



## DAT-MAIL'S 'BCG EXPORT' FEATURE

Mail Service Providers are able to upload identifiers to the USPS® Business Customer Gateway (BCG), after which they can download an Excel spreadsheet containing all data known to the USPS about their clients. This information can be entered into DAT-MAIL™, their presort software, and their job-shop package to be sure that MIDs, CRIDs, Permit info and NPAs are correct. This will help improve by/for identification on the Mail Quality Scorecard and avoid validation failures due to using an incorrect NPA for a non-profit mailing.

**i** *It takes approximately one hour after uploading the identifiers to the USPS BCG for the corresponding client data to be available for downloading from the BCG.*

In a future release of DAT-MAIL Window Book will offer options to import and update at least some of this data into DAT-MAIL's tables. It will also give Mailers an idea which of their clients is giving them incorrect information. If a Mailer is just getting into Full Service for the first time, this feature will make it easy to collect their clients' MIDs and CRIDs to make by/for identification easier.

### HOW IT WORKS

If a company has been designated to be a mail service provider (meaning they are mailing for outside clients), when they login to the Business Customer Gateway they will be able to access a Customer Validation Tool, from which they can perform a bulk search option for their MID/CRID lookup.

Bulk Search

\* indicates a required field.

Search Data Type:  CRID  MID  Permit  Nonprofit Authorization Number (NPA)

Result Data Elements:  CRID  MID  Permit  Nonprofit

Upload a File\*:  MID\_input\_file\_sample\_1.txt

Mailers can upload lists to the USPS but they will need separate lists for each of the identifiers used (CRID, MID, Permit and NPA). Each list can have no more than 250 records. The new BCG Export feature found in DAT-MAIL's Statements utility will create separate files for each of these uploads.

The naming convention of the files generated by DAT-MAIL is <IDENTIFIER>\_<DATE & TIME>\_<File number>. A file name for a CRID upload would look like this: "CRID\_20141109122909\_1". The Mailer would select to do a CRID upload then upload all files generated by DAT-MAIL's BCG Export feature that begin with "CRID". Next, they would then switch to MID and upload all files that begin with "MID", etc.



**Window Book recommends *selecting all of the checkboxes that are part of the 'Result Data Elements' (refer to image above) when uploading the tables (i.e. CRID, MID, Permit, and Nonprofit).***

DAT-MAIL will first use a CRID that is either right in the client table or linked to it in the MID/CRID table. If no CRID is found, it tries to find a MID for that client. If no MID is found it will look for an NPA linked to the client. If no NPA is found it will look for a Permit and if no Permit is found it will look for a ghost permit linked to the client.

The USPS will always have DAT-MAIL's client code in the first field of the file Window Book provides. If a linkage to a permit in the client or permit table cannot be found, DAT-MAIL will look at its Job table which records the associations between permits and clients to see if it can find a link to use.

The Mailer may find when they get the data back from the USPS that there was no data associated with an identifier the Mailer sent. This is going to be pretty common with MID's and CRID's since many Mail Owners have provided incorrect information to their Mailers.

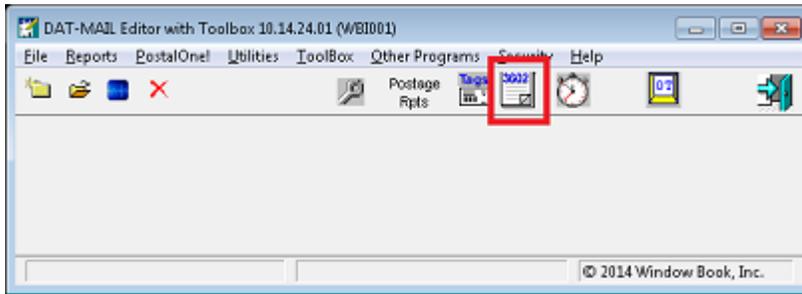
It is possible that another identifier the Mailer has on file is valid, however. So if the Mailer gets back the result that a CRID is invalid, it should be deleted. It is important to make sure it is not actually in the client table and or in the Mailer's MID/CRID table. If the Mailer does the export again, it may pick up another identifier: another CRID, MID, NPA or permit. The Mailer may get luckier the 2<sup>nd</sup> time. It may take a few iterations of the process to do a total cleanup of the Mailer's data.

If DAT-MAIL does not find an identifier for a client a Mailer has on record, this will be added to an 'Error' file. The 'Error' file should not be uploaded to the BCG. The file is easily identifiable as the file name will start with the word "ERROR". The 'Error' file provides a log of the clients that have no identifiers. In DAT-MAIL Window Book uses specific client records as placeholders for certain functions. Those will always appear in the log but they should not be deleted from the client file.

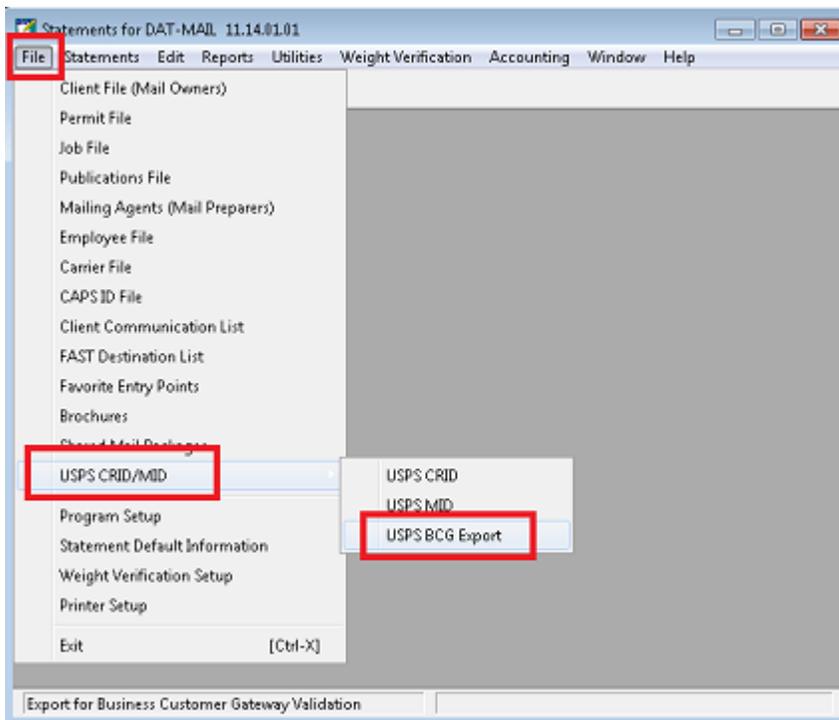
## RUNNING THE BCG EXPORT

To run the BCG Export function, do the following:

1. Launch DAT-MAIL, and from the menu bar across the top of the screen click the Statements or '3602' icon to launch DAT-MAIL's Statements utility;

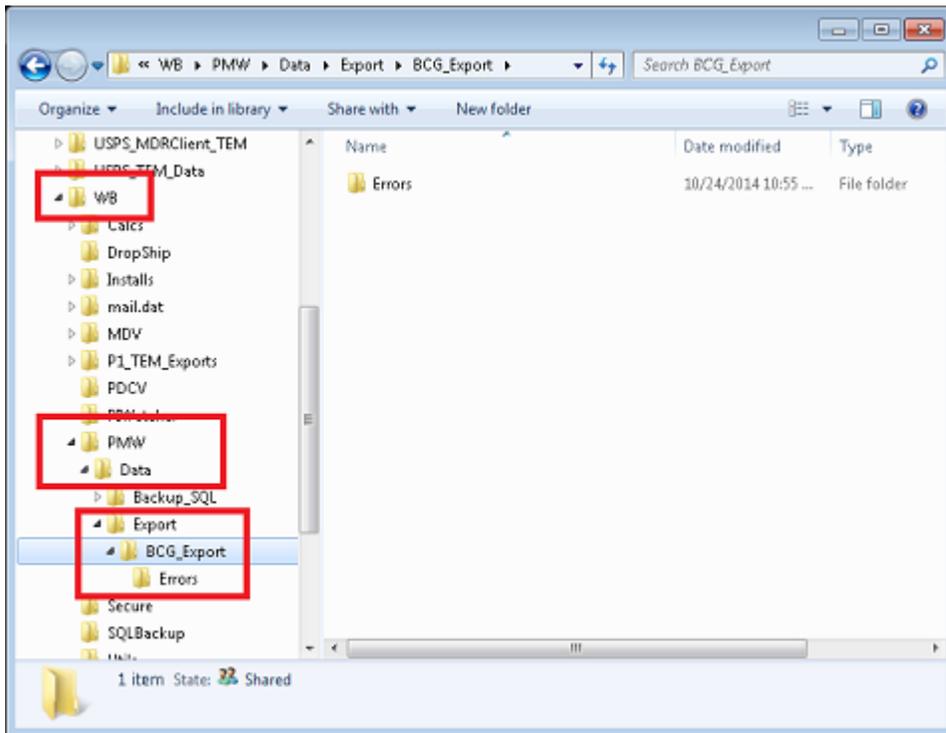


2. From the *Statements for DAT-MAIL* screen, select the 'File' menu option, 'USPS CRID/MID' menu option, and finally 'USPS BCG Export';



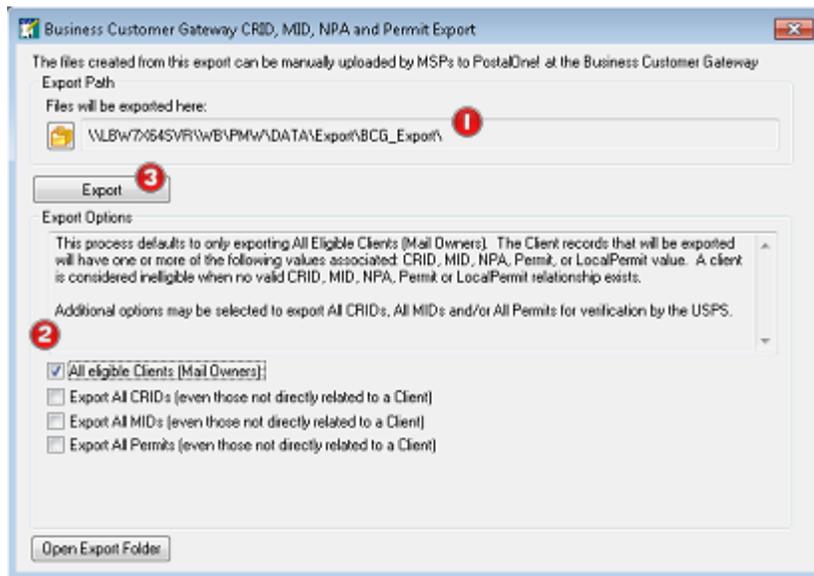
3. The *Business Customer Gateway CRID, MID, NPA, and Permit Export* screen will display;

**i** When the 'USPS BCG Export' menu option is selected, the following folders are automatically created on the computer or server under '*...WB\PMW\Data\*': "*Export\BCG\_Export\Errors*".



In the *Business Customer Gateway CRID, MID, NPA, and Permit Export* screen the file path for the BCG Export folder will be displayed **i** (image below);

The default behavior is to export 'All eligible Clients (Mail Owners)'. To change this, select (check) the desired option <sup>2</sup> (i.e. 'Export All CRIDs (even those not directly related to a Client); 'Export all MID's (even those not directly related to a Client); or 'Export all Permits (even those not directly related to a Client)')).



**i** *Window Book recommends that Mailers use the default setting with the other options unchecked (disabled) the first few times the BCG Export function is used. Typically most client records in DAT-MAIL will be associated with multiple identifiers and Mailers will get a lot of duplicated data back from the USPS if the other options are enabled.*

Click the **Export** button <sup>3</sup>;

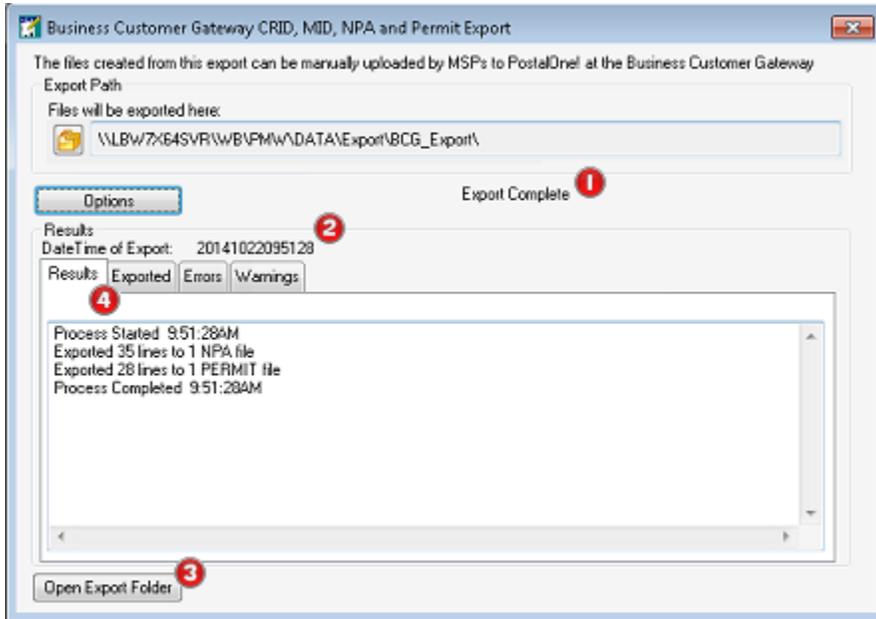
- When the export is complete a confirmation message will display (see image on following the page) <sup>1</sup>;

In addition, a value will be displayed identifying the date and time of export <sup>2</sup>. This date/time stamp is part of the file name of the files that were exported, so if the user clicks the **Open Export Folder** button <sup>3</sup>, the files can be easily referenced.

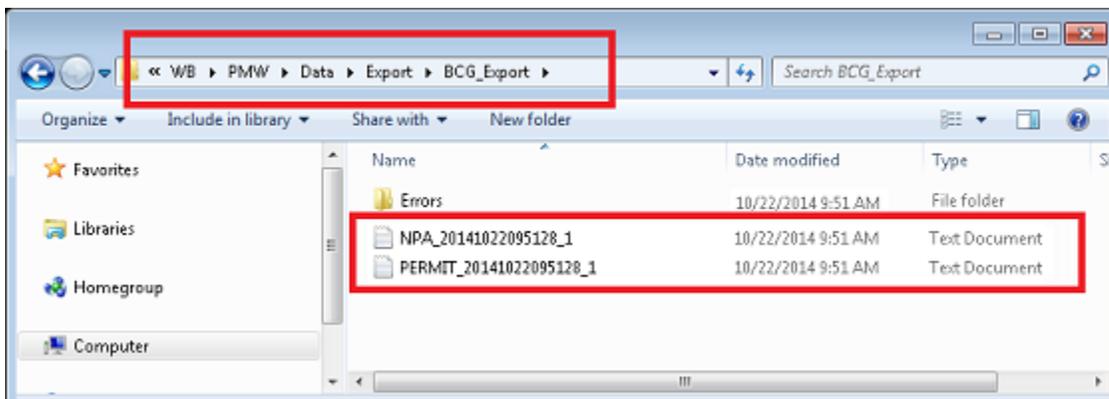
A series of tabs <sup>4</sup> will, when selected, display additional information about the exported data:

- Results Tab:** Displays the details of the export process, including how many and what type of files were exported (in the example here – see screen image below, only 1 NPA and 1 Permit file were created. If an export for a specific identifier includes more than 250 records, it will be broken out into 2 separate files. In other words, if there were 350 NPA identifiers exported, there would be 2 NPA files, one containing 250 records and a second containing 100 records)

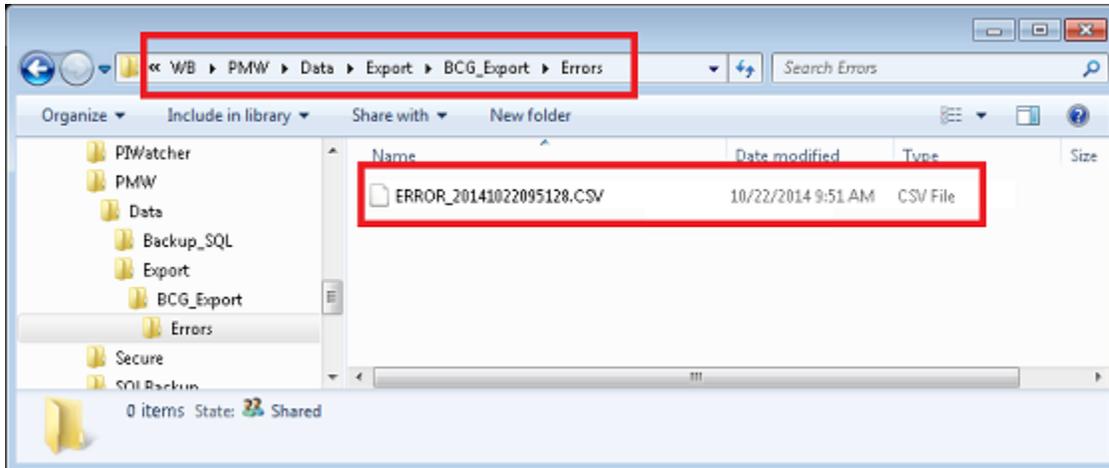
- **Exported Tab:** Displays all the exported data
- **Errors Tab:** Displays all of the errors that were reported for clients that did not have an identifier that could be exported. This same data is exported into a CSV file with the file name beginning with the word 'ERROR'
- **Warnings Tab:** Displays any warnings about the data that was exported



The exported files can be viewed by clicking the **Open Export Folder** button <sup>3</sup>. A Windows explore dialog will open and display the contents of the 'BCG\_Export' folder. File names include the identifier type (e.g. 'NPA') and date/time stamp that is displayed on the *Business Customer Gateway CRID, MID, NPA, and Permit Export* screen after an export occurs to make files easier to identify (refer to call-out <sup>2</sup> above);



Double click the 'Errors' folder located within the "BCG\_Export" folder to view the "ERRORS" file;



5. To view the resulting data from the USPS, using a web browser, go to the *Business Customer Gateway* site (<https://gateway.usps.com/eAdmin/view/signin>), and sign in;

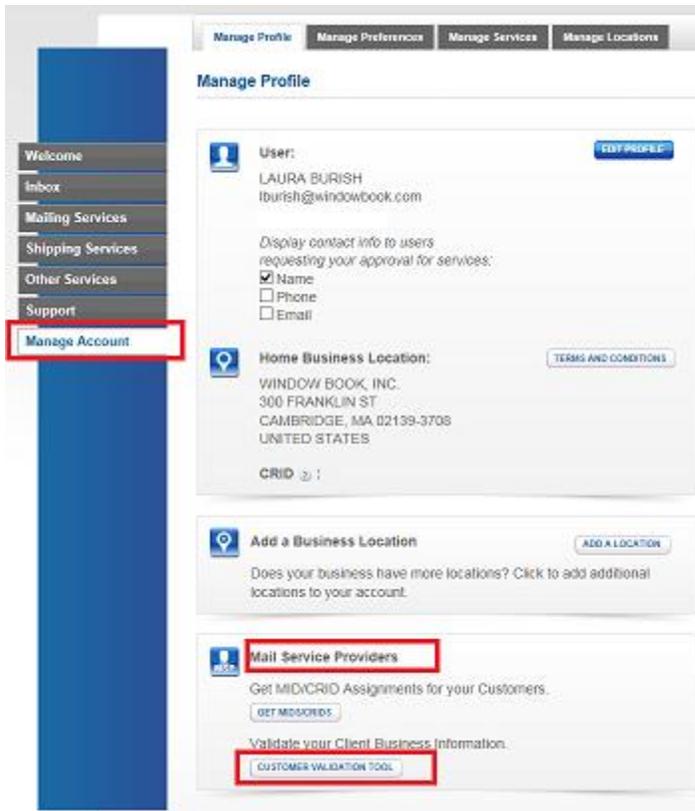


***It takes approximately one hour after uploading the identifiers to the USPS BCG for the corresponding client data to be available for downloading.***

6. From the *Welcome* screen, click the 'Manage Account' menu option;



7. The *Manage Profile* screen will display. Under the 'Mail Service Providers' section, click the **Customer Validation Tool** button;



8. The *Customer Validation Tool* screen will display. From the drop down, select 'Bulk Search';



9. The screen will expand, providing more selection criteria for the Mailer to specify;  
Under 'Search Data Type:' select the data type that corresponds to the file to be uploaded. In the example being used here, 'Nonprofit Authorization Number (NPA)' is selected **1**;

Under 'Result Data Elements:' select (check) all of the displayed options (i.e. CRID, MID, Permit, and Nonprofit) <sup>2</sup>;

**Customer Validation Tool**

This tool is intended to provide Mail Service Providers with a way to validate Mail Owner information. To begin, select a customer identifier from the dropdown below.

Bulk Search

\* indicates a required field.

**1** Search Data Type:  CRID  MID  Permit  Nonprofit Authorization Number (NPA)

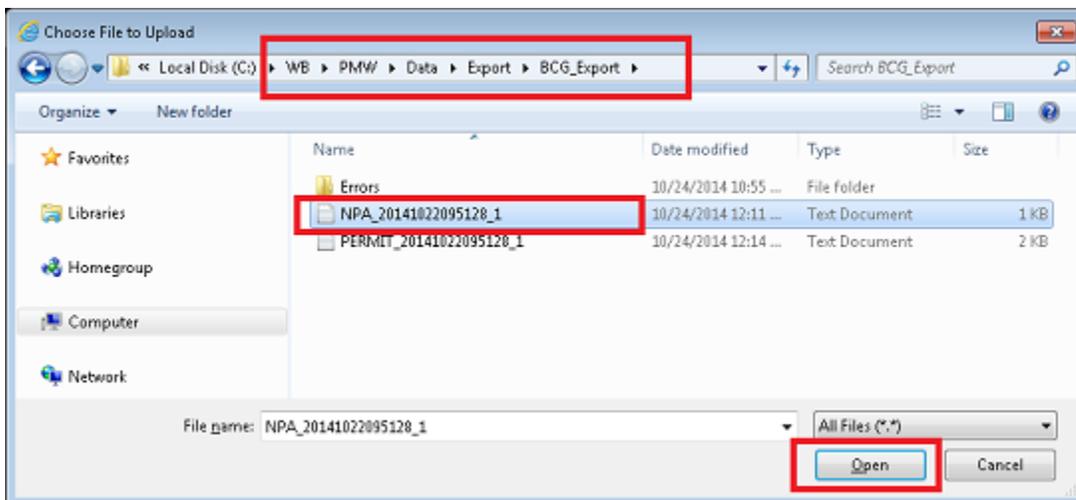
**2** Result Data Elements:  CRID  MID  Permit  Nonprofit

Upload a File\*:  **3** Browse... Search History Results Help (File Format)

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

Search Reset

Click the **Browse...** button <sup>3</sup>. A *Choose File to Upload* dialog will display. Navigate to the 'BCG\_Export folder' (i.e. "...WB\PMW\Data\Export\BCG\_Export") and select the appropriate file to upload (in this example, the NPA file is selected);



With the file selected, click the **Open** button;

10. The *Customer Validation Tool* screen will display. With the appropriate file selected, click the **Search** button;

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Bulk Search

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Result Data Elements:  CRID  MID  Permit  Nonprofit

Upload a File\*: C:\WB\PMW\Data\Export\ Browse... Search History Results Help (File Format)

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

A "Please wait..." message will display while the data search is in progress;

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Bulk Search

\* indicates a required field.

Search Data Type:  CRID  MID  Permit  Nonprofit Authorization Number (NPA)

Result Data Elements:  CRID  MID  Permit  Nonprofit

Upload a File\*:  Browse... Search History Results Help (File Format)

IE Users: If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

The uploaded file is being processed - Please wait ... 

When the search is complete, the resulting .xlsx data files will be displayed at the bottom of the screen (see image below). Individual files can be opened or downloaded by clicking on the file name;

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Search Data Type:  CRID  MID  Permit  Nonprofit Authorization Number (NPA)

Result Data Elements:  CRID  MID  Permit  Nonprofit

Upload a File\*:

**IE Users:** If the file upload is not working for your Internet Explorer (IE) version, please click [here](#) to upload a file.

**Search History Results**

Please click the links for available download results.

**NOTE:** The Search History will display less than 25 files within the last 7 days.

Upload Time	Upload File	Download File
Oct 22, 2014 9:16:39 AM	NPA_20141022085445_1.TXT	<a href="#">33568119_NPA_13228_2014102291740.xlsx</a>
Oct 22, 2014 9:16:20 AM	PERMIT_20141022085445_1.TXT	<a href="#">33568119_Permit_14227_2014102291720.xlsx</a>
Oct 22, 2014 9:15:59 AM	MID_20141022085445_1.TXT	<a href="#">33568119_Mid_17226_201410229170.xlsx</a>
Oct 22, 2014 9:12:39 AM	CRID_20141022085445_1.TXT	<a href="#">33568119_Crid_11225_2014102291342.xlsx</a>

Repeat the search steps for the remaining data types (i.e. in this case, CRID, MID, and Permit would be the remaining data types), making sure to select (check) all four 'Result Data Elements' (i.e. CRID, MID, Permit, Nonprofit) for each.