Guide	
EVS Process	
Start Testing - Notify Help Desk	
Go to TEM	

Figure 4: Electronic Data Exchange-TEM section

Prerequisites. You must meet the following hardware and software requirements before submitting a mailing to *PostalOne!* with the Mail.dat Client. Sections 2.1 and 2.2 of the *Postal Service Mail.dat Technical Specification* describe these requirements in more detail.

- **Mail.dat 09-1 files:** The Client supports Mail.dat 09-1 (and later) file sets, including those compressed into a .zip file. Select the .zip file option in the Database page of the Mail.dat Wizard.
- **Mailer Identification (MID):** You must obtain a Mailer ID to use Intelligent Mail Full Service. Apply online through the Business Customer Gateway.
- **Customer Registration Identification (CRID):** This is the unique identification code that the USPS generates for each location that obtains a service through the Business Customer Gateway.
- **Infrastructure:** Port 443 must be available for secure transactions using the https protocol.
- **Internet access:** The Client requires a fast, continuous connection to support the upload of large file sets. It requires Java 2 Standard Edition (SE) to run, a version of which the USPS provides as part of the Client installation file. The *Postal Service Mail.dat Technical Specification* includes directions for assigning sufficient memory to Java.
- **PostalOne! account.** If you have a ULC, you can prepare your Mail.dat submission for *PostalOne!* but you need a *PostalOne!* account to submit the job.

- **Sufficient RAM to process the Mail.dat files:** See Appendix A->System Requirements in the *Postal Service Mail.dat Technical Specification* for specifications.
- **Software to generate, update, and cancel Mail.dat jobs:** BCC Software has enhanced the Mail Manager Mail.dat Wizard by adding the capability to update and cancel Mail.dat jobs. To use these features, you must use the Wizard to generate the job, setting *Mail.dat file set status* on the *Setup* page to Original. In subsequent sessions, set *Mail.dat file set status* to Update or Delete.
- **Acknowledgement and test scenarios from Help Desk:** Before transferring practice files to the TEM, use the Client's validation tool to evaluate their adherence to Mail.dat standards. (See "Validate Files" on page 15.) When you can produce file sets that consistently pass validation, use the link on the Electronic Data Exchange page to notify the Help Desk that you are ready to do practice transfers. Organize the e-mail as follows:
 - Subject Line: "Full Service Practice" or "eDoc practice"
 - Body:
 - Company name
 - Address
 - City
 - State
 - ZIP Code
 - CRID
 - Contact name
 - Contact phone number
 - Name of Post Office
 - File transfer method followed by service level. (Example: Mail.dat 09-1F for Full Service; Mail.dat 09-1E or Mail.dat 08-2E for use with Intelligent Mail Basic or POSTNET.)
 - Attachment (Full Service only): Full-Service Data Set-up Request Worksheet (Exhibit 1 in the Intelligent Mail Full Service & Electronic Documentation Checklist and Table 2 on page 16)

Begin practice once Help Desk responds with an acknowledgment and a test scenario worksheet (to use once testing begins).

WARNING

It is essential that you not delete the presort that is associated with the Mail.dat files at least until the mailing is either completed or cancelled. Doing so deprives you of access to the Wizard to make further modifications.

Validate Files

The first part of the process checks Mail.dat file sets for compliance with Mail.dat and *PostalOne!* standards.

1. Presort a mailing.
2. Generate the Mail.dat files, selecting **09-1** as the *Version* on the *General* page.
3. Using Windows Explorer, browse to the folder housing the TEM Mail.dat Client.
4. Double-click the run-mdclient.bat file.
5. Sign in, using your *PostalOne!* account name and password.
6. Click **Job Validation/Upload**. The *Job Validation/Upload* window opens.
7. Click **Add Jobs**. An *Open* dialog box appears.
8. Select the location of the .hdr or .zip file.
9. Select the .hdr or .zip file. Click **Open**.

The selected file appears in the *Job Validation/Upload* window, as in Figure 5 on page 17.

Table 2: Full Service Request Worksheet from Intelligent Mail & Electronic Documentation Checklist

Exhibit 1: Full-Service Data Set-up Request Worksheets

Full-Service Data Set-up Request Worksheets

In the "List of Mailer IDs" worksheet include your complete list of Mailer IDs and the location to which you would like to associate the Mailer IDs. This is for the purposes of USPS administrative purposes and will not restrict your use of Mailer IDs.

In the "List of CRIDs" worksheet include an entry for each CRID location. Include an entry for each Mailer ID with a different location.

Element	Description
① Mailer ID (MID)	List of Mailer Owner ID
② CRID	Customer Registration ID assigned by USPS system
③ Address (business entity)	Enter the location to which you would like to associate the Mailer ID
④ CRID	Customer Registration ID assigned by USPS system
⑤ CRID Location Address	Enter the location you wish to associate to the CRID
⑥ Mailer ID	Enter Mailer ID associated to the CRID

List of Mailer IDs Worksheet (one MID can only have one CRID)		
① Mailer ID	② CRID	③ (Mailer ID) Address
9XX XXX XX1	XXX XXX XXX XX1	123 Main Street NW, Wash DC 20010
9XX XXX XX2	XXX XXX XXX XX2	234 7th Street, Wash DC 20026
9XX XXX XX3	XXX XXX XXX XX3	345 Georgia Street, Wash DC 20012
9XX XXX XX4	XXX XXX XXX XX4	456 M Street NW, Wash DC 20013
9XX XXX XX5	XXX XXX XXX XX5	678 U Street, Wash DC 20011

List of CRIDs Worksheet (one CRID can have one or more MIDs)		
④ CRID	⑤ CRID Location Address	⑥ Mailer ID
XXX XXX XXX XX1	123 Main Street, Wash DC 20010	9XX XXX XX1
		9XX XXX XX2
		9XX XXX XX3
		9XX XXX XX4
		9XX XXX XX5

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[PostalOne! SITE](#) | [PERSONAL PROFILE](#) | [HELP](#) | [LOGOUT](#)

Home | Job Validation/Upload | Upload Metrics | Settings

Job Validation/Upload

Jobs selected for validation/upload:

[Remove](#) File Name: BCCS006D Job ID: 00000109

[Add More Jobs](#)

Upload Selected Jobs?

Just Validate Job(s)

Upload after validation

Validate

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Figure 5: Selecting Mail.dat files for validation

10. Under *Upload Selected Jobs?* select **Just Validate Job(s)**.
11. Click **Validate**.
12. The *Validation Status* window opens to report the results. If there are no errors, proceed to “Transfer Files” on page 19. Otherwise, continue with “Make Revisions” on page 18.

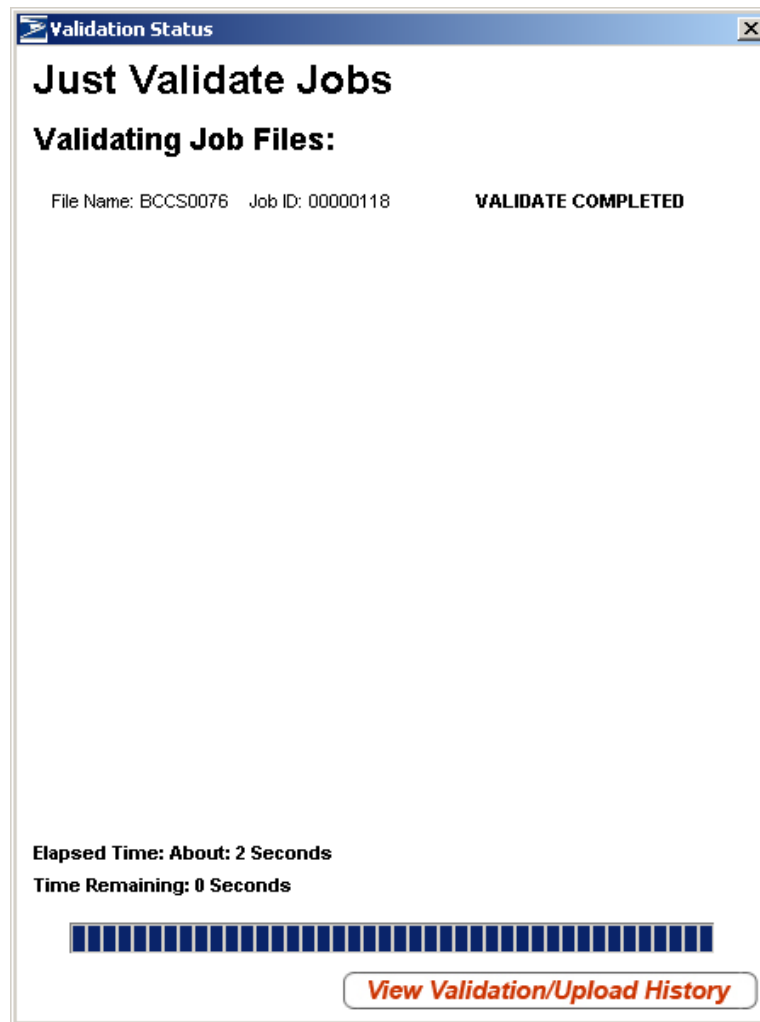


Figure 6: File Validator Result Message

Make Revisions

1. Click **View Validation/Upload History**.
2. To search for your job, see steps 3 through 6 of "Check PostalOne! Job Status" on page 19.
3. Click your **Job ID** to view associated error messages.
4. Review and address the errors. Section 2.4 of the *Postal Service Mail.dat Technical Specification* lists frequent causes of validation failure. Section 3.1.3 discusses the Validation Log file. Appendix E lists error messages.
5. After correcting the errors, generate a new Mail.dat file set. Then do one of the following:
 - If you have logged off and closed the Client, return to step 3 of "Validate Files" on page 15.
 - If you have logged off but the Client is still open, return to step 5 of "Validate Files" on page 15.
 - If you are still signed in, return to step 6 of "Validate Files" on page 15.

Transfer Files

Once validation succeeds, you can transfer files to *PostalOne!*

1. Click the **Close** button of the *Validation Status* window to return to the *Home* page.
2. Click **Job Validation/Upload**:
3. Click **Remove** to the left of any jobs that you no longer wish to transfer.

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Home Job Validation/Upload Upload Metrics Settings

Job Validation/Upload

Jobs selected for validation/upload:

[Remove](#) File Name: BCCS0071 Job ID: 00000113

[Remove](#) File Name: BCCS0072 Job ID: 00000114

[Add More Jobs](#)

Upload Selected Jobs?

Just Validate Job(s)

Upload after validation

Validate and Upload

Files will be uploaded to the Production environment

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Figure 7: Selecting Mail.dat files for transfer

4. Under *Upload Selected Jobs?* select **Upload after Validation**.
5. Click **Validate and Upload**
6. Accept the agreement.
7. If the transfer fails, return to “Make Revisions” on page 18. Otherwise, continue.
8. Click the **Close** button of the *Validation/Upload Status* window to return to the *Home* page.
9. Follow the instructions in “Check PostalOne! Job Status” on page 19 to view the job’s progress.
10. Continue submitting to the TEM until you pass the certification test.

NOTE



Sections 2.2 through 2.4 of the Postal Service Mail.dat Technical Specification contain detailed information about configuring and validating Mail.dat files, including descriptions of errors at the segment and file levels, descriptions of mailing cases that Mail.dat does not support, and a discussion of postage payment. Appendix D describes the criteria used in file validation, field by field.

Check PostalOne! Job Status

The Mail.dat Client offers two levels of reporting: Validation/Upload History and Upload Metrics.

Validation/Upload History supplies details on each job validated or uploaded to a *PostalOne!* account. Upload Metrics provides a more analytical approach, summarizing a period’s activity according to measurements like success ratios and average upload times.

Job Validation/Upload History

Was your job accepted? When? What was the Job ID? You can learn this and other information on the Mail.dat Client by using the Job Validation/Upload History page.

Once logged in to the Client, get job status information as follows:

1. Click **Home**.
2. Select the *Validation/Upload History* tab.
3. Enter the dates between which you validated and/or transferred the files. Dates earlier than 90 days before the current date result in an error message.
4. Enter the *Job ID*, if known.
5. Select the mailing facility *CRID* from which the job originated, if known. Otherwise, leave all mailing facility *CRIDs* checked.
6. Click **Submit**.

Data Fields. The *Validation/Upload History* page includes the following data fields:

- **Job ID:** 8-character field that uniquely identifies each set of transferred files
 - **File ID:** File set .hdr file
 - **Mailing Facility ID:** Verification Facility CRID
 - **Submission Date:** Date of file transfer
 - **# of Files:** Number of files in the file set
 - **File Status:** Mail.dat job status from Setup page of the Mail.dat Wizard
 - **O:** Original
 - **U:** Update
 - **C:** Cancel
 - **Submission Type:** This is the function you selected on the *Validate/Upload* screen.
 - Validation/Upload
 - Validation
 - **Submission Status:** Mail.dat jobs go through a multi-stage process that includes validation at both the client and server before incorporation into the *PostalOne!* database.
 - **Pending:**
 - **Validated:**
 - **Client Validation Failed:**
 - **Server Validation Failed:**
 - **Upload Failed:**
 - **Queued:**
 - **In Progress:**
 - **Complete:**
 - **Postage Statement:** Was a Postage Statement generated? (Were containers defined?)
 - **Yes**
 - **No**
 - **N/A**
 - **Qual Report:** Was a Qualification Report generated?
 - **Yes**
 - **No**
 - **N/A**
7. If the job resulted in the generation of a Qualification Report and/or Postage Statements), use the following procedure to view them:
 - a. Visit the **Business Customer Gateway->Electronic Data Exchange->Dashboard**.
 - b. Display your job on the *Dashboard Management System* page.
 1. Enter an appropriate range for the *Submit Date*.
 2. Unless you know your job status, set *Job Statuses* to **All - Include All Job Statuses**.
 3. Click **Search**. Your job should appear among the group of those displayed.
 - Click the appropriate **Postage Statement ID** to view a Postage Statement.
 - Click the **Job ID** followed by **Qualification Report** to view that document.
 - c. Verify that the forms from *PostalOne!* match those generated by Mail Manager.

Upload Metrics

Use Upload Metrics for a "big picture" view of *PostalOne!* activity. What percentage of jobs were successful? How much data did you transfer? How much time did it take?

The *Upload Metrics* page supports the following reports:

- Original Jobs Summary
- Original Jobs Summary (location)
- System Success Rate
- File Transfer Totals
- Average File Size
- Average Transmission Time
- Postage Summary by Week
- Postage Summary by Mailing Facility

To generate a report:

1. Click **Upload Metrics**.
2. Select a report from the drop-down list.
3. Select a date range. Dates earlier than 90 days before the current date result in an error message.
4. Click **View Report**.
5. Click **Print** to print the report.
6. Click **Export** to save it as a .csv file.

Descriptions of each report's contents appear in the Help system.

The screenshot shows the 'Upload Metrics' page in the PostalOne! system. At the top, there is a navigation bar with links for Home, Job Validation/Upload, Upload Metrics (selected), and Settings. Below the navigation bar, the 'Upload Metrics' section is active, showing a dropdown menu set to 'Original Jobs Summary' and a date range selector for 'From: 04/01/2009' to 'To: 04/30/2009'. A 'View Report >' button is present. Below this, the 'Original Jobs Summary' report is displayed as a table with the following data:

Job ID	Jobs	Successful	Failed	Validation Errors	Post-Upload Errors	Total Jobs
00015370	7	1	6	6	6	7
00315377	5	1	4	4	4	6
09015244	5	1	4	4	4	6
00015406	4	0	4	4	4	4
00000114	3	0	3	3	3	3
00002108	3	1	2	2	2	3
00015293	3	1	2	2	2	3
00015294	3	0	3	3	3	3
00015312	3	0	3	3	3	3
00015382	3	1	2	2	2	4
00015399	3	0	3	3	3	3
00015404	3	0	3	3	3	4
00015433	3	1	2	2	2	3
00015441	3	0	3	3	3	3
00215313	3	1	2	2	2	3
09015248	3	1	2	2	2	4
00000109	2	1	1	1	1	2
00000112	2	1	1	1	1	2
00000113	2	0	2	2	2	2
00002107	2	0	2	2	2	2
00002196	2	0	2	2	2	2

At the bottom of the page, there is a footer with the following text: '1.0.60-05012009-CAT Copyright ©2009 USPS. All Rights Reserved. No FEAR Act EEO Data FOIA Inspector General Promoting Integrity Postal Inspectors Preserving the Trust'.

Figure 8: Upload Metrics page, Original Jobs Summary report

Go Live with PostalOne!

Progressing from the "sandbox" stage to paperless document submission involves the following steps. Those reading electronic versions of this document can go directly to a step by clicking its heading in the following list.

1. Pass the Certification Test on the PostalOne! TEM
2. Pass the PostalOne! Parallel Processing Evaluation
3. Go Paperless with PostalOne!

Pass the Certification Test on the PostalOne! TEM

This section describes how to obtain certification at the TEM. It is the first evaluation process that *PostalOne!* account holders must undergo on the way to going paperless.

The section begins by describing testing objectives at a high level, then discusses the approaches to testing that BCC Software provides. The final portion outlines the testing procedure itself.

Testing Objectives. Testing consists of demonstrating your ability to generate and transfer Mail.dat file sets that address requirements (produce document sets) the USPS defines in Section 4 of the *Electronic Documentation and Intelligent Mail; Ready, Set, Go!* guide. Those interested in qualifying for Intelligent Mail Full Service should also review the *Intelligent Mail Full-Service Checklist*.

The USPS categorizes requirements by mailing class, service level, and required or optional status. For example, the Full Service Standard Mail section includes the following requirements:

- Qualification Report, **one** postage statement, Register, Version Summary Report, Reconciliation Report (See Table 3, column 3.)
- Qualification Report, **multiple** (at least two) postage statements, Register, Version Summary Report, Reconciliation Report (See Table 3, column 4.)
- Cancel statement using a Mail.dat file transfer OR the PostalOne! interface. (See step 9 on page 27.)
- Change piece weight, and resend postage statement. (See Table 3, columns 5 and 6.)
- Qualification Report, **one** postage statement, Register, Version Summary Report, Reconciliation Report, piece level information, nesting information, By/For information, Mail Owner/Preparer identified (See Table 3, column 7.)

Transferring Mail.dat file sets requires following the procedures described in "Transfer Files to the PostalOne! Test Environment for Mailers" on page 14.

How BCC Software Can Help. BCC Software has enhanced the Mail.dat Wizard to update and delete Mail.dat file sets. Table 3 on page 23 shows a way of using this new functionality to meet USPS testing requirements. It assumes that you have presorted a set of Standard Mail letters weighing 3.3 oz. each and eligible for automation discounts. Since the examples use Mail.dat version 09-1, the table includes data relevant to Intelligent Mail Full Service and the Intelligent Mail Barcode.

The first two columns represent the pages and fields of the Mail.dat Wizard. The remaining columns represent the requirements as listed in "Testing Objectives" and Wizard settings that address them.

Use the table as follows:

1. Presort a set of Standard Mail letters that weigh 3.3 oz. each, are eligible for automation discounts, and drop shipping to various BMCs or SCFs. (Check **Use PVDS**.)
2. Run the Mail.dat Wizard using the values in Column Three as a guide:
 - Fields not displayed in the table are not required for TEM testing or Intelligent Mail Full Service.
 - Some fields, such as *Job ID* and *Package Quantity Table*, will have been completed for you.
 - Use the values displayed in the table for items in **bold** and checkboxes.
 - Use either the values displayed in the table or your own for items displayed in *italics*.
 - Use your own values for items displayed in plain text, such as your Mail Owner permit number.
 - Transfer the file set to *PostalOne!* after completing the Wizard.
3. To complete the requirements in Columns Four through Seven:
 - a. Columns Four, Five and Seven use separate presorts. Column Six updates the presort from Column Five.
 - b. Do the columns in order, left to right.

- c. "GROUP I" and "GROUP II" represent sets of containers you select in the Containers page of the Wizard to update payment status and/or shipment dates.
- d. Check each setting each time and keep track of your changes. The settings file does not retain every Wizard field. If a value, such as permit information, is not in the presort, or if you change a presort setting, you might have to enter the change in each Wizard session to which the change applies.
- e. The *Save Settings File Name* row represents the .mds settings file to which you save your Wizard entries after clicking **Finish** to end a session. Use the .mds file to preserve Wizard settings for both future Wizard sessions and for TaskMaster jobs.
The *ZIP File Name* row represents the compressed (.zip) Mail.dat file set that the Wizard generates. Use the .zip file name to identify your file set during file validation and transfer.
- f. Transfer each resulting file set to *PostalOne!*

Table 3: Sample Mail.dat Wizard settings

Wizard Page	Field	Qualification report 1 postage statement	Qualification report Multiple (at least 2) postage statements	Change piece weight (Original)	Change piece weight (Update)	Intelligent Mail Full Service with Mail Owner/ Preparer IDs, nesting, By/For
Setup	<ul style="list-style-type: none"> • Load saved Mail.dat settings • Settings • Save Mail.dat settings • File set status • Generate Mail.dat file set. / Add additional presorts to existing Mail.dat file set. (radio buttons) 	<input type="checkbox"/> Original Mail.dat job Generate Mail.dat file set.	<input checked="" type="checkbox"/> Original Mail.dat job Generate Mail.dat file set.	<input checked="" type="checkbox"/> Original Mail.dat job Generate Mail.dat file set.	<input checked="" type="checkbox"/> Update Mail.dat job Generate Mail.dat file set.	<input checked="" type="checkbox"/> Original Mail.dat job Generate Mail.dat file set.
General	<ul style="list-style-type: none"> • User License Code • File Set ID (generated) • Job ID (generated) • Version • User's Email Address • Preparer • Location • User's Job Number • Name/Title & Issue • Contact Name • Contact Phone Number • Segmenting Criteria • PostalOne! Preparation 	JQZX 0011 00000017 09-1 jqm@xz.com JQ Mailer C:\BCC\MM \Maildat 9999 <i>TEM_Test1</i> JQ Mailer 555-555-5555 US <input checked="" type="checkbox"/>	JQZX 0012 00000018 09-1 jqm@xz.com JQ Mailer C:\BCC\MM \Maildat 9999 <i>TEM_Test2</i> JQ Mailer 555-555-5555 US <input checked="" type="checkbox"/>	JQZX 0013 00000019 09-1 jqm@xz.com JQ Mailer C:\BCC\MM \Maildat 9999 <i>TEM_Test4</i> JQ Mailer 555-555-5555 US <input checked="" type="checkbox"/>	JQZX 0014 00000019 09-1 jqm@xz.com JQ Mailer C:\BCC\MM \Maildat 9999 <i>TEM_Test4</i> JQ Mailer 555-555-5555 US <input checked="" type="checkbox"/>	JQZX 0015 00000020 09-1 jqm@xz.com JQ Mailer C:\BCC\MM \Maildat 9999 <i>TEM_Test3</i> JQ Mailer 555-555-5555 US <input checked="" type="checkbox"/>

Table 3: Sample Mail.dat Wizard settings (continued)

Wizard Page	Field	Qualification report 1 postage statement	Qualification report Multiple (at least 2) postage statements	Change piece weight (Original)	Change piece weight (Update)	Intelligent Mail Full Service with Mail Owner/ Preparer IDs, nesting, By/For
Database	<ul style="list-style-type: none"> Package Quantity Table (generated for non-manifest mailings) Intelligent Mail Range Table (.IMR) OR Piece Detail Table (.PDR— for mailpieces with unique non-sequential Intelligent Mail barcodes) Save Mail.dat database in unique folder Zip Mail.dat database 	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> (IMR)
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Segment	<ul style="list-style-type: none"> Description Verification Facility Name Verification Facility ZIP+4 Facility ID (CRID) Move Update Method /Date ZIP+4 Encoding/Walk Sequencing Dates Full Service Participation CSA ID General Container Information Detailed Container Information 	<i>US Mail</i> Rochester 14623-3494 1234567 NCOALink 04/30/2009 Cannot update Full Service	<i>US Mail</i> Rochester 14623-3494 1234567 NCOALink 04/30/2009 Cannot update Full Service	<i>US Mail</i> Rochester 14623-3494 1234567 NCOALink 04/30/2009 Cannot update Full Service	<i>US Mail</i> Rochester 14623-3494 1234567 NCOALink 04/30/2009 Cannot update Full Service	<i>US Mail</i> Rochester 14623-3494 1234567 NCOALink 04/30/2009 Cannot update Full Service 123456789
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mail piece	<ul style="list-style-type: none"> Name Entry Country Type Weight (oz.) – taken from presort and modifiable in file sets marked Update. Status Source 	<i>Widgets</i> USA <i>Regular</i> 3.300 Final Agent	<i>Widgets</i> USA <i>Regular</i> 3.300 Final Agent	<i>Widgets</i> USA <i>Regular</i> 3.300 Pending Agent	<i>Widgets</i> USA <i>Regular</i> 1.000 Final Agent	<i>Widgets</i> USA <i>Regular</i> 3.300 Final Agent
Container information	<ul style="list-style-type: none"> Container Status Postage Statement Date Shipment Date: <ul style="list-style-type: none"> Scheduled Actual 	Ready to Pay 07/01/2009 07/01/2009 07/01/2009	Ready to Pay 07/01/2009 07/01/2009 07/01/2009	Preliminary 07/01/2009 07/01/2009 07/01/2009	Ready to Pay 07/02/2009 07/02/2009 07/02/2009	Ready to Pay 07/01/2009 07/01/2009 07/01/2009

Table 3: Sample Mail.dat Wizard settings (continued)

Wizard Page	Field	Qualification report 1 postage statement	Qualification report Multiple (at least 2) postage statements	Change piece weight (Original)	Change piece weight (Update)	Intelligent Mail Full Service with Mail Owner/ Preparer IDs, nesting, By/For
Containers	GROUP I: <ul style="list-style-type: none"> Container Status Shipment Date: <ul style="list-style-type: none"> Scheduled Actual 	Ready to Pay 07/01/2009 07/01/2009	Ready to Pay 07/01/2009 07/01/2009	Preliminary 07/01/2009 07/01/2009	Ready to Pay 07/01/2009 07/01/2009	Ready to Pay 07/01/2009 07/01/2009
	GROUP II: <ul style="list-style-type: none"> Container Status Shipment Date: <ul style="list-style-type: none"> Scheduled Actual 	Ready to Pay 07/01/2009 07/01/2009	Ready to Pay 07/02/2009 07/02/2009	Preliminary 07/01/2009 07/01/2009	Ready to Pay 07/01/2009 07/01/2009	Ready to Pay 07/01/2009 07/01/2009
Tags	<ul style="list-style-type: none"> Include Container Tag Information Mailer/Mailer Location Information Line Intelligent Mail Tray/Container Label Mailer ID 	<input checked="" type="checkbox"/> BCC Software / Rochester NY <input type="checkbox"/> <input checked="" type="checkbox"/> 000849	<input checked="" type="checkbox"/> BCC Software / Rochester NY <input type="checkbox"/> <input checked="" type="checkbox"/> 000849	<input checked="" type="checkbox"/> BCC Software / Rochester NY <input type="checkbox"/> <input checked="" type="checkbox"/> 000849	<input checked="" type="checkbox"/> BCC Software / Rochester NY <input type="checkbox"/> <input checked="" type="checkbox"/> 000849	<input checked="" type="checkbox"/> BCC Software / Rochester NY <input type="checkbox"/> <input checked="" type="checkbox"/> 000849
Postage—Principal component (To add or edit Permit Holder, Mail Owner, or Mailing Facility data, browse to the <i>Select a Permit</i> window. Click New to add a set of permits or click a permit number followed by Modify to change an existing set.)	<ul style="list-style-type: none"> Permit Number (Browse to the <i>Select a Permit</i> window and choose a Mail Owner permit.) Identifications: <ul style="list-style-type: none"> Mailing Facility DUNS Mailing Facility Mailer ID Mailing Facility CRID Permit Holder DUNS Permit Holder Mailer ID Permit Holder CRID Mail Owner DUNS Mail Owner Mailer ID Mail Owner CRID Postage Payment Option Postage Payment Method 	1234 014579125 000849 430855 PVDS Permit	1234 014579125 000849 430855 PVDS Permit	1234 014579125 000849 430855 PVDS Permit	1234 014579125 000849 430855 PVDS Permit	1234 014579125 000849 430855 3029384726 000328 264177 3842980281 000728 8293287 PVDS Permit

Table 3: Sample Mail.dat Wizard settings (continued)

Wizard Page	Field	Qualification report 1 postage statement	Qualification report Multiple (at least 2) postage statements	Change piece weight (Original)	Change piece weight (Update)	Intelligent Mail Full Service with Mail Owner/Preparer IDs, nesting, By/For
Options	<ul style="list-style-type: none"> Reset Package ID in each container Use sequential Piece ID Include mail piece status Include ACS keyline data 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
IMB	<ul style="list-style-type: none"> Service Type ID Mailer ID Serial Number 	Full Service 000849	Full Service 000849	Full Service 000849	Full Service 000849	Full Service 000849
	Saved Settings File Name	FS_1PS.mds	FS_2PS.mds	FS_WT1.mds	FS_WT2.mds	FS_BY4.mds
	ZIP File Name	JQZX0011.zip	JQZX0012.zip	JQZX0013.zip	JQZX0014.zip	JQZX0015.zip

Procedure. The TEM testing process follows this general procedure.

Follow these steps to inform the Help Desk of your readiness to test:

1. Log in to the Business Customer Gateway.
2. Click **Electronic Data Exchange**.
3. Download and install the TEM Client for your operating system. (The USPS updates the Client regularly, and recommends frequent updates to maintain compatibility with the system.)
4. Click the **Start Testing - Notify Help Desk** link that corresponds to your operating system and Mail.dat version. (See Figure 4 on page 14.) An e-mail window opens.
5. Include the following information in the e-mail:
 - Subject Line: *Level of Service* ("Full Service" or "eDoc") "Test Scenario Worksheet" and *Class of Mail* (Example: "Full Service Test Scenario Worksheet First Class Mail")
 - Body:
 - Company name
 - Address
 - City
 - State
 - ZIP Code
 - CRID
 - Contact name
 - Contact phone number
 - Name of Post Office
 - File transfer method followed by service level. (Example: Mail.dat 09-1F for Full Service; Mail.dat 09-1E or Mail.dat 08-2E for use with Intelligent Mail Basic or POSTNET.)
 - Attachment: Test Scenario worksheet

To have a job or jobs evaluated:

1. Presort a mailing.
2. Generate Mail.dat files, noting the .hdr file name and Job ID.
3. Validate the file set.
4. Transfer the file set.
5. Repeat steps 1 through 4 as necessary to address each requirement. Note the Job ID of each transferred file set.

6. Use the *Metrics Search* page to learn the outcome of each transfer. See “Check PostalOne! Job Status” on page 19 for more information.
7. Inform the Help Desk (usually by email) that you have transferred files for evaluation. Stipulate the Job IDs transferred and the requirement, or portion of the requirement, that each Job ID addresses.
8. The Help Desk will report the outcome to you via email, as well as inform you of any additional requirements.
9. If the Help Desk asks you to delete a postage statement or job, you have the following options:
 - **Use the PostalOne! interface to cancel postage statements.**
 - To cancel a postage statement:
 1. Log in to the Business Customer Gateway.
 2. Click **Electronic Data Exchange**.
 3. Click **Dashboard**.
 4. Submit a query that includes the job number containing the postage statement.
 5. To view all postage statements, click the + sign that heads the first column.
 6. Click the link to the postage statement.
 7. Click **Cancel**.
 8. Review the statement, scrolling as necessary, until you see the **Back** and **Cancel** buttons.
 9. Click the **Cancel** button at the bottom right of the screen, followed by **OK**, to confirm.
 10. *PostalOne!* displays a *Cancellation Response* page as acknowledgement.
 - **Use the Mail.dat Wizard:**
 - To cancel a postage statement:
 1. Run the presort that contains the corresponding job.
 2. Start the Wizard.
 3. Set *File set status* to **Update Mail.dat job**.
 4. Go to the *Containers* page.
 5. Right-click a group of containers for which you had previously generated a statement.
 6. Click **Modify**.
 7. Set *Status* to **Cancel**.
 8. Complete the Wizard.
 9. Transfer the file set to *PostalOne!*
 - To cancel a job:
 1. Run the presort that contains the job.
 2. Start the Wizard.
 3. Set *File set status* to **Delete Mail.dat job**.
 4. Complete the Wizard.
 5. Transfer the file set to *PostalOne!*.
 6. If the transfer is successful, the job no longer appears on the *Dashboard Management System* page or Mail.dat Client. If *Metrics Search* indicates a failure, click **Validation/Upload History** in the Mail.Dat Client and note the error message. Follow the instructions in the error message, then re-transfer the job cancellation.

Once you have fulfilled all of the TEM requirements, the next step depends on where your mail is weight verified. Mailers who verify mail weight at the BMEU usually can move into production once the BMEU issues approval. Mailers with other weight verification locations, such as a Detached Mail Unit (DMU) must complete a parallel processing requirement. Business Mail Support (BMS) oversees this phase.

NOTE

Download, install, and use the production (PROD) version of the Mail.dat Client at this point. Obtain it from the Production (PROD) section of the Electronic Data Exchange page. Use the same Business Customer Gateway URL, User Name, and password that you used to access the TEM.

Pass the PostalOne! Parallel Processing Evaluation

The parallel processing evaluation consists of a period, typically five business days, during which you submit postal data in both paper and electronic form. (You transfer production data to the *PostalOne!* system.) Clerks must keep one copy of each form at the review location, whether it be the BMEU or a DMU. At period's end, BMS compares your electronic data with the paper versions and issues its findings. You are either approved to go live or must continue with parallel processing for another review.

The *Electronic Documentation and Intelligent Mail; Ready Set Go!* guide and the *Intelligent Mail Full-Service Checklist* include information on parallel processing in their discussions of the testing process.

Go Paperless with PostalOne!

Once your BMEU or BMS is satisfied with your electronic documentation capabilities, you are certified for paperless transmission of postal documents through *PostalOne!* The notification is typically by email; there is no standard PS Form or certificate. Support duties revert to the *PostalOne!* Help Desk.

Conclusion

By now you should have a roadmap for achieving certification to submit Mail.dat files to the USPS through *PostalOne!* and an awareness of the tools that BCC Software, IDEAlliance, and the USPS offer to assist you.

This is one of an ongoing series of documents that address issues related to *PostalOne!* Consult the Support page of the BCC User Portal for other materials. Additional assistance is available through *PostalOne!* Customer Care (1-800-522-9085) or through BCC Technical Support.

References

The following references provide information about *PostalOne!*, Mail.dat, and the Mail.dat Client. Should links to specific documents change, use the following links to find them:

- http://www.idealliance.org/industry_resources/production_and_supply_chain/mail.dat
- <https://ribbs.usps.gov/index.cfm?page=intellmailguides>
- <https://ribbs.usps.gov/index.cfm?page=intellmailgateway>

Document names, versions, and publication dates at the time of this document's preparation appear below. These may have changed since publication.

- *Electronic Documentation and Intelligent Mail; Ready, Set, Go!*, version 1.8, April, 2009
- *Intelligent Mail Full-Service & Electronic Documentation Checklist*, June 2009
- Mail.dat specification, version 09-1, March, 2009
- *Postal Service Mail.dat Technical Specification*, version 6.2, June 2009
- *User Access to Electronic Mailing Information and Reports Guide*, version 4.1, June 2009

Questions or comments about this technical document? Suggestions for future documents? Send them to techdocs@bccsoftware.com. We look forward to hearing from you!

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