

# **INFORMED DELIVERY®**

## Mailer Campaign Portal User Guide

Purpose of the Document To provide users with step-by-step instructions to navigate the self-service Mailer Campaign Portal.

United States Postal Service®, Product Innovation, Version 2.3

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#### Change History

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#### 1. Getting Started

Informed Delivery is an optional, free feature that gives residential consumers the ability to digitally preview their mail and manage their packages scheduled to arrive soon. Mailers can use this feature to engage users through synchronized direct mail and digital marketing campaigns. The <u>Informed Delivery for Business Mailers & Shippers</u> website offers a variety of resources regarding Informed Delivery interactive campaigns:

- Informed Delivery Overview: Introduction to Informed Delivery and how the feature works
- Interactive Campaign Guide: Detailed information on how to conduct campaigns, run Precampaign Analyses, and interpret Post-campaign Analyses
- Campaign Image Requirements: Campaign design best practices and specifications (e.g., image sizes, content, and file types)
- Interactive Campaign FAQs: Answers to the most frequently asked questions from mailers
- Informed Delivery Campaign Parameters: Learn more about the function of the campaign URL opt-in/opt-out feature

The Mailer Campaign Portal (MCP) was created for self-serve entry and management of Informed Delivery interactive campaigns. This document does not describe what is needed to conduct a campaign; it only talks to how to enter campaigns into the Portal. To ensure that you are ready to enter a campaign in the Portal, review the resources on the website linked above. The key to efficient campaign entry is to have all your campaign elements ready!

#### 1.1. Mailer Campaign Portal Access

The Informed Delivery MCP provides businesses the ability to enter and initiate interactive campaigns, view campaign data and results, create campaign templates, store media, and more, all in one convenient location from the USPS® <u>Business Customer Gateway (BCG)</u>. This *User Guide* explains the MCP's functionalities, as well as how to navigate its various self-service features.

In addition to the MCP, *PostalOne!*® offers a second, and electronic, campaign entry method.

- Refer to the <u>Informed Delivery for Business Mailers and Shippers</u> website for information on *PostalOne!* Customer Acceptance Testing (CAT).
- Campaigns entered through *PostalOne!* flow into the Portal for the purposes of viewing campaigns, cancelling campaigns, and Post-Campaign reporting only.

#### 1.2. Logging In

Any individual with a BCG account can navigate to the MCP:

- Log into the BCG by entering a valid username and password in the corresponding fields.
   If you do not have an account, create one. To link accounts for a single business, see Appendix B or the material provided in the "Help" section on the main BCG page.
- Select the "Other Services" option on the left sidebar of the BCG homepage (Figure 1).
- Locate the "Informed Delivery® Mailer Campaign Portal" row.
  - First time users must click on the "Get Access" button in this row.
    - Access to the MCP is granted by the Business Service Administrator (BSA) for the MCP. For new accounts, where new BSA rights are being requested, approval from the Informed Delivery office is required. New users requesting BSA rights will be fully vetted prior to approval. Users should allow 2-3 business days for this approval process to be completed. See the material provided in the BCG "Help" section for more information on BSA's in general.

| BUSINESS CUSTOMER GAT  | EWAY Home Hello Informed Delivery!                         |
|--|--|
| Mailing Services Shipping Services Additional Services   | OAlerts ⊠Pending Requests & Manage Account - USPS.com Help |
| Additional Services  |  |
| Additional services help you do more.<br>Additional online services available below<br>manage a variety of tasks from preparation to tra<br>shipments. You may access services directly from<br>approved for and request access to those you do not. | ansporting of mailings and                                 |
| Approved Shipper more info >   | Go to Service  |
| Audit Mailing Activity (PostalOnel) more info >  | Go to Service  |
| + Bulk Indemnity Claims more info >  | Get Access   |
| ⊕ Business Service Network (BSN) eService more info  | Go to Service  |
| Commercial PO Box Redirect Service more info >   | Go to Service  |

Figure 1: "Other Services" Tab in BCG

- Returning users that have been granted access select the "Go to Service" button.
- You will be taken to the MCP Welcome Page (Figure 2).

The "How Informed Delivery Works" link redirects users to the <u>Informed Delivery for Business</u> <u>Mailers & Shippers</u> website. The resources and material on this website will help you understand and gather all your campaign elements ahead of time so you can complete your campaign entry in under three minutes!



Figure 2: Welcome Page

#### 2. Campaign Categories

Within the Portal, there are five categories that reflect the status of a campaign throughout its lifecycle:



- **Draft**: A campaign that has been saved as Draft, but not Submitted.
  - Users are not required to populate all fields or upload digital assets before "Saving as Draft."
  - $\circ\;$  These campaigns can be finalized and submitted at a later date.
  - o Draft campaigns are the only campaigns that can be deleted.
- **Submitted:** A campaign with all entries completed (e.g., required fields and digital assets) that is pending activation at a future date.
  - The campaign status will become Active upon the designated StartDate.
  - Active: A campaign that is between the designated Start Date and EndDate.
    - o Users can view or download interim Post-campaign results.
    - An Active campaign cannot be edited; it can only be Cancelled.
- Completed: An Active campaign that has reached its End Date.
   Users can view or download final Post-campaign results.
  - **Cancelled:** A campaign that was Submitted or Active but was Cancelled.
  - Users can view or download Post-campaign results *if* the campaign was Active for at least one delivery day.

Important Note: Draft campaigns are subject to deletion after one month. Retention programming for other campaigns has not been completed at this time. Retention periods will be provided in a future User Guide update.

#### 3. Campaign Creation

Start by selecting "Create a Campaign" from the Welcome Page. Choose either "Create a New Campaign" or "Create Campaign from a Template" (Figure 3).

- Users will only be provided the "Create a Campaign from a Template" option if templates are available (a Template can only be created after the Submission of a campaign).
- When a user selects "Create a New Campaign," the MCP automatically creates a Draft campaign—regardless of whether any campaign elements were entered.

Important Note: Pop-up windows in the Portal contain a gray "X" in the upper right-hand corner (denoted with a red circle and arrow in Figure 3). Users can click this "X" to close the window.

|   | (2) Welcome, Takak |
|---|--------------------|
| Select How to Create Your Campaign  |                    |
|   |                    |
| ⊖ Create a New Campaign   |                    |
| Build a completely new Informed Delivery campaign from start to finish.                         |                    |
|   |                    |
| ○ Create Campaign from a Template   |                    |
| Choose a previously saved template from your library to create your Informed Delivery campaign. |                    |
|   |                    |
|   |                    |
| Cancel  | Continue           |
|   |                    |

Figure 3: Campaign Creation Options & illustration of "X" used to close open windows

#### 3.1. Step 1 – Describe

Enter the campaign data elements on the first campaign entry screen (Table 1 and Figure 4). The table below provides a description for each required field:

| Elements                              | Description  |
|---------------------------------------|--|
| Brand<br>Display<br>Name              | <ul> <li>This name will show in the "From" field in the Informed Delivery campaign presented to users. It must be the mail owner's name. For example, if an MSP represents Company123, this field should read "Company123." The same Brand Display Name can be used for multiple campaigns.</li> <li>This field can have a maximum of 40 characters including spaces.</li> </ul>   |
| Campaign<br>Title                     | <ul> <li>This field is for internal use only. For example, "AnyBrand Letter Mailing." The same Campaign Title can be used for multiple campaigns.</li> <li>This field can have a maximum of 40 characters including spaces.</li> </ul>   |
| Campaign<br>Code                      | <ul> <li>This field is for internal use only.</li> <li>It must be unique for each campaign. For example, "ABC102218-1"<br/>(company name, campaign Start Date, extension if more than one campaign).</li> <li>This field can have a maximum of 40 characters including spaces.</li> </ul>  |
| Campaign<br>Start and<br>End<br>Dates | <ul> <li>These fields indicate the dates when the campaign will begin and end.</li> <li>USPS suggests that the Start Date is three days prior to, and the End Date is three days after the target in-home date(s).</li> <li>The campaign Start Date cannot occur in the past.</li> <li>The Start Date and End Date duration cannot be more than 45 days for sequential campaigns.</li> <li>The Start Date and End Date duration cannot be more than 60 days for MID level campaigns.</li> </ul>  |
| Mailer ID<br>(MID)                    | <ul> <li>The MID must be six or nine numeric digits in length; this is the MID that will be on the mailpieces sent.</li> <li>If this is a shared MID or multiple campaigns are conducted at the same time, then the Intelligent Mail® barcode (IMb®) Serial Number Range is also required.</li> <li>The MID can belong to the mail owner or a Mail Service Provider (MSP). The company that addresses and prints the IMb's on the mailpieces will know this number.</li> <li>The user of the MID must get approval from the MID owner prior to using a MID to conduct a campaign.</li> </ul> |

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| Elemen                      | s Description  |
|-----------------------------|--|
| IMb Seri<br>Number<br>Range | <ul> <li>This range is required if the campaign level is IMb Serialized (see the <i>Interactive Campaign Guide</i> for more information on campaign levels).</li> <li>Campaigns using a shared MID <b>must each have a unique and sequential IMb</b> Serial Number Range. This must be a six- or nine-digit number (depending on length of the MID).</li> <li>The company that addresses and prints the IMb's on the mailpieces will need to derive and provide this range.</li> </ul> |
| Mailpiec<br>Shape           | <ul> <li>Indicate the type of mailpiece— "Letter", "Card", or "Flat"—based on the postage<br/>payment rate.</li> </ul>   |

Table 1: Campaign Elements and Descriptions

Important Notes: Campaigns must be submitted prior to 12:59 PM local time the day before the campaign Start Date. Submitted campaigns cannot be edited within this window. They must be cancelled and re-entered. No updates are allowed after the campaign is Active; Active campaigns can only be cancelled (and re-entered using a new unique Campaign Code). Campaigns become active at 12:00:01 (just past midnight) of the start date. Campaigns end at 11:59:59 (just before midnight) of the end date.

The submitter of the campaign is responsible for securing the MID owner's permission to use the MID prior to conducting a campaign.

| Tell us about your campaign.   |   |          |
|--|---|----------|
| Provide information that determines when your ca   | npaign will go live and the audience it wil | l reach. |
| Brand Display Name   | 0   |          |
| Enter or select the campaign Display Name  |   |          |
| Campaign Title   |   |          |
| Enter a Campaign Title   |   |          |
| Campaign Code  | 0   |          |
| Enter the company's Campaign Code  |   |          |
| Campaign Start and End Dates<br>In order to optimize your campaign, we recommend selecting a start<br>days before and an end date 3 days after your in-home delivery date<br>Select date range |   |          |
| Select date range  |   |          |
| Mailer ID (MID)  | $\bigcirc$                                  |          |
| Enter or select a 6 or 9 digit MID   |   |          |
| Intelligent Mail® Barcode (IMb) Serial Number Range  | $\bigcirc$                                  |          |
| Enter 6 or 9 digit start number  |   |          |
| to   |   |          |
| Enter 6 or 9 digit end number  |   |          |
|  | 0   |          |
| Mailpiece Shape  |   |          |

Figure 4: Describe Page

#### 3.2. Step 2 – Build

Upload supplemental content (Figure 5). This includes providing the **required** Ride-along Image and entering your target URL. Of note, Ride-along Images must directly relate to the promotion or offer contained in the mailpiece. Ensure that the images meet the criteria as stated in the *Campaign Image Requirements* document on the <u>Informed Delivery for Business Mailers & Shippers</u> website.

Follow the steps below to add the required Ride-along Image and URL:

- Click on the "Insert a ride-along image" box in the lower left-hand corner of the screen (Figure 5).
- A module will appear on the right-hand side with "Insert Image" and "Link Image" sections.
- Within the "Insert Image" section, select "Upload" to upload a new Ride-along Image (images must be accessible from the computer you are using). Alternately, you can select an image that was previously saved to your Media Library.
- Then select "Insert" to complete the image upload.
  - Figure 5 shows an example where two images are available to select from the Media Library.
- In the "Link Image" section, enter your target URL for your Ride-along Image. The link must start with "https." In addition, the link must lead to a landing page directly associated with the physical mailpiece utilized in the Campaign.
- Be sure to select "Test Link" to verify the link is correct.

|   | USPS.COM* Informed Delivery  | Campaigns   | Media                            | How It Works   |                             |
|---|--|---|----------------------------------|--|-----------------------------|
|   | Campaigns >  |   |                                  |  |                             |
|   | Describe   | Ball  | Roviow                           | Submit   |                             |
|   |  | <u>View all</u>   | mail on Dashboard                | Ride-Along Image   |                             |
|   | From:  | _   |                                  | Enhance the customer call to action<br>with a full color, interactive image.<br>Recommended sking:<br>300px by 200px.                                      | Upload Ride-<br>Along Image |
|   | Replace grayscale mailplece ima<br>Recon<br>780px by 500   | presentative Image<br>ge with an optional color Repres<br>nmended Sizing:<br>Opx (Lendscape orientation)<br>00px (Portrait orientation) | sentative image                  | Insert Image<br>Upload Image<br>Upload<br>Upload<br>Upload<br>Upload an Image to insert it into your<br>cempaign   |                             |
| Select the "Insert a<br>Ride-along Image" | Insert a ride along Image<br>Recommended String:<br>300pt y200px   | Do more with yo   |                                  | Link Image ()<br>Link the image to a preferred website.<br>Note: URL must be https://<br>ex: www.sbocompany.co/<br>By oreating a campaign you are allowing | Insert Target<br>URL        |
|   | Campaign Preview   |   |                                  | users to share the target URL through social media sites   |                             |
|   | Opt-out of Campaign Tracking Paramet<br>Note, tracking parameters are turned on by defa<br>wish, use the check-box below to opt out of the t | ault. Before proceeding, use the t  | test link button above to verify | the campaign URL functions as expected. If you   |                             |
|   | By checking this box, you are choosing   | ng not to add the MID and se  | erial number to the Target       | URL  |                             |
|   |  |   | Save                             | as Draft Save and Continue   |                             |
|   | Figure 5: Build Page -   | - Inserting Rid   | de-along Ima                     | age and URL  |                             |

Follow the steps below to return to the "Build" page and test the URL associated with your campaign.

- Select the desired campaign from the Welcome Page or "Campaigns" tab.
- On the Campaign Summary page, go down to the Campaign Media section and select the "Edit Media" button. This will take you to the "Build" page.
- Click on the Ride-along Image section (like you did when you first created the campaign).
- The Ride-along Image and Link Image options will appear on the right-hand side of the screen.
- Use the "Test Link" function that is provided in the Link Image section.
- Important Notes: The maximum length for the target URL is 255 characters. The Portal will display an error message if the URL is longer than the maximum allowable length.

#### Target URL

Informed Delivery has released a system update to send campaign Mailer ID (MID) and Serial Number information in the form of URL parameters when consumers click on interactive campaign Target URLs. This update enables additional data to be captured, allowing mailers to better understand Informed Delivery driven referrals. Additionally, this update enables Target URL webpages to be dynamic based on campaign MID and Serial Number.

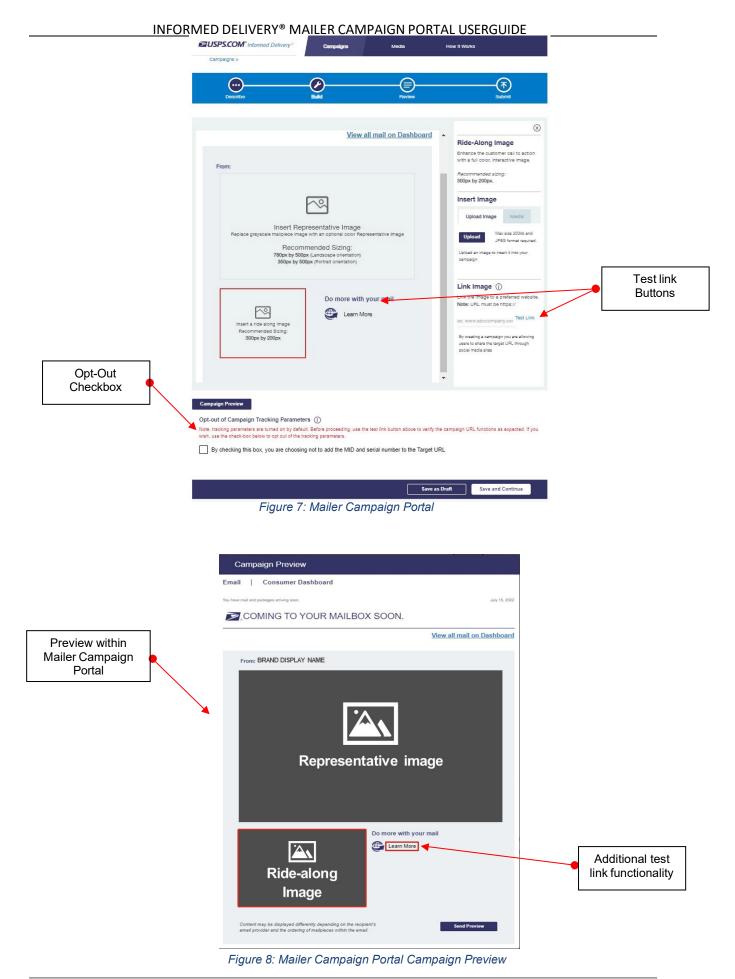
Please be advised, the URL parameters may not be compatible with all campaign Target URLs. Webpage redirects may not function properly when Informed Delivery passes the parameters. If the URL being used in the campaign is a redirect, the end destination URL must be entered as the Target URL for the interactive campaign. The *Campaign Parameters PDF* document on the <u>Informed Delivery for Business Mailers & Shippers</u> website contains information about the function of the campaign URL opt-in/opt-out feature.

### It's recommended that URLs are tested in the Mailer Campaign Portal (MCP) prior to campaigns being submitted (Figure 7).



Figure 6: Sample Target URL with parameters

Mailers can opt-out of Informed Delivery URL parameters when submitting a campaign via the Mailer Campaign Portal (MCP). Currently, all the test link functionality within the MCP adheres to the opt-in/out selection (Figure 7). When the email preview or campaign "proof," is sent from the MCP via the "Send Preview" button (Figure 8), the campaign preview includes the opt-out selection for the URL parameter feature.



#### **Digital Images**

Digital image color types (sometimes referred to as profiles) must be RGB (CMYK version is generally used for printed material). If the image is not the proper color type, then the image upload will fail; however, an error message is not provided. An error message will be added for this in the future.

#### **Representative Image:**

- Click on the "Insert Representative Image" box in the middle of the screen (Figure 9).
- A module will appear on the right-hand side with "Insert Image" and "Link Image" sections.
- Within the "Insert Image" section, select "Upload" to upload a new Representative Image.
- Then select "Insert" to complete the image upload.
  - Information on using "Media" can be found in Section 6 of this document.

The Representative Image must be clearly branded and must be directly related to the hardcopy mailpiece. A Representative Image is **optional** for letters / postcards; however, it is **required** for flat campaigns. As a reminder, flat-size mail has fewer scan events and less visibility than letters / postcards due to differences in processing.

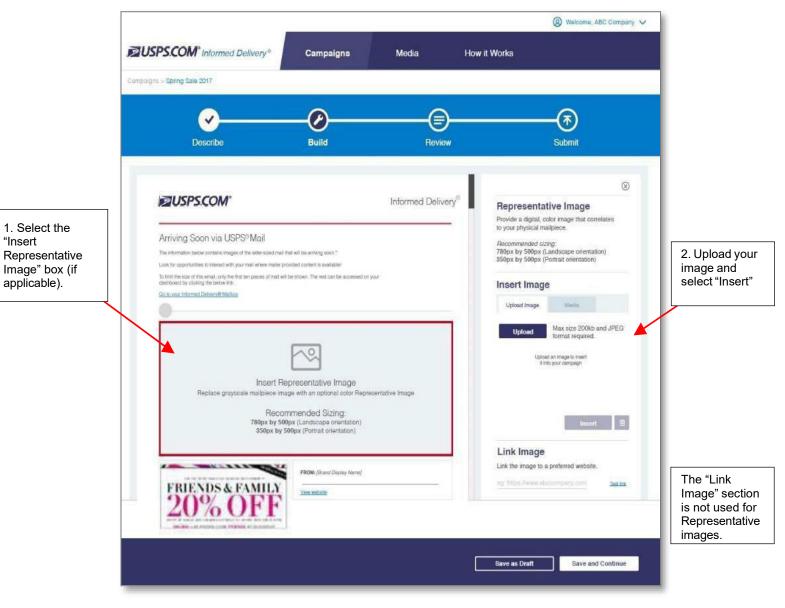


Figure 9: Build Page – Inserting Representative Image

In the Review screen, you will see that the Representative Image is "encouraged." If a Representative Image is not provided, the campaign display to the user will be adversely impacted.

At any time during the campaign creation process, users can select "Save as Draft" or "Save and Continue" to keep working on the campaign. The *Campaign Image Requirements* document on the <u>Informed Delivery for Business Mailers & Shippers</u> website contains information about design and image requirements (e.g., dimensions, formats, etc.).

#### **Optional Campaign Preview**

An optional Campaign Preview is available from the Review page.

- Select the "Campaign Preview" button at the bottom of the page.
- View a digital preview of the email notification consumers will receive.
  - Select "Send Preview" and enter up to five email addresses to send this digital preview email notification to yourself or others in your organization. Note: A maximum of five campaign preview emails is allowed per campaign code, per day.
  - Currently, preview emails contain a campaign identifier in the subject line of the email to distinguish between campaigns and a "Test Only" banner to ensure the email is more distinguishable as a preview email and not a real daily digest email (Figure 10).
- View a digital preview of the campaign on a mockup of a consumer's dashboard by selecting the "Consumer Dashboard" option at the top of the screen.

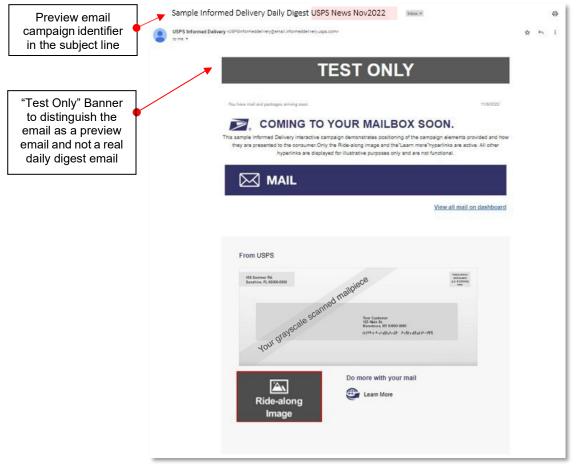


Figure 10: Mailer Campaign Preview Email Notification

#### 3.3. Step 3 – Review

Review the campaign elements before submission.

• Click the "Edit Description" box to return to the Describe step or "Edit Media" box to return to the Build step to make changes to the campaign (Figure 11).

|  |           |   |               | (a) Welcome, ABC Company ~ |
|--|-----------|---|---------------|----------------------------|
| USPS.COM <sup>®</sup> Informed Delivery® | Campaigns | Media   | How it Works  |                            |
| Campaligns > Spring Gale 2017            |           |   |               |                            |
| ✓  | <b>~</b>  |   | )             | <b>—</b> (Ŧ)               |
| Describe                                 | Build     | Revi  | CW            | Submit                     |
| Campaign Description                     |           |   | Edit          | Description                |
| Brand Display Name                       |           | Mailer ID (MID)   |               |                            |
| ABC Company                              |           | 1230981392  |               |                            |
| Campaign Title                           |           | Intelligent Mail® Ba                                    | rcode (IMb)   |                            |
| Spring Sale 2017                         |           | Serial Number Ran                                       | ge            |                            |
| Campaign Code                            |           | 123568  |               |                            |
| 90234                                    |           |   |               |                            |
| Campaign Start and End Dates             |           | Mailpiece Shape   |               |                            |
| 01/20/17 - 01/28/17                      |           |   |               |                            |
| Campaign Media                           |           |   |               | fdt Modia                  |
| Representative Image                     | Ride-alc  | ng Image  |               |                            |
| Parameteria Page 31                      |           | ENDS & FAM<br>D% OF<br>Maga UII.<br># abcongurysale.com | F             |                            |
|  |           |   | Save as Draft | Bave and Continue          |

Figure 11: Review Page

- The Review page will indicate if required fields are missing. A red "X" icon will appear next to any field that requires additional action (Figure 12).
- Selecting "Save as Draft" at this point saves the campaign information so it can be edited and submitted later. Selecting "Save and Continue" at this final stage will take users to the Submit page (Figure 11).
- Important Notes: When working with Draft campaigns, you **must** go into the "Edit Description" or "Edit Media" function from the "Review" page before you can "Save and Continue" (Figure 12). The Representative and Ride-along Images may appear stretched on the Review page. If the images meet the requirements outlined in the *Campaign Image Requirements* on the Informed Delivery for Business Mailers & Shippers website, the images will correctly appear in the consumer's Informed Delivery notification.

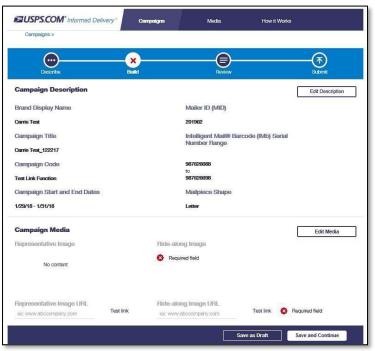


Figure 12: Review Page – Illustrating Missing Required Elements

#### 3.4. Step 4 – Submit

If all of your campaign's elements have been entered and are correct, select "Submit Campaign" (Figure 13). This will result in the campaign showing a Submitted status on the Welcome Page and "Campaigns" tab. The campaign will become Active on the designated Start Date.

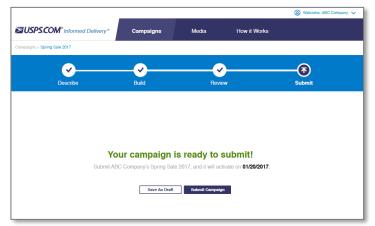


Figure 13: Submit Page

If campaign elements are still missing or incorrect at this stage (Figure 14), return to the "Describe" or "Build" pages, as applicable, to finalize the campaign entries. Selecting "Save As Draft" saves the campaign information so it can be edited later.

Important Note: Users can edit a Submitted campaign until 12:59 PM local time the day before the campaign Start Date.

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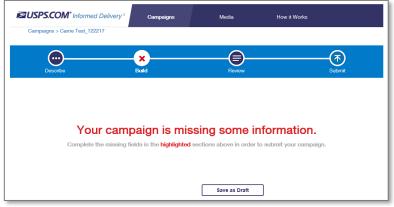


Figure 14: Submit Page – Indicating Missing Campaign Elements

#### 4. Reports

Users can get reports both before and after a campaign. See the *Interactive Campaign Guide* on the <u>Informed Delivery for Business Mailers & Shippers</u> website for details on report criteria, contents, calculations, and samples.

#### 4.1. Pre-campaign Analysis Report

The optional Pre-campaign Analysis Report allows users to evaluate their campaign reach within a specific mailing list. Users can initiate this report from the Welcome Page (Figure 2, under the "Create a Campaign" button) or within the "Pre-campaign Analysis" tab.

- Enter a name for this report first; this title is for internal use only and is meant to help differentiate between multiple Pre-campaign Analyses (Figure 15).
- Select "Upload ZIP11 File" to access the file that was previously saved on your computer (that meets the criteria outlined in the *Interactive Campaign Guide*).

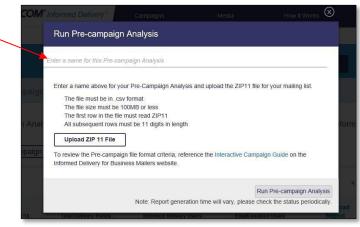


Figure 15: Pre-campaign Analysis Naming Window

The amount of time required to generate report results depends on the size of the 11-Digit Delivery Point ZIP Code list. The report will be posted on the Pre-campaign Analysis tab (Figure 15). The Pre-campaign Analysis Report represents the Informed Delivery user base at the exact moment the report is generated, against a particular list of 11-Digit Delivery Point ZIP Codes. For instance, if a user initiates a campaign several days after the Pre-campaign Analysis, the number of users may have changed.

If an invalid file is uploaded in the Mailer Campaign Portal, the mailer will receive an error message explaining the file issue(s) that prevented a successful upload.

Important Note: Details of the requirements for the file format, contents, and file size limitations are provided in the *Interactive Campaign Guide*. The Appendix of the *Interactive Campaign Guide* provides helpful information to help you resolve error messages and address inaccuracies in your pre-campaign file. This report is NOT required to conduct a campaign. This analysis can be conducted in the MCP regardless of the campaign entry/submission method.

#### 4.2. Post-campaign Analysis Reports

Participating businesses and organizations that enter campaigns in the MCP can gather valuable insights from their campaign data using Post-campaign Reports. The MCP will generate a Post-campaign Summary Report and Detailed Report for every Active campaign every morning. These reports will automatically appear in the Post-campaign Analysis tab. Post-campaign data on Cancelled campaigns will only be available if the campaign was Active prior to being cancelled.

- Important Note: Reports will be automatically removed from the MCP 30 days after their completion timestamp. Incomplete reports are not automatically removed at this time, however, users can manually delete these reports. Examples of incomplete reports include those labeled as "In-Process" or "An error occurred while processing the report. Please try again later."
- These reports are available every day that the campaign runs; however, the final Postcampaign summary report (pulled after the campaign is Complete) provides the cumulative and final campaign performance information.
- After reports are removed from the Post-Campaign Analysis tab, they will no longer be available to download. We can provide Summary reports upon request. To request Post-Campaign Summary reports, submit a request with the Campaign Title(s) and Campaign Code(s) to our Campaigns Help Desk at <u>uspsinformeddeliverycampaigns@usps.gov</u>.

#### 5. Campaign Management

Selecting the "Campaigns" link in the MCP directs users to a page where they can browse existing Campaigns, Templates, Pre-campaign Analysis, and Post-campaign Analysis information (Figure 16).

| C C                                     | ampaigns                          |                          |                |               |               | C             | Create a Carr   | npaign          |
|---|-----------------------------------|--------------------------|----------------|---------------|---------------|---------------|-----------------|-----------------|
| Campai                                  | gns Template                      | s Pre-can                | npaign Analysi | s Post-ca     | ampaign Analy | sis           |                 |                 |
| Search                                  | for a Brand Dis                   | play Name,               | Campaign T     | itle, or Carr | npaign Code   |               |                 | Q               |
|   |                                   |                          |                |               |               |               |                 |                 |
| Recent                                  | ly Modified                       | ✓ Statu                  | s •            |               |               | < 1           | 2 3 4 5         | 110 >           |
|   | IY Modified<br>BRAND DISPLAY NAME | Statu     CAMPAIGN TITLE | S -            | CAMPAIGN END  | CAMPAIGN CODE | < 1<br>SOURCE | 2 3 4 5<br>түре | 110 ><br>status |
| CAMPAIGN ID                             |                                   |                          |                | CAMPAIGN END  | CAMPAIGN CODE |               | 1.000           | Laceba reeva    |
| CAMPAIGN ID<br>1200166781<br>1200167093 | BRAND DISPLAY NAME                | CAMPAIGN TITLE           | CAMPAIGN START |               |               | SOURCE        | TYPE            | STATUS          |

Figure 16: "Campaigns" Tab and Available Sub-Tab Options

The date in gray text that appears below the Campaign Title represents the date the campaign was created or most recently updated.

#### 5.1. Browsing Campaigns

Users can view a limited number of campaigns on the Welcome Page. All campaigns are displayed on the "Campaigns" tab.

- The search bar on the "Campaigns" tab allows users to filter campaigns by specific text. The search bar is case and character (e.g., additional spaces or punctuation) sensitive.
- Clicking on any campaign element in the campaign list (i.e., "Brand Display Name," "Campaign Start," "Status," etc.) will redirect the user to a page displaying information for that specific campaign.
- Users can edit Draft and Submitted campaigns after clicking on a specific campaign.

Additionally, users can select the "Actions" drop-down menu to take further action on a specific campaign, based on the campaign status (Figure 17).

- Select any campaign from the Welcome page or Campaignstab.
- Select "Preview Campaign" in the drop-down list to view a campaign as an Informed Delivery user would see it: in an email or dashboard notification view.
- Delete Draft by clicking "Delete Draft."
- Cancel a Submitted or Active Campaign by selecting "Cancel Campaign."
- View campaign data by clicking "Generate Report" if the campaign is Active, Cancelled (with activity), or Completed.

#### 5.2. Creating a Campaign from a Template

Users can expedite the campaign creation process by building a campaign from a template (Figure 18). A template pre-populates some campaign fields with information from previous campaigns. Users are still able to edit fields and provide new campaign information. This feature only becomes available after a campaign is Submitted.

|   |                |           |         | ( Welcome, C | rrie V |
|---|----------------|-----------|---------|--------------|--------|
| USPS.COM* Informed Delivery                         | Campaigns      | Media     | How     | rt Works     |        |
| Campaigns > May Mail Service Providers              |                |           |         |              |        |
| USPS  | 5/16/18        | 5/16/18   | 5/18/18 | 6/7/18       |        |
| May Mail Service Pr                                 | <u> </u>       |           |         | <b>—</b>     |        |
| oviders   |                | Submitted |         | Complete     |        |
| View campaign information, preview, or delete the d | raft campaign. |           |         |              |        |
| Actions<br>Generate Report<br>Preview Campaign      |                |           |         |              |        |
| Actions<br>Generate Report                          |                |           |         |              |        |

Figure 17: Campaign Actions

| TEMPLATE NAME             | BRAND<br>DISPLAY NAME | CAMPAIGN TITLE     | MAILER ID<br>(MID) | ACTIONS          |
|---------------------------|-----------------------|--------------------|--------------------|------------------|
| ABC Winter Sale           | ABC Company           | Winter 2022 Sale   | 123991292          | Select an Action |
| Alternate Electric Annual | Alternate Electric    | Holiday Clearance  | 123991234          | Select an Action |
| Sports Clearance          | Hype Sports           | Hype Sports Sale   | 123991234          | Select an Action |
| Decor Holiday Offer       | Décor Company         | Holiday Décor Sale | 123991234          | Select an Action |

Figure 18: Campaign from Template

#### 5.3. Managing Templates

Select the "Templates" folder (within the "Campaigns" tab) to view, use, or delete campaign templates. To create a campaign from an existing template, select the "Actions" drop-down menu and click "Create Campaign from Template."

Follow the steps beginning in Section 3 to continue building your campaign. Users can also delete templates by selecting the "Actions" drop-down menu and clicking "Delete Campaign."

Clicking on any templated campaign information in the listing (i.e., "Brand Display Name," "Campaign Title," etc.) will direct the user to a page displaying that specific campaign's information.

#### 6. Uploading Media

The "Media" link at the top of the page enables users to upload Representative and Ride-along

Images to their personal Media Library within the MCP (Figure 19). Users can also delete images stored from previous campaigns that are no longer needed. Up to 10 images can be stored in your Media library.

- Select the drop-down menu that reads "Media Type."
- Choose the appropriate media type (e.g., Representative Image or Ride-along Image).
- Select "Upload Media."

| PS.COM <sup>*</sup> Informed Delivery*  | Compainer | Media | Wirks            | mony N |  |
|---|-----------|-------|------------------|--------|--|
| <br>SCOM Interned Delivery  | Campaigns | Media | HOW II WORKS     |        |  |
| ) Media   |           |       | Upload New Media |        |  |
| Manage your media files that can be used in your next Informed Deliverylli campaign.<br>You have 6 out of 10 media files remaining. |           |       |                  |        |  |
| Modis Type 🗸  | ~         |       | Delote Modia     |        |  |
|   |           |       | FRIENDS & FAMILY |        |  |
|   |           |       | 20% OFF          |        |  |

Figure 19: "Media" Tab

#### 7. Legal Terms

#### INFORMED DELIVERY® INTERACTIVE CAMPAIGNS: MAILER/SUBMITTER TERMS AND CONDITIONS OF USE AGREEMENT (August 2021)

This Terms of Use Agreement (this "Agreement") is a legal agreement between You and the United States Postal Service, an Independent Establishment of the Executive Branch of the United States Government ("USPS" or "Postal Service"). Informed Delivery interactive campaigns (used herein as "Campaigns") are at this time a free enhancement available to Mailers to the Informed Delivery notifications USPS provides to participating consumers for no additional postage fees. "Mailer(s)," "You" and "Your", as used herein, include the Mail Owner/Brand, *and* any Mail Service Provider and any Advertising Agency acting on behalf of a Mail Owner/Brand in connection with the creation and submission of Content for an Informed Delivery Campaign.

Mailers agreeing to these Terms and Conditions, and complying with other requirements and specifications as may be published by USPS in *PostalOne!*, the Mailer Campaign Portal, the Shipper Campaign Portal in the *Informed Delivery Interactive Campaign Guide* available at <u>https://www.usps.com/business/informed-delivery.htm</u>, or elsewhere on that site, may submit supplemental content ("Content") to accompany or in some cases replace the grayscale scanned image that would otherwise be generated by USPS mail imaging processes (or, in the case of flats, replace the "image not available" notification) and provided to participating consumers as Informed Delivery notifications. In addition, Content may be submitted for display as a Campaign for packages being sent and tracked within the Informed Delivery interface. In addition, some end users of Informed Delivery may set reminders to review Your Campaign up to ten days following the first opportunity to view Your Content.

"Content" as used herein includes Ride-along Images, Representative Images, interactive links (URLs), and a Brand Display Name as text, or any other content that you provide to USPS by any means whatsoever (including but not limited to email, upload through *PostalOne!*, the Mailer Campaign Portal, the Shipper Campaign Portal through an API or otherwise).

By submitting Content to USPS in connection with any Informed Delivery Campaign, You agree to the terms and conditions specified below and to faithfully comply with all other rules, regulations, technical specifications and requirements for Informed Delivery Campaigns. The Postal Service reserves the right at any time to change or amend the Agreement, i.e., these terms, conditions, and notices under which this feature is offered. You may review the most current terms and conditions of use at <a href="https://www.usps.com/business/informed-delivery.htm">https://www.usps.com/business/informed-delivery.htm</a>. If You do not agree to, or cannot comply with, the Agreement as amended, You must stop using the feature. You will be deemed to have accepted the Agreement as amended if You continue to use the feature for Campaigns. You acknowledge and agree that Your use of the feature, in each instance, is subject to any such changes and that Your use of the feature constitutes acceptance of such changed terms. You agree to review this Agreement from time to time to ensure compliance with these terms and conditions.

In addition, USPS is beta testing a new Informed Delivery feature in select markets that allows Mailers to provide digital offers and/or anonymized mail to customers You have not mailed to directly. For eligibility and requirements, see the Beta Test for USPS Informed Offers Powered by Informed Address below.

#### Eligibility

Informed Delivery Campaigns must be submitted to accompany a letter-size mailpiece, flatsize mailpiece, or package that meets all mailability requirements of the Domestic Mail Manual. USPS reserves the right to refuse an Informed Delivery Campaign from a Mailer competing with a Postal Service product, service, or feature, although grayscale images of such mailpieces will be provided to consumers as part of the ordinary Informed Delivery notifications.

#### **Representative Images**

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Representative Images are full color images submitted by the Mailer that can be displayed in lieu of the grayscale scanned image of a letter-sized mailpiece or in lieu of the "image not available" notification that would accompany a flat-size mailpiece (e.g., catalogs, magazines) in the USPS Informed Delivery daily digest email notifications, dashboard, or app. Representative Images must comply with the following requirements: (1) the Representative Image must be: (a) a reproduction of the address side of the mailpiece without an address showing, or (b) the non-address (obverse) side of the mailpiece; and (2) for flat-sized mailpieces required to be or that are mailed under covers or wrappers, the Representative Image must be an image of the Mailer's corporate logo. Representative Images must also comply with all technical requirements (e.g., format, file size, pixel width and height, etc.) and other specifications as disseminated by USPS.

#### **Ride-along Images and Interactive Links**

Ride-along Images are required for all Informed Delivery Campaigns. Ride-along Images are full color images that accompany either the Representative Image selected by the Mailer in accordance with the requirements above, or the grayscale image of the scanned mailpiece (or in the case of a package, the notification that the package will be arriving soon) in the USPS Informed Delivery email notifications or dashboard. Ride-along images must comply with the following requirements: (1) the Ride-along Image must directly relate to the promotion or offer contained in the mailpiece or what was shipped in the case of a package; (2) the Ride-along Image must be sized to the full space allowed or be reduced in size based on the ratio compared to the Representative Image; and (3) regardless of Mailer identity, the Ride-along Image language may not facilitate diversion from Postal Service products, services, or features (including "pay online" and similar CTAs).

URLs and interactive links submitted as part of the Content with Ride-along Images must comply with the following requirements: (1) all URLs and links submitted as Content for an Informed Delivery Campaign *must* be submitted as HTTPS; (2) all URLs and links submitted as part of an Informed Delivery Campaign must lead directly to a landing page directly associated with the physical mailpiece or package utilized in the Campaign, or Your website's homepage; (3) all URLs and links *must* be free of any malware, viruses, errors, or other aspects that could negatively impact the Informed Delivery feature and/or consumer experience with the feature; (4) You *must* monitor the Campaign and any threats, vulnerabilities, malware and malformed links must be addressed and reported to USPS within twenty-four (24) hours of discovery; and (5) any web site being linked to from an Informed Delivery campaign and/or USPS.com shall be branded in a manner or have a look and feel ("trade dress") that will not emulate USPS.com or create a likelihood of confusion with USPS trade dress or otherwise lead consumers to believe or confuse consumers that they are on a USPS site. To comport with USPS policies related to exit pages, and with the goal of not having an exit page, You acknowledge, understand and agree that the standard for no exit page as set forth by Postal Service Management is that the site being linked to needs to be substantially different from USPS sites (i.e., the site's appearance must be one that a person is unlikely to confuse with USPS sites or properties, or to think is a part of the USPS websites or properties, and possesses a distinct look and feel from those of USPS sites or properties, and the site must have a distinct URL separate and apart from the URLs of USPS.com and not use any USPS marks).

When a user clicks on Informed Delivery campaign content, Informed Delivery will pass click-through data to the mailer in the form of URL parameters.

Informed Delivery will append the campaign Mailer ID (MID) and Serial Number to the end of the mailer-provided campaign Target URL as parameters for all interactive campaigns.

If the campaign URL is a redirect, the end destination URL must be entered as the Target URL for the interactive campaign.

#### Your Representations and Warranties

You represent and warrant that You have all necessary rights, including third party rights, and hereby grant to USPS such rights to use, display, publish, transmit, distribute, and make copies of the Content, and otherwise use it in Your Informed Delivery campaign, without infringing any rights of any third party or violating any applicable laws, rules, or regulations. The rights referred to in the foregoing include, without limitation, copyrights, trademark

rights, rights of publicity (name and likeness rights) and any other rights necessary to use the Content. You further represent and warrant that the nature, appearance, and display of the Content is consistent with the mailability requirements of the Domestic Mail Manual.

You acknowledge and agree that USPS will not be involved in any way with the design of the Content, and represent and warrant that the Content as submitted to USPS or uploaded through USPS portals or through an API complies with these Terms and Conditions and any requirements published by USPS on PostalOne!, the Mailer Campaign Portal, the Shipper Campaign Portal or the Interactive Campaign Guide (available at https://www.usps.com/business/informed-delivery.htm), or elsewhere on that site. You agree to evaluate and bear all risks associated with the use of any Content and agree that You are solely responsible for and assume all liability arising from use of the Content in or through or otherwise as a result of Your Informed Delivery campaign. You represent and warrant that the Content does not claim or create the impression, whether expressly or by implication, that the Postal Service endorses You or Your product, service or offering, and that the Content does not contain unlawful or legally actionable material, such as Content that is fraudulent or misleading, is defamatory or obscene, or violates anyone else's rights, including copyright, trademark, or privacy or publicity rights. You agree that the fact that USPS reproduces, displays, or distributes the Content and/or otherwise uses it in the Informed Delivery campaign: (1) does not constitute approval or endorsement of the Content; (2) does not indicate that the Content complies with any or all applicable laws, including Postal law or regulations, or (3) does not constitute acceptance of any liability or risk arising from the Content. For any interactive link contained in the Content, in addition to representations and warranties above, You warrant and represent that any web page linked to directly from Informed Delivery, whether through an email notification, dashboard or mobile app, shall not take Informed Delivery users to a web page that could be confused by a reasonable person to be a Postal Service web page.

You acknowledge and agree that any Content submitted may be shared by end-users of Informed Delivery through social media sites. Accordingly, You acknowledge, agree, represent and warrant that any Content submitted shall not be in contravention of the policies of the various social media sites' policies or terms of use.

#### Indemnity

You agree to indemnify and hold the Postal Service and its Governors, officers, employees, agents, printers, contractors, vendors, and suppliers harmless against any and all expenses and losses of any kind (including attorneys' fees and costs) incurred in connection with any claims of any kind arising out of breach of any of the above representations and warranties, and publication, transmission, display or distribution of the Content (including, without limitation, any claim of patent, trademark, or copyright infringement, libel, defamation, breach of confidentiality, misappropriation of trade secret, invasion of the rights of privacy or publicity (including the right to control use of one's name and likeness), or false or deceptive advertising or sales practices) or any material or products of Yours to which third parties can link through the Content.

#### **Rejection/Cancellation of Campaigns**

USPS reserves the right to reject or cancel any Informed Delivery Campaign at any time for any reason satisfactory to USPS in its sole and non-reviewable discretion, including but not limited to the following: (1) violations of or noncompliance with any of these Terms and Conditions, or requirements published via *PostalOne!*, the Mailer Campaign Portal, the Shipper Campaign Portal or in the *Interactive Campaign Guide*, or on <u>https://www.usps.com/business/informed-delivery.htm</u>; (2) detection of potential threats, vulnerabilities, malware or malformed links, security or privacy concerns, or potential degradation of USPS or consumer systems or equipment; (3) Campaign interactive links that are broken or that resolve to pages that negatively impact the Informed Delivery user experience; or (4) potentially subject USPS to liability or risk damage to the Informed Delivery feature and goodwill associated therewith.

#### Disclaimer

THE PRODUCTS, SERVICES, WEBSITE, CONTENT AND/OR MATERIALS AVAILABLE THROUGH USPS ARE PROVIDED ON AN "AS IS" AND "AS AVAILABLE" BASIS AND WITHOUT WARRANTIES OF ANY KIND,

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#### Limitation of Liability

IN NO EVENT SHALL USPS BE LIABLE FOR ANY INDIRECT, INCIDENTAL, CONSEQUENTIAL, SPECIAL OR EXEMPLARY DAMAGES, EVEN IF SUCH DAMAGES ARE FORSEEABLE, AND REGARDLESS OF WHETHER USPS HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. YOUR SOLE AND EXCLUSIVE REMEDY FOR ANY CLAIM ARISING FROM OR RELATING TO YOUR PARTICIPATION IN AN INFORMED DELIVERY CAMPAIGN SHALL BE LIMITED TO A MAKE-GOOD PLACEMENT OF THE CONTENT AT A LATER TIME IN CONNECTION WITH A SUBSEQUENT MAILING.

#### Governing Law

Any and all disputes involving these Terms and Conditions or arising from the submission, rejection or cancellation of an Informed Delivery Campaign shall be governed by federal law, with jurisdiction and venue exclusively in the United States District Court for the District of Columbia or the United States Court of Federal Claims, as appropriate.

Updated: 08/24/2021

#### Appendix A – Resolving Address Validation Issue

When a first-time user clicks on the "Request Access" or "Go To Service" link, the BCG informs the user it will redirect him/her to the landing page (Figure 20). The MCP requires an Address Validation prior to accessing the Portal. The Postal Service is currently working to resolve this defect.

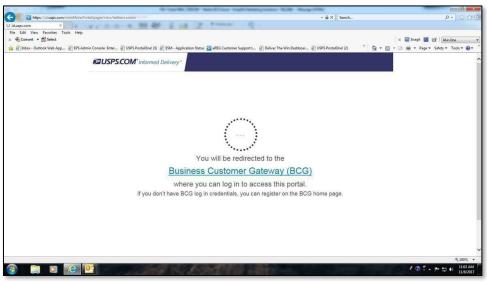


Figure 20: BCG – Portal Access Defect Due to Address Validation Check

Until USPS resolves this defect, users can attempt to address this issue with any of the solutions below:

- 1. Follow the steps outlined below to ensure the account contains a valid USPS approved mailing address. For instance, users oftentimes fail to include a Suite or Unit number or place that information in the wrong location. Access to the MCP will be granted once the address is recognized and verified.
  - Go to <u>usps.com</u> and select ZIP Code Lookup under Quick Tools (Figure 21).
  - Enter just the Address and City/State from your BCG account and conduct the search—do not enter your ZIP Code (Figure 21).
    - Be sure to enter the address just like it is shown in your account (on Address Line 1, Address Line 2, etc.)
  - The response provided will indicate if the address is valid or if there are multiple addresses available (First red highlighted box in Figure 21).
    - The most common issue is that a Suite or Unit number is missing, as shown in the example below (Second red highlighted box in the image below).
    - Alternately, the Suite or Unit number may be on the wrong Address line.
  - Update your address in your BCG account to include the full, valid address.
    - Click on Edit Profile, choose My Company is Moving, make the change to your address, click on Continue and Confirm. Then log out of BCG. You should see the change when you log back in.
- 2. Conduct programming to submit campaigns via *PostalOne!* (Reference the *Interactive Campaign Guide* on the <u>Informed Delivery for Business Mailers & Shippers</u> website for more information).
- 3. Wait until the observation is fixed to conduct a campaign in the MCP.

| P Code™ By Address  | Cities by ZIP Code <sup>TM</sup>  |                                  |
|---|---|----------------------------------|
| You entered:  |   | Look up another ZIP Code**       |
| 2005 NEWPOINT PKWY  |   | Edit and Search Again >          |
| LAWRENCEVILLE GA  |   |                                  |
| Several addresses matched<br>building has multiple units. | d the information you provided. Perhaps you did   | and enter a street number or the |
|   |   | 1 - 3 of 3                       |
| 2005 NEWPOINT PKW<br>LAWRENCEVILLE GA                     |   |                                  |
| Show Mailing Industry I                                   | Details 😋   |                                  |
| 2005 NEWPOINT PKW<br>LAWRENCEVILLE GA                     | VY STE (EVEN Range 100 - 200)<br>30043-5593   |                                  |
| Show Mailing Industry (                                   | Details 😋   |                                  |
|   | 99) NEWPOINT PKWY<br>30043-5538   |                                  |
| (ODD Range 2001 - 20<br>LAWRENCEVILLE GA                  |   |                                  |
|   | and the second se |                                  |

Figure 21: Address Entry Page on usps.com

#### Appendix B - Business Customer Gateway (BCG) Access Management

For multiple individuals to share access to campaign information in the MCP, two requirements must be met:

- 1. The BCG must associate the users with the same company through the same CRID.
- 2. New users must be approved by the Business Service Administrator (BSA). The first person to create an account with a CRID becomes the organization's BSA.

USPS recommends following the three steps below to ensure that multiple individuals can view relevant campaign information.

- Search for an organization by CRID: If a user creates an account and selects a name or address for a company that does not perfectly match an already existing account, a new CRID is created. USPS recommends avoiding this pitfall by searching for a company by its CRID—not the Name/Address option.
- 2. Ensure the BSA approves each user: The BSA receives a notification when a new user requests access and must approve that individual. USPS recommends that new users contact their organization's BSA to confirm their access request will be approved.
- 3. **Check the "Home Location":** The "Home Location" reflects the individual's first CRID used in BCG. The CRID must perfectly match the BSA's CRID. At this time, individuals cannot change their "Home Location." If the CRID is incorrect, USPS recommends creating a new account with the correct CRID

Use the BCG "Help" link for more information on how to assign rights within BCG.