

# Seamless Acceptance Update IV Mail Quality Data Reports



### **Seamless Acceptance Benefits**

- Verifications are performed electronically, simplifying mail acceptance
- Auto-finalization puts control of postage payment into the mailer's hands
- Longer mail production cycles
- Control over mail submissions times without USPS intervention
- Allows for improved feedback & identification of trends
- Standardized acceptance & verification process
- Trend-based verifications measuring quality across a calendar month
- Seamless Incentive -\$0.001 for eligible Full-Service pieces
  - (min. 1,000 pieces per mailing)



### **Updates to USPS Seamless Policy**

- USPS Pub 685 Update in process Release Date?
  - Guide to Streamlined Mail Acceptance for Letters and Flats

- USPS Seamless Acceptance Information
  - https://postalpro.usps.com/mailing/seamless-acceptance
  - https://postalpro.usps.com/seamlessacceptactfactsheet



### **Seamless Acceptance Entry Dates**

### DMU – Detached Mail Units - May 1, 2021

- Applies to DMU mailers that present Full-Service Eligible Mail
- The USPS is not looking to close DMUs but to require adoption of Seamless
- DMU mailers unable to comply with Seamless Acceptance requirements by May 1, 2021 must request an extension
- Send extension requests to: <u>HQMailEntry@usps.com</u>
- Certificates of Mailings and non-acceptance duties will be completed when the clerk is on site for Seamless samplings

### BMEU – Business Mail Entry – July 1, 2021

- Key Points for Full-Service mailings presented at a BMEU:
  - Seamless Acceptance verification sampling and methods
  - Auto-Finalization on mailing date / Automated census and sampling verifications
  - Same Assessment Metrics & Thresholds as Seamless
    - Assessments based on data from census and samplings
    - No impact to mailers that do not present Full-Service mailings



## **Mail Entry Acceptance Overview**

Verification Type	Non- Full-Service Mailings	Full-Service Mailings (Automated Verification)	Seamless Acceptance
Traditional Verifications	Performed	<u>NOT</u> performed	<u>NOT</u> performed
Automated Verifications	<u>NOT</u> Performed	Performed	Performed
Monthly Postage Assessments	Automated Verifications do NOT result in additional Postage	Automated Verifications may result in additional postage (seamless metrics)	Seamless Acceptance verifications may result in additional postage (seamless metrics)
Auto-Finalization	Does <u>NOT</u> occur	Occurs	Occurs



### **Seamless On-Boarding Update**

- Onboarding is handled by local level/district level mail entry staff.
  - Additional Assistance from USPS Mailer Support available as needed
- On-Boarding Checklist is Available in Pub 685
- <u>E-Induction</u> not required for BMEU entered mailers
  - Enrollment in e-Induction may allow you to drop mail off outside BMEU hours
- Mailers On-boarding to Seamless may be asked by the USPS to discuss their processes for managing Seamless Acceptance and Assessments prior to activation
  - Seamless Verification and Assessment processes will be used for all Full-Service Mail.
  - You need to be prepared for the new verification and assessment process



## **Seamless On-Boarding Update**

### Seamless Acceptance - Process & Assessment Self-Examination

- Who is managing your internal seamless data monitoring and analysis?
- How often are you monitoring your Mailer Scorecard Data?
- What are you doing when you find errors even errors under ?
- If you need help beyond your staff Where would you go for assistance?
- Do you know who to contact at the USPS for help?
- Do you know what tools NAPM vendors have to help manage Seamless data?
- Do you understand the Assessment Review and Appeals process?
- Can you produce documents to assist is the Error review process?
- Can you produce a "Known Undocumented Log"
- Are your enrolled in IV Mail Quality Data Reports?
- Can you create a IV Data Feed and Analyze reports?
- Are you storing Mail.dat / IMb data / print files/ data files and IV Data?
- How long are you storing your data?



## Active Seamless Members Process Review

- Did you enter Seamless Acceptance early because you were under the Seamless Thresholds with few Mailer Scorecard issues?
  - Time to get to work!
- Review the On-Boarding Notes on previous slides
- Start Analyzing ALL Mailer Scorecard errors even if below threshold
  - You will need experience analyzing mail quality data for when you are faced with a Mail Quality issue and potential assessment. Not IF....WHEN!
  - Create a Known Undocumented Log and Process PRACTICE
- Sign-up for IV Mail Quality Data reports NOW!
  - SASP Mail Quality "On-Demand" Mail Quality Reports are no longer available



### **Seamless Incentive Notes**

#### Available to all eDoc submitters with a(n):

- Seamless Acceptance CRID
- Permit linked to an Enterprise Payment account (ACH Debit or Trust)
- Enrollment in Seamless Incentive in PostalOne!

The incentive is deposited to Enterprise Payment account that corresponds with the permit enrolled for incentive, and linked to the eDoc submitter CRID

- Trust accounts credited upon postage statement finalization
- · ACH debit accounts as a daily aggregate

#### How to identify eDoc Sender CRID in eDoc

- Mail.dat: Segment Record's (.seg) "eDoc Sender CRID"
- Mail.XML: OpenMailingGroupRequest > MailingGroupData > MailingFacility
- Postal Wizard: the mailing agent
- https://postalpro.usps.com/seamless-incentive
- Note: To sign-up for the Seamless Incentive you must have BSA Rights in the Business Customer Gateway for "manage mailing activity" and "EPS"



### **NAPM Seamless Resources**

#### CONTACT - NAPM Vendor Members

 Our vendors members have tools to help you manage the Seamless Process and Data Analysis.

### NAPM Online Education Center

- Seamless Acceptance Webpage
  - https://napm.memberclicks.net/seamless-acceptance

#### Seamless Resources – Available to Members and Non-Members

- NAPM July 8, 2020 Open Webinar: The Road to Seamless
- NAPM Mail Owner Scorecard Sample
- NAPM Training Video: Mail Owner Scorecard Analysis
- USPS List of Undocumented Descriptions (1/28/20)
- USPS Seamless Presentation, National Postal Forum 2019



### **NAPM Seamless Resources**

- Additional Resources (NAPM members only -- login required)
  - Click on the NAPM Education Center
    - NAPM Training Video on Undocumented Pieces
    - NAPM Training Video on Known Undocumented Log (KUL)
    - NAPM Seamless Presentation at NAPM Annual Conference Feb 2020
    - NAPM Webinar: Streamlined Mail -- Full-Service, Move Update and elnduction
    - NAPM Webinar: Seamless Acceptance Part 1 / Part 2
    - NAPM Undocumented Best Practices
    - NAPM Sample Known Undocumented Log
    - NAPM Streamlined Acceptance Committee information

#### Mailer Scorecard Analysis – NAPM Members and Non-Members

- Level 1 Review = Overview of Mailer Scorecard & Mail Owner Scorecard
  - Free to NAPM Members / Includes 1 hour conference call to review results
  - https://napm.memberclicks.net/new-services
- Level 2 Scorecard Analysis Services Available at additional cost



## Informed Visibility – Mail Tracking and Quality Reporting

### Information Available in the IV Platform

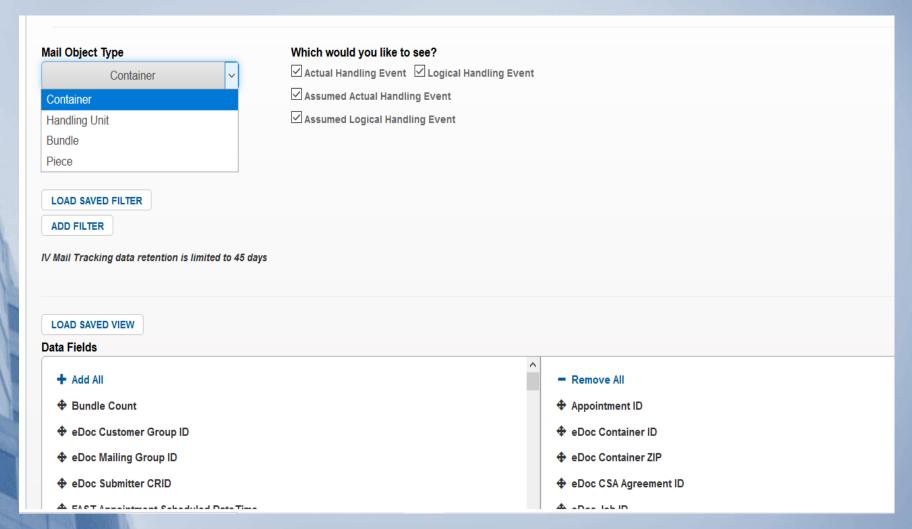
- Mail Tracking Data letter/flat containers, handling units, bundles, and pieces
- Enterprise Payment System (EPS)
- Package Platform Data
- Informed Delivery Post Campaign
- Mail Quality Data (MQD)

### Report Data is available in a delimited file format:

- These text files are formatted based on the data fields you select.
- Mailers specify the frequency and start time for files to be generated.
- Files can be sent to your server through Secure FTP\* (SFTP) or set up to download from the IV-MTR application.



## **IV Reports – Mail Tracking**



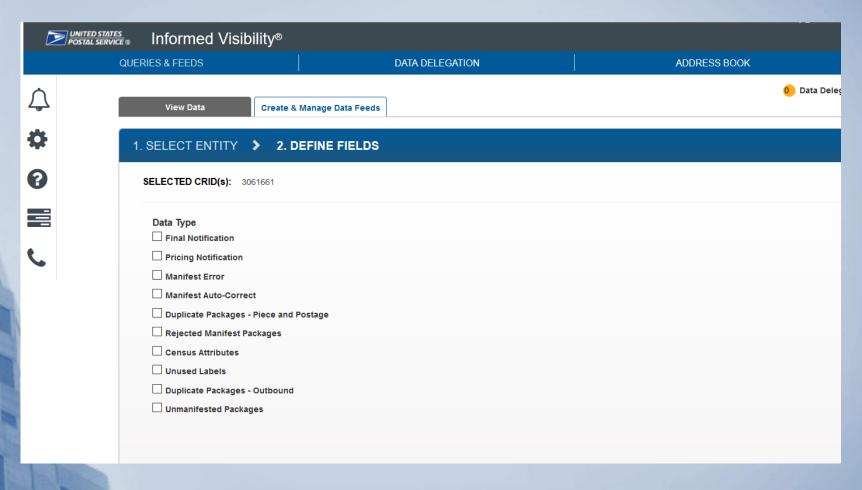


## IV Reports – EPS

D	UNITED STATES POSTAL SERVICE	Informed Visil	bility®	
	Q	UERIES & FEEDS		DATA DELEGATION
$\bigcirc$		View Data	Create & Manag	e Data Feeds
*		1. SELECT ENTITY	> 2. DEFIN	E FIELDS
8		SELECTED CRID(s): 3	3443602	
		Data Type  Transactions  Bank Account Without Postage Statement icaps Invoices  Commercial Postal S	Details	Address Quality Commercial Mailings Commercial Postal Store Transaction Details
		Details ☐ Credit Card Paymen	nts	-



## IV Reports – Package Platform

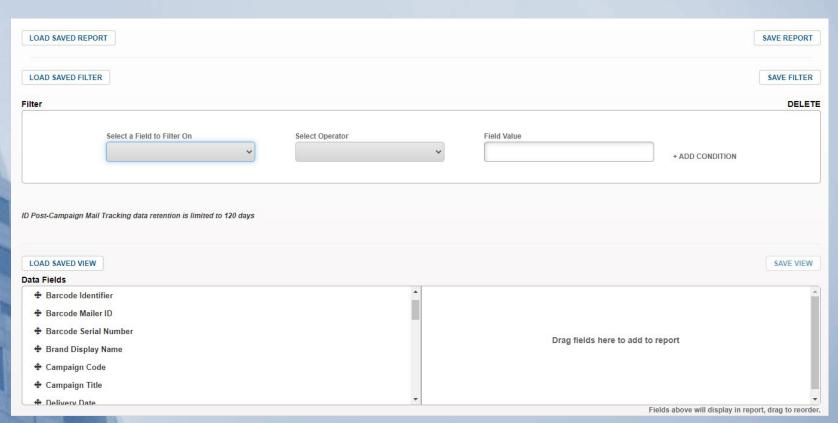




### **IV Reports - Informed Delivery**

### **Available Data: Informed Delivery Post Campaign Data**

#### **Informed Delivery Post Campaign Data: ID**





## **IV Reports – Mail Quality**

Informed Visibility®	
View Data Create & Manage Data Feeds	•
1. SELECT ENTITY > 2. DEFINE FIELDS	
SELECTED CRID(s): 4481855 SELECTED Mailer Role(s): eDoc Submitter, Mail Preparer, Mail Owner, Transportation Carrier	
Program Which Error Type would you like to see?	
☑ Full-Service ☐ MID ☐ STID ☐ Barcode Uniqueness ☐ By/For ☐ Unlinked Copal ☐ Entry Facility ☐ Warning	
☑ eInduction ☐ Undocumented ☐ Payment ☐ Entry Point Discount ☐ Zone ☐ Misshipped ☐ Duplicate ☐ Warning	
☑ Seamless Acceptance ☐ Undocumented ☐ Delivery Point ☐ Nesting/Sortation ☐ Postage ☐ Weight ☐ Mail Characteristic ☐ Warning	
☑ Move Update ☐ Warning	
IV Mail Tracking data retention is limited to 45 days	
PREVIOUS STEP	CREATE FEED



## **Access to IV Reporting**

#### Access the IV Application

- Option 1: Directly
  - 1. Go to https://iv.usps.com
  - 2. Click Log In and enter your credentials



Every Door Direct Mail more into >

Incentive Programs more info >

Intelligent Mail Small Business (IMsb) Lool more info ≥

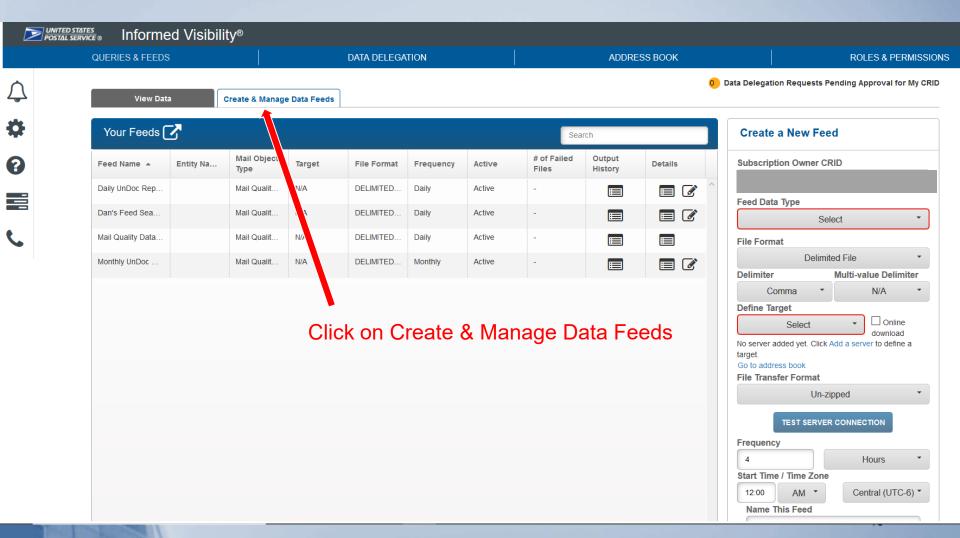
♣ Informed Visibility more info >

- Option 2: Through the BCG
  - 1. Log into https://gateway.usps.com
  - 2. Go to Mailing Services > Informed Visibility
  - Click Go to Service

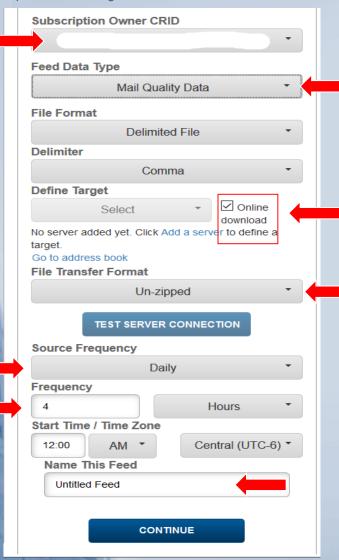


access



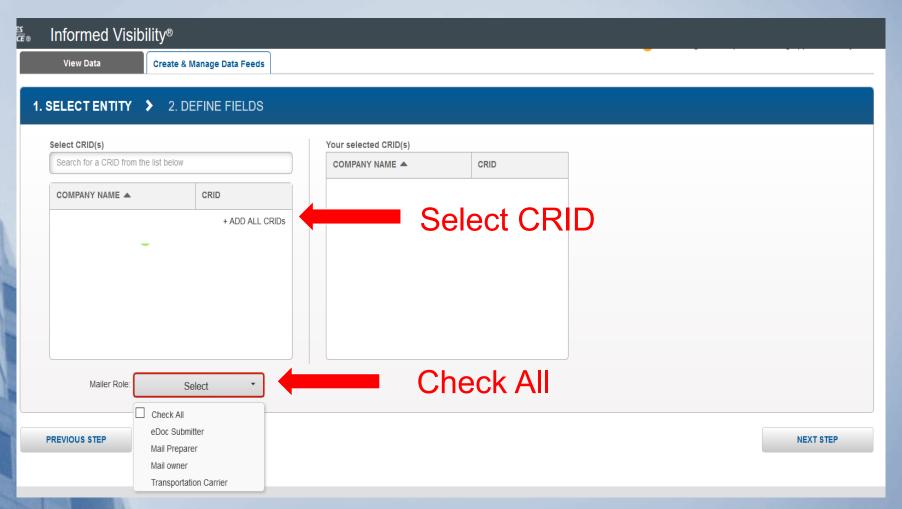






- Choose your CRID
- Select Data Feed Type
- Define Target
  - On-Line Download is easy
- File Transfer Format
  - Leave at Default unzipped
- Define Source Frequency
  - Daily, Weekly, and Monthly
  - Set-up Daily and Monthly Feeds
  - Frequency = 1 Day
- Name Your Feed







	Hello, andy@scorecard-help.com Gatewa	ay USPS.com
Informed Visibility	${\sf y}^{\sf e}$	
View Data Cr	reate & Manage Data Feeds	
1. SELECT ENTITY >	2. DEFINE FIELDS	
SELECTED CRID(s): 306166 SELECTED Mailer Role(s): 6	61 eDoc Submitter, Mail Preparer, Mail Owner, Transportation Carrier	
Program  ✓ Full-Service	Which Error Type would you like to see? ☐ MID ☐ STID ☐ Barcode Uniqueness ☐ By/For ☐ Unlinked Copal ☐ Entry Facility ☐ Warning	
☑ eInduction	☐ Undocumented ☐ Payment ☐ Entry Point Discount ☐ Zone ☐ Misshipped ☐ Duplicate ☐ Warning	
Seamless Acceptance	☐ Undocumented ☐ Delivery Point ☐ Nesting/Sortation ☐ Postage ☐ Weight ☐ Mail Characteristic ☐ Warning	
☑ Move Update	☐ Move Update ☐ Warning	
Choose	Report Type	
IV Mail Tracking data retention is li	imited to 45 days	
PREVIOUS STEP		CREATE FEED



## IV Mail Quality - File Naming Info

#### File Naming Convention: Mail Data Quality

File Naming Convention YYYYMMDDHHMMSS\_MQD\_<Program
Type>\_<Error Type>\_<Source Frequency>\_<4
random alphanumeric chars for Message Group>\_<4
digits for Message #>.txt

Source Frequency	Short
Daily	D
Weekly	W
Monthly	M

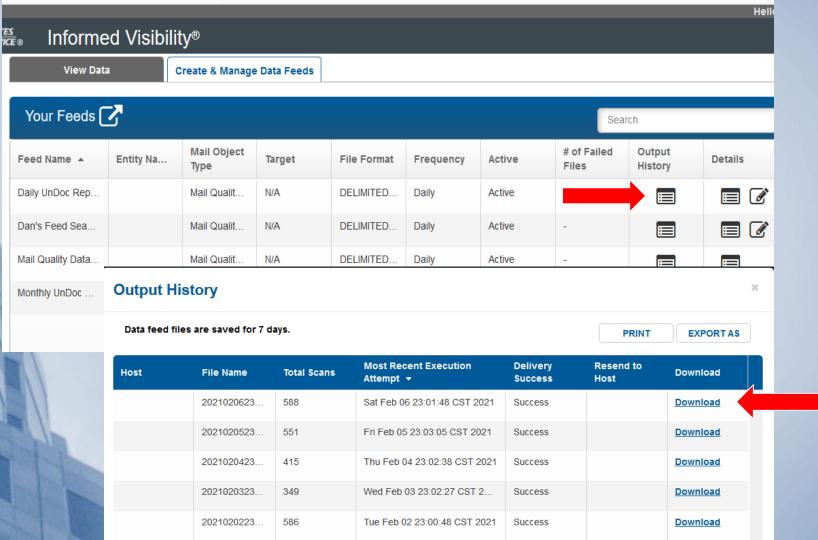
Program Type	Short
Full Service	FS
Move Update	MU
Seamless	
Acceptance	SE
eInduction	El

- MQD File Name Examples:
- Read two files Full Service Barcode Uniqueness Daily:
- 20171019045510\_MQD\_FS\_BQ\_D\_0F2D\_0001.json
- 20171019045510\_MQD\_FS\_BQ\_D\_0F2D\_0002.json
- Read 1 file for Seamless Acceptance Nesting Sortation – Weekly:
- 20171020223045\_MQD\_SA\_NS\_W\_0F2D\_0001.txt

Error Type	Short
Barcode	
Uniqueness	BQ
By/For	BF
Delivery Point	DP
Duplicate	D
Entry Facility	EF
Entry Point	
Discount	EPD
Mail Characteristic	MC
MID	MID
Misshipped	M
Move Update	MU
Nesting/Sortation	NS
Payment	PYMT
Postage	P
STID	STID
Undocumented	U
Unlinked Copal	UC
Warning	W
Weight	WT
Zone	Z

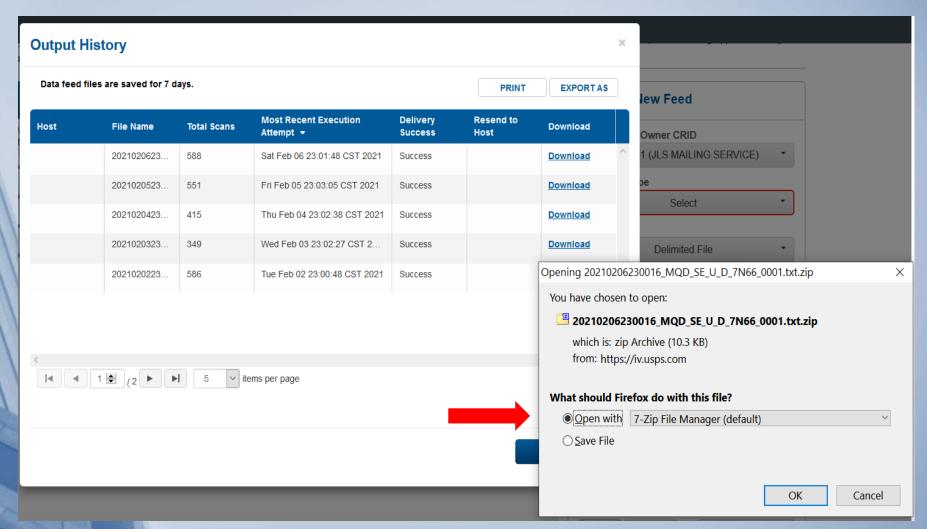


## Simple Data Retrieval IV – Mail Quality Feeds



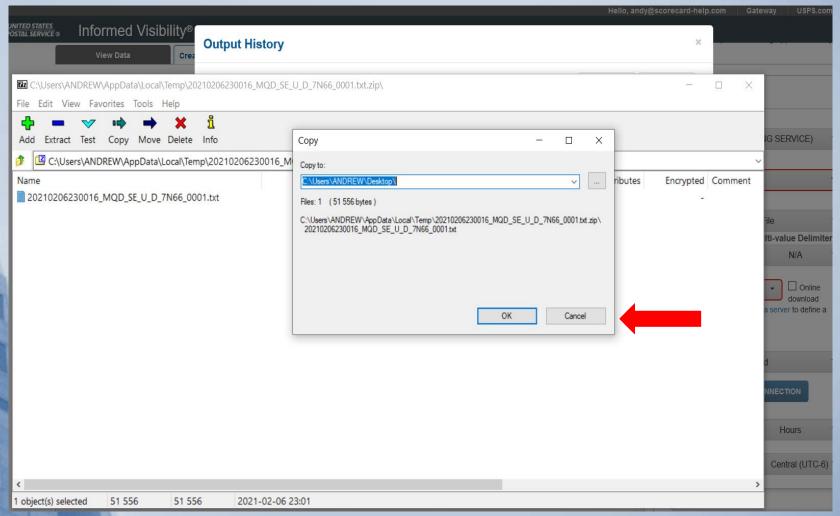


## Simple Data Retrieval IV – Mail Quality Feeds





## Simple Data Retrieval IV – Mail Quality Feeds

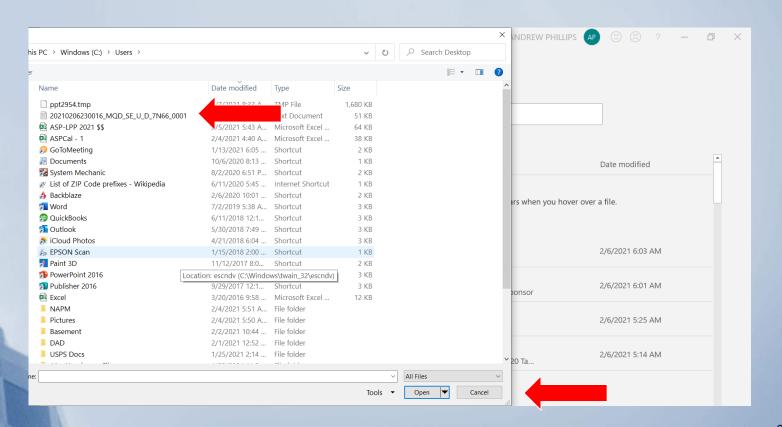




## IV - File Import to Excel

### Text Import Process

OPEN Excel - Click OPEN – Search ALL FILES – Open Text File

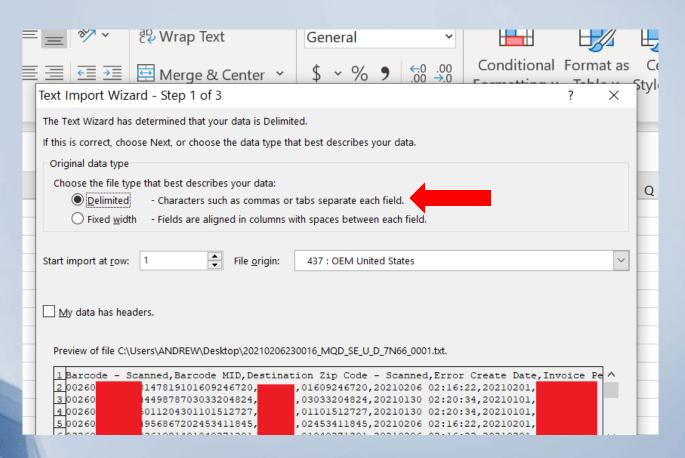




## IV – File Import to Excel

### Text Import Process

Select Delimited - Click NEXT

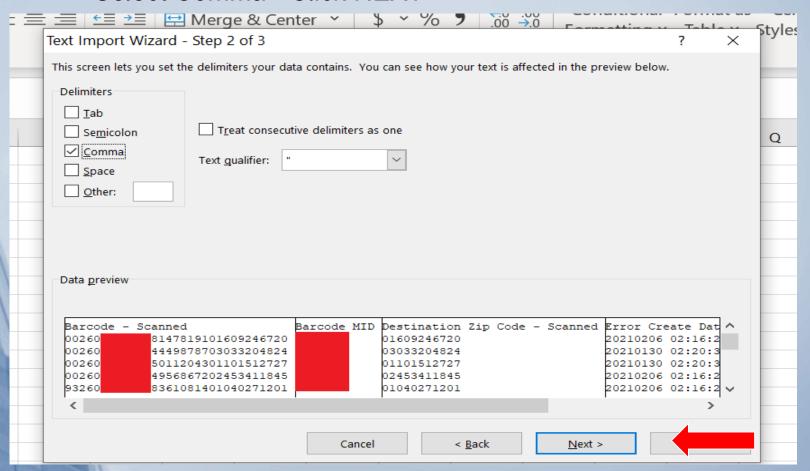




## IV – File Import to Excel

### Text Import Process

Select Comma - Click NEXT

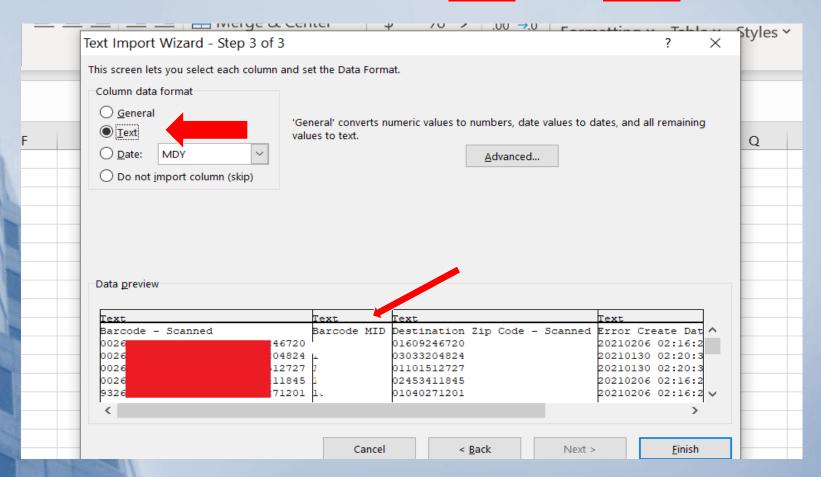




## IV – File Import to Excel

### Text Import Process

Convert All Column Data to <u>TEXT</u> - Click <u>Finish</u>

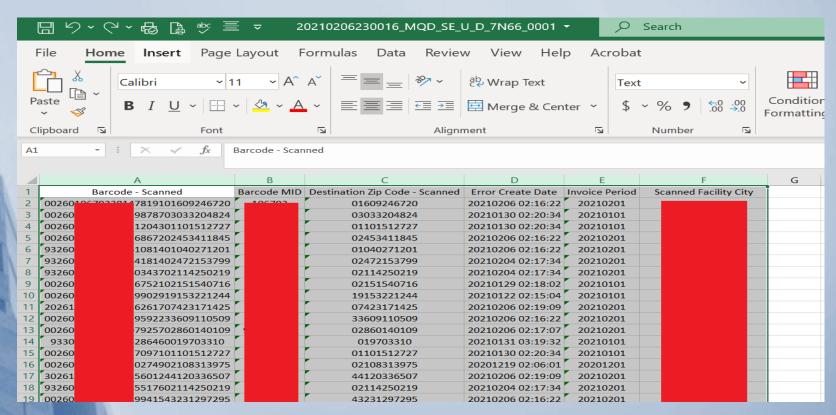




## IV - File Import to Excel

### Text Import Process

The Data you selected in IV Reports is now in Excel





### IV Data File Download Process

### Things You need

- Zip File Manager
- Location to Store raw data & converted IV Excel Files
- Moderate/Advanced Excel Skills
  - Ability to import text files into Excel
  - Create Data Manipulation Formulas
  - Create and Use Pivot Tables for analysis
  - Operational Knowledge and Data skills to see trends in data
- Excel Technique Lessons available on Google/You Tube



## Simple Analysis Ideas

- Sequence Number Analysis
  - Extract the Sequence Number out the IMb
  - Consecutive sequence #'s usually mean a Print to Mail Submission,
     Postal Wizard, or barcoded full-postage
- Zip analysis Scheme, Bin, or mail share issues
- STID / MID Analysis Find errors by customers or department
- Invoice period Validate the pieces in the reports are for the correct month
- You need to find the data analysis points for your operations
- Everyone will have unique situations



### **IV Data Best Practices**

### Set-up a minimum of 2 Mail Quality Feeds for UnDoc

### Daily Feed

Used for daily monitoring of UnDoc issues and initial event investigations

### Monthly Feed

Used for creation of Known UnDoc Log and internal UnDoc investigations

### Create a folder to SAVE IV reports

- On-Line downloads disappear after 7 days from the IV Feed
- Report Feed that download to your FTP Server are saved per your protocol

#### PRACTICE

- Examine data every day/week/month
- Prepare for the unexpected....
- Enjoy the benefits of the data



### **Informed Visibility Data - Resources**

- IV PostalPro Site
  - https://postalpro.usps.com/InformedVisibility
- IV Mail Quality Reports Guide
  - https://postalpro.usps.com/mailing/mqd/instructions
- IV Contact Info
  - IV Solutions Center at 1-800-238-3150, option #2
  - Email: InformedVisibility@usps.gov