

United States Postal Service[®]
Technical Specification

Informed Delivery[®]
Mailer Onboarding Guide
for Submitting eDoc Campaigns
via *PostalOne!*[®]

Version 4.0

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1 Preface

This comprehensive technical specification outlines the steps and criteria for submitting Informed Delivery (ID) interactive campaigns via *PostalOne!* Electronic Documentation (eDocs).

This document has been prepared for commercial mailers, marketers, or Information Technology (IT) staff members who use mailing data to prepare or produce commercial mailings via *PostalOne!* Readers should already be familiar with the *PostalOne!* system, Mail.dat data communication options, and the DTAC Mail.dat[®] and Mail.XML[®] specifications. Please reference the **USPS[®] Technical Specifications for Mail.dat and Mail.xml** and the **DTAC Mail.dat resources** for more information about the *PostalOne!* environment.

USPS owns the following trademarks: Informed Delivery, Intelligent Mail[®], IM[®], IMb[®], *PostalOne!*, Postal Service[™], The Postal Service[®], USPS Marketing Mail[®], United States Postal Service[®], USPS[®], and ZIP Code[™].

The Delivery Technology Advocacy Council (DTAC) owns the following trademarks: Mail.XML and Mail.dat.

Email the USPS Informed Delivery eDoc Support Team at USPSInformedDeliveryeDoc@usps.gov with any questions or comments related to this guide.

1.1 Standard Operating Procedure – Onboarding

Step 1 – Support Contact Information

Informed Delivery Support Teams and Roles

Two USPS teams support ID. Application support roles for ID are outlined below.

ID eDoc - USPS Informed Delivery eDoc Team

The ID eDoc team responds to all eDoc *PostalOne!* Mail.dat & Mail.XML questions, including onboarding, testing, and production support. It also assists with issues around claiming the ID Promotion through PO!

IDPO - USPS Informed Delivery Program Office

The IDPO handles all general Informed Delivery and ID Mailer Campaign Portal related questions, including all general campaign questions related to supplemental content specifications and reporting.

Contact Email
USPSInformedDeliveryeDoc@usps.gov
USPSInformedDeliveryCampaigns@usps.gov

Step 2 – Reference Materials

Review Reference Materials

Before conducting a *PostalOne!* Campaign, please review the materials on the [Informed Delivery for Business Mailers](#) website and the [Informed Delivery](#) page on PostalPro. Mailers can then direct technical and onboarding support questions regarding Mail.dat/Mail.XML to the Informed Delivery eDoc Team via the email provided above.

Informed Delivery Business Mailer Webpage

PostalOne! Technical Specifications

PostalOne! Informed Delivery Technical Specifications

DTAC Mail.dat Technical Specifications

DTAC Mail.XML Technical Specifications

Resource Location
https://www.usps.com/business/informed-delivery.htm
https://postalpro.usps.gov/mailing/techspecs
https://postalpro.usps.gov/mailings/idedocspeccs
https://www.delivery-tech.org/mail-dat
https://www.delivery-tech.org/mail-xml

Step 3 – Send Email to USPS Informed Delivery eDoc Team

Email the Informed Delivery eDoc Team at USPSInformedDeliveryeDoc@usps.gov stating your intent to start testing Informed Delivery Campaigns using *PostalOne!* Please provide the following information:

- Point of contact name
- Phone number

6. Email the Informed Delivery eDoc Team with the following information:

- CRID:
- MID:
- Company Name:
- Address:
- Point of Contact:

7. Create your test permit account.

For directions of this process, see [Section 2.2 – SOP for Creating a CAT Permit](#).

8. Send your permit information to USPSInformedDeliveryeDoc@usps.gov. Include the following information:

- Permit #
- Permit Type
- Permit Address (Including ZIP Code™)

9. The USPS Informed Delivery eDoc Team will fund and pay the fees associated with the test permit and email you when the account is ready for testing.

10. The CRID, MID, and Permit Account Number information can now be used to prepare and submit Mail.dat or Mail.XML jobs with Informed Delivery campaigns to *PostalOne!* CAT.

11. The *PostalOne!* CAT MDR client can be downloaded from the CAT BCG website (***Other Services: PostalOne! eDoc Submission***).

12. Contact the Informed Delivery eDoc Team after submitting test jobs. They will validate the eDoc data and provide feedback if there are any errors.

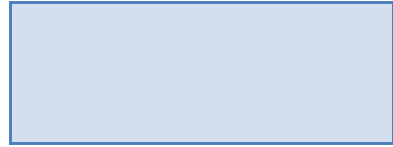
Step 6 – Use existing *PostalOne!* CAT Account

If your organization has participated in *PostalOne!* CAT testing before, please acquire your organization's *PostalOne!* CAT credentials and note them below. If the credentials are not accessible (the responsible party no longer works at your company or password is not known), contact MSSC@usps.gov for assistance.

- Username
- Password
- Customer Registration ID (CRID)
- Mailer ID (MID)
- Permit Account Number
- ZIP Code™ related the Permit

Your Notes

NOTE: If you are not able to obtain the previously created account information, then a new one will need to be created. See **Section 2.1 – SOP for Creating a CAT BCG Account**.

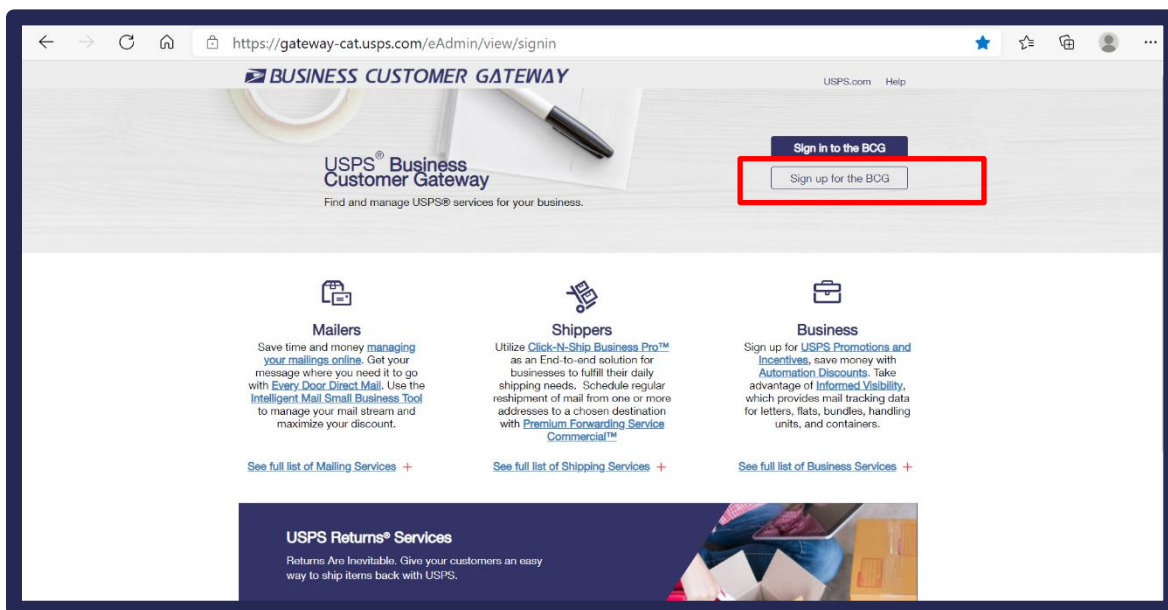


2 Creating a CAT BCG Account and Permit for Testing

2.1 SOP for Creating a CAT BCG Account

Step 1. Go to <https://gateway-cat.usps.com/eAdmin/view/signin>

Step 2. Click the **Sign Up for the BCG** button.



Step 3. Select a username to enter in the **Pick a Username** box. Enter your Password and fill out the security question information.

Create Your USPS.com Business Account

Step 1: Pick a username

Please enter a username which will uniquely identify you with the United States Postal Service.

* indicates a required field

* Username

Step 2: Enter your security information

Please create a password for your account. We highly recommend you create a unique password - one that you don't use for other websites.

* indicates a required field

Pick a Password

* Password

* Re-Type Password

Passwords must be at least 8 characters in length and include at least one uppercase letter, one lowercase letter, and one number. They are case-sensitive and cannot include your username or more than two consecutive identical characters.

Pick Two Security Questions

* First Security Question

* Second Security Question

Please answer two secret questions. Answers are not case-sensitive. If you forget your password, you will be asked for this information to re-gain access to our site.

[Feedback](#)

Step 4. Enter contact information for the account.

Step 3: Enter your contact information

Please review and edit your contact information for your USPS account

* indicates a required field

Name

Title

* First Name

M.I.

* Last Name

Suffix

Email & Phone

* Email Address

* Re-Type Email Address

* Type * Phone Ext.

Mobile (U.S. Only)

Can we contact you?
 Get communications from USPS and our partners.

From USPS
 From USPS Partners

Step 4: Find address by...

Please enter the address so USPS can find the best deliverable option for you.

Step 5: Find by address

Please choose how you would like to find your address

Address ZipCode™ Company Identifier

Enter your address

[Feedback](#)

Step 5. Enter address Information for the account, then click **Verify Address** button.

Step 5: Find by address

Fill out all the required fields and validate your address so it can be verified as a valid delivery address.

* indicates a required field

Enter your address

* Country
UNITED STATES

* Company Name
USPS

* Street Address
900 Brentwood Rd NE

Apt/Suite/Other

* City
Washington

* State
DC - District of Columbia

ZIP Code™
20066

Verify Address

Step 6. Choose one of the valid mailing addresses on the right under **Possible Addresses** by clicking the radio button next to the address and clicking **Continue**.

Step 5: Find by address

Fill out all the required fields and validate your address so it can be verified as a valid delivery address.

* indicates a required field

Please choose a valid mailing location

The address you provided corresponds to a number of more specific addresses, some of which may have different ZIP+4 Codes. Please choose a more specific address from the list provided below.

Original Address:

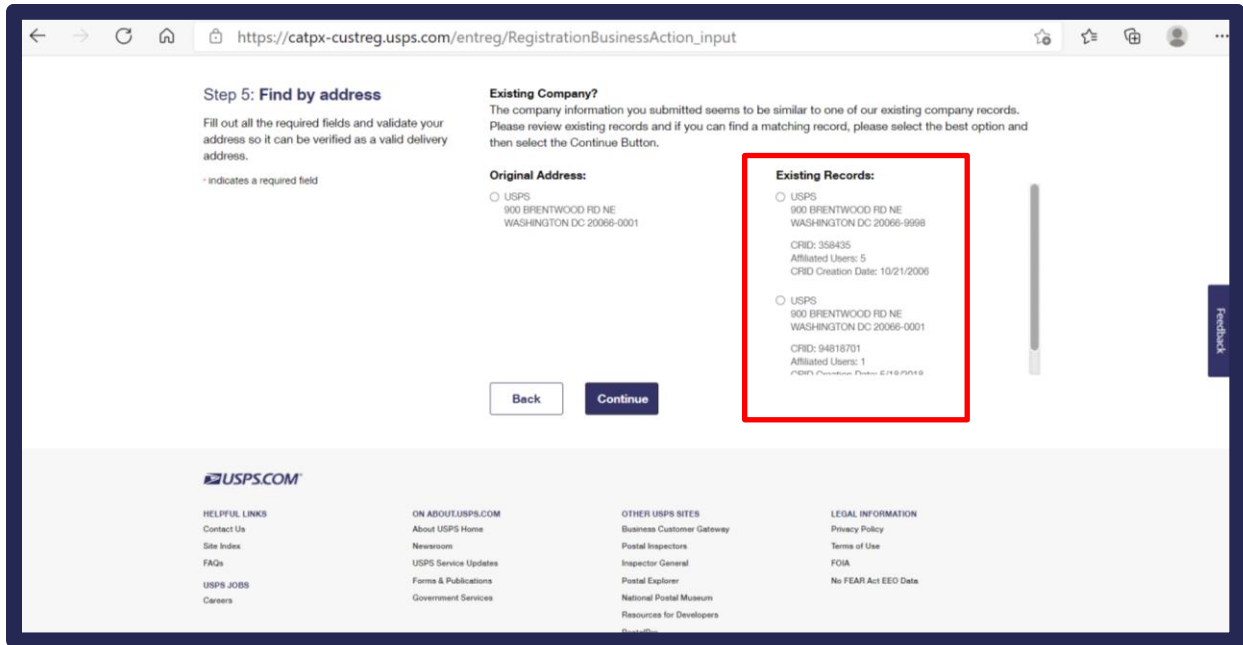
900 Brentwood Rd NE
Washington DC 20066

Possible Addresses:

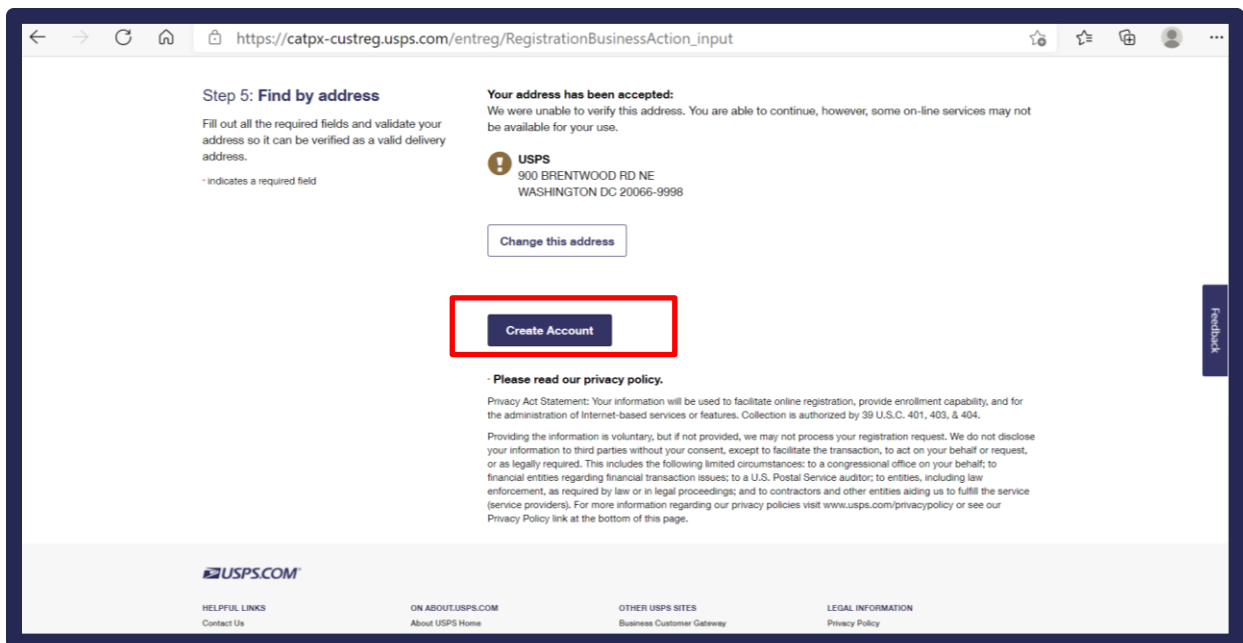
- 900 BRENTWOOD RD NE
WASHINGTON DC 20066-0001
- 900 BRENTWOOD RD NE
WASHINGTON DC 20066-0002
- 900 BRENTWOOD RD NE
WASHINGTON DC 20066-0004
- 900 BRENTWOOD RD NE
WASHINGTON DC 20066-0005
- 900 BRENTWOOD RD NE

Back **Continue**

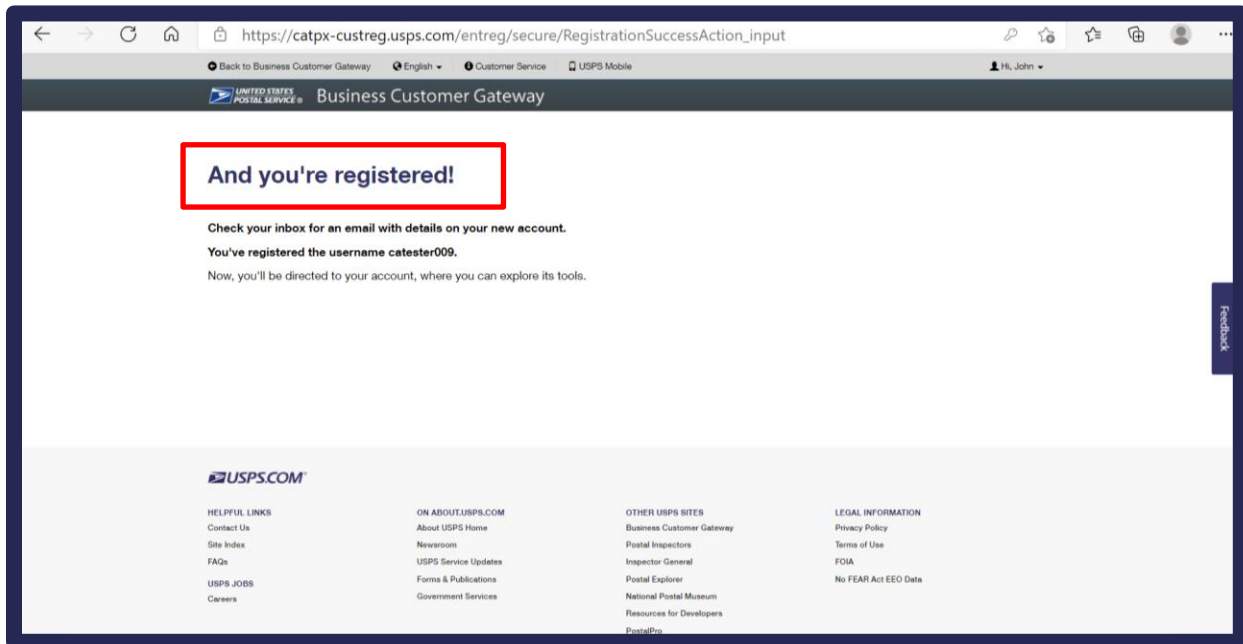
Step 7. Choose an existing record **ONLY** if it matches the original address you entered by clicking on the radio button to the left of the address under **Existing Records**. If none of them match, click the radio button next to Original Address. Click **Continue**.



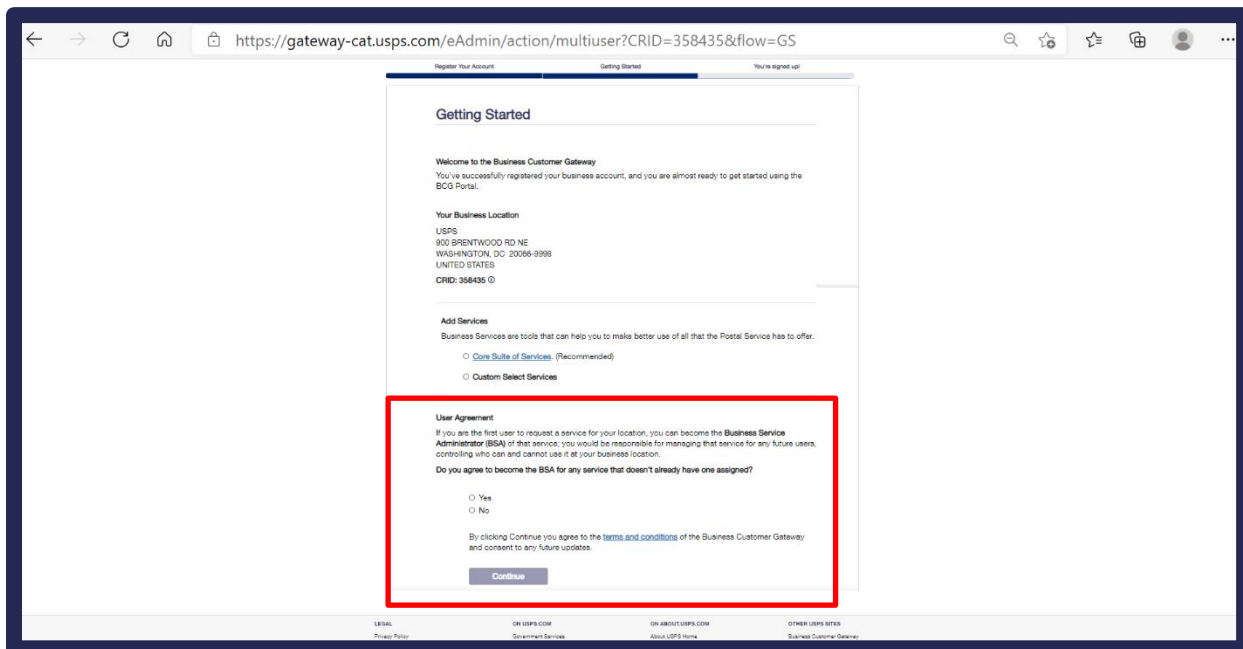
Step 8. Review the privacy policy and acknowledge it by clicking **Create Account**.



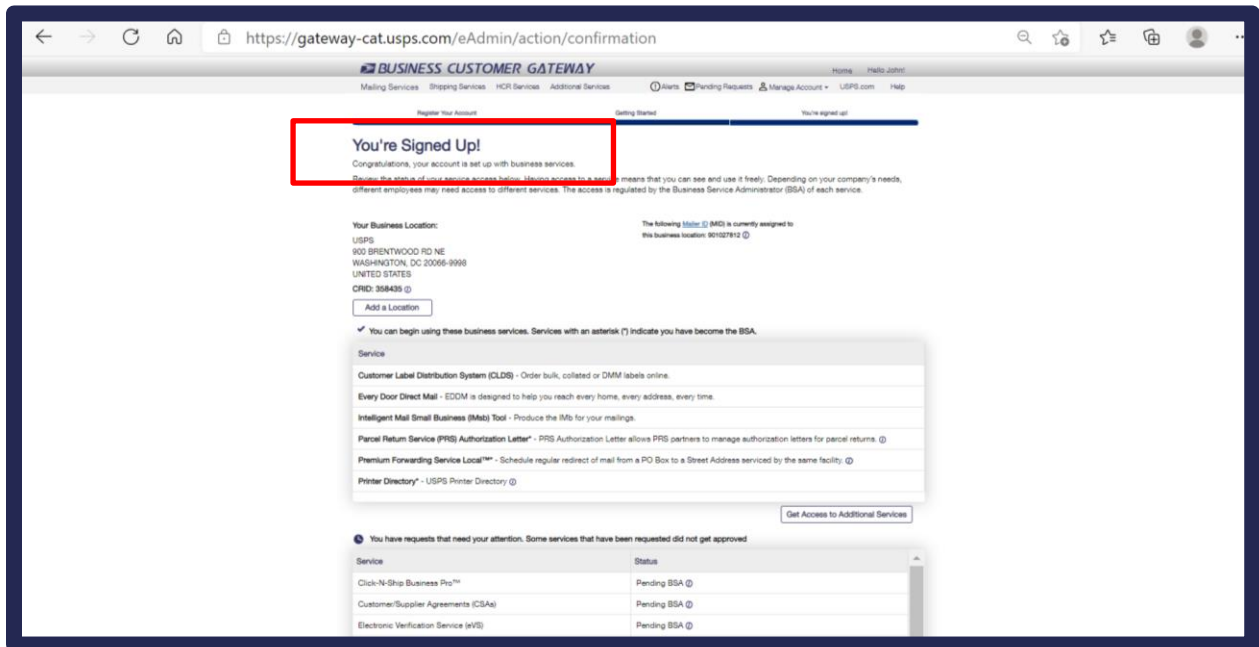
Step 9. If account creation is successful, the screen will display **“And you’re registered!”** Wait for the page to be redirected. This will take a few seconds.



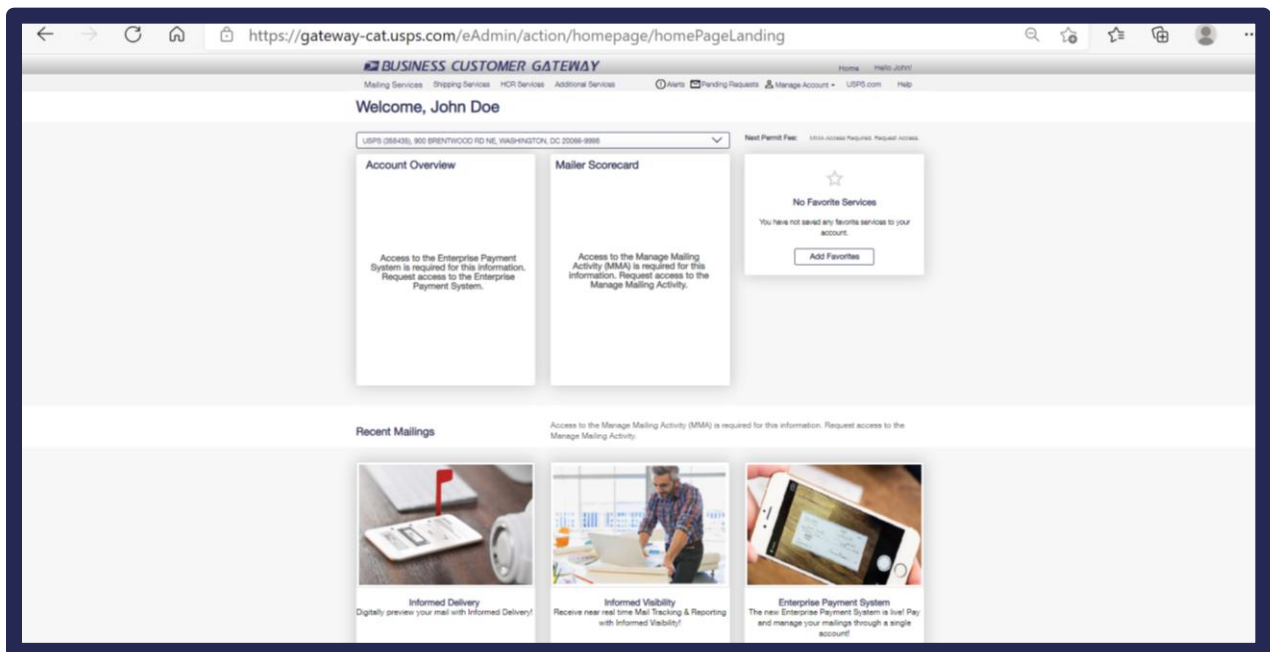
Step 10. You will be redirected to the below screen to verify your account information. Review your account information and the *Terms and Conditions* carefully. If you are asked to agree to become the BSA for any services that do not have one assigned, make sure you select **Yes**. Click the **Continue** button.



Step 11. You will be brought the final page “*You’re signed up!*” Make note of your new CRID and MID, then click **Continue** at the bottom of the screen.



Step 12. You will then be brought to the main CAT BCG page.



You are now all set up with your BCG account!

2.1.1 BSA Information

If you select **No** to the question agreeing to be the BSA for any services that do not already have a BSA, your request will be pending until the BSA approves it. If no BSA is assigned, the request will never be approved. If available, you should always select **Yes** in case a BSA has not yet been assigned.

User Agreement

If you are the first user to request a service for your location, you can become the **Business Service Administrator (BSA)** of that service; you would be responsible for managing that service for any future users, controlling who can and cannot use it at your business location.

Do you **agree to become the BSA for any service** that doesn't already have one assigned?

Yes

No

By clicking Continue you agree to the [terms and conditions](#) of the Business Customer Gateway and consent to any future updates.

[Continue](#)

If a **BSA** is already assigned, you can find out who the BSA is by navigating to **Manage Account – Manage Services**, under **Manage Mailing Activity**. Click on **Not You** next to **Manage Mailing Activity** to see the name of the assigned BSA.

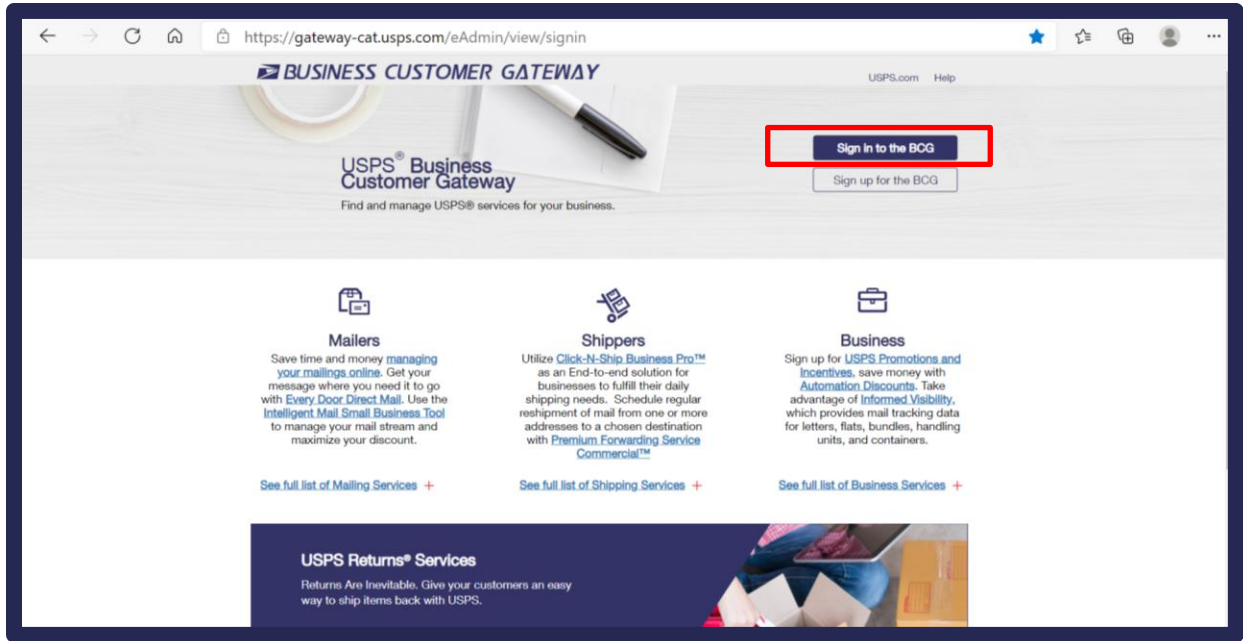
Service	Status	BSA
Manage Mailing Activity	Pending BSA	Not You

[Cancel](#)

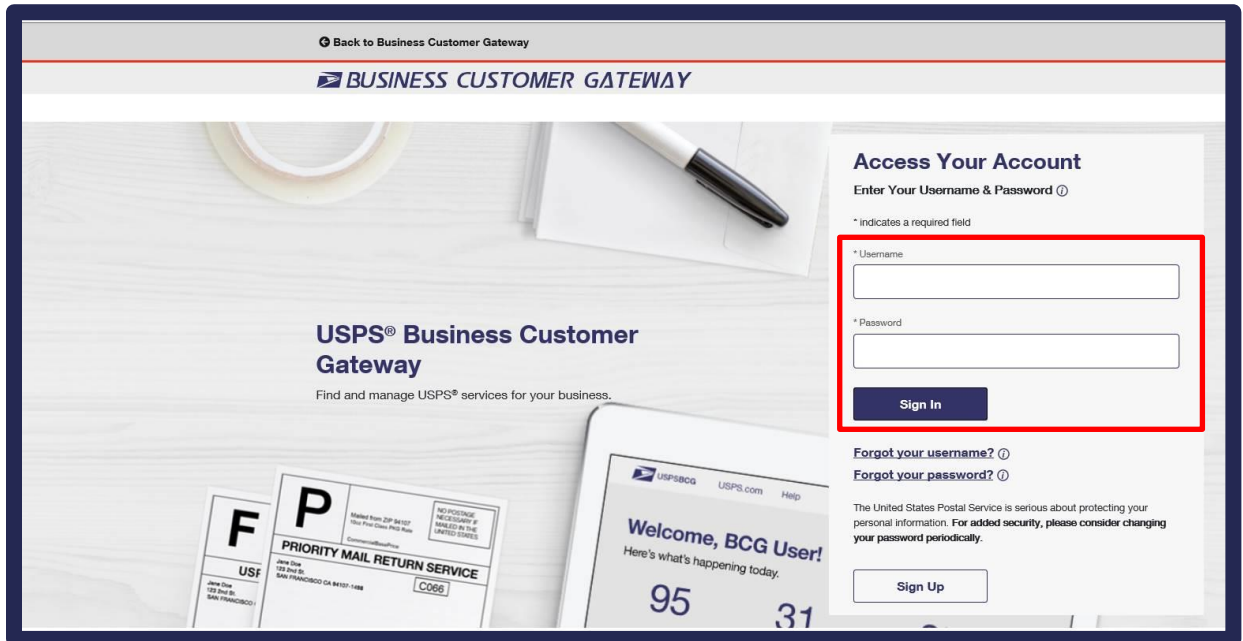
2.2 SOP for Creating a CAT Permit in BCG

Step 1. Go to <https://gateway-cat.usps.com/eAdmin/view/signin>

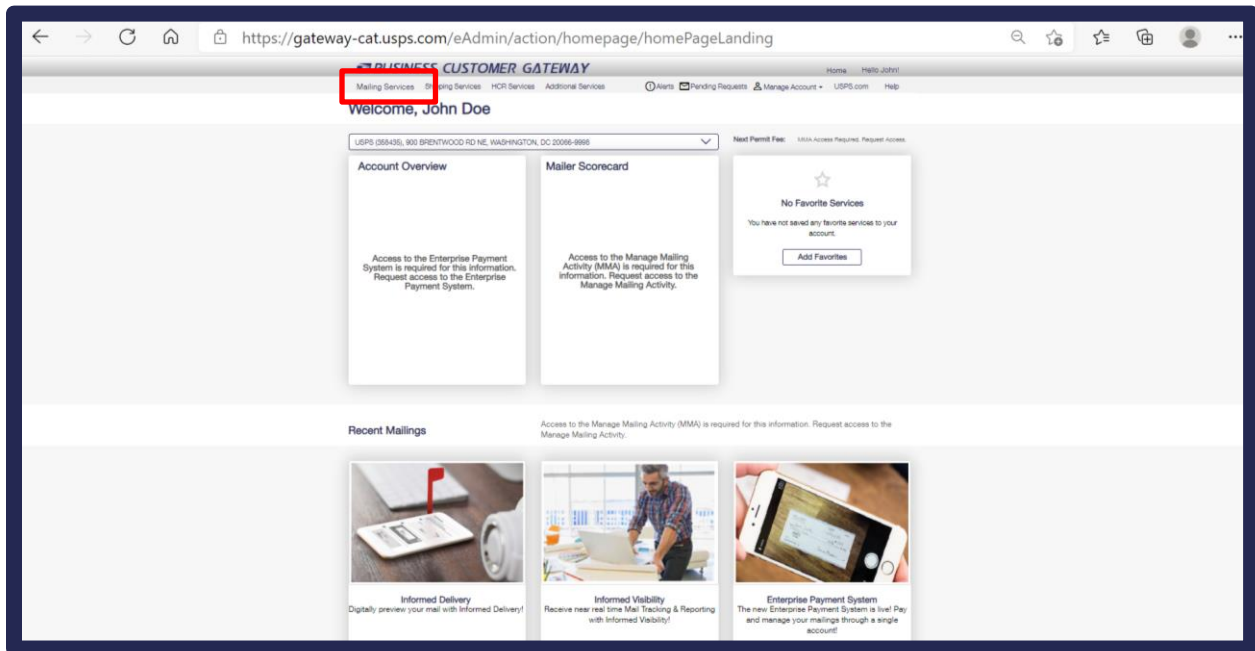
Step 2. Click on the **Sign in to the BCG** button.



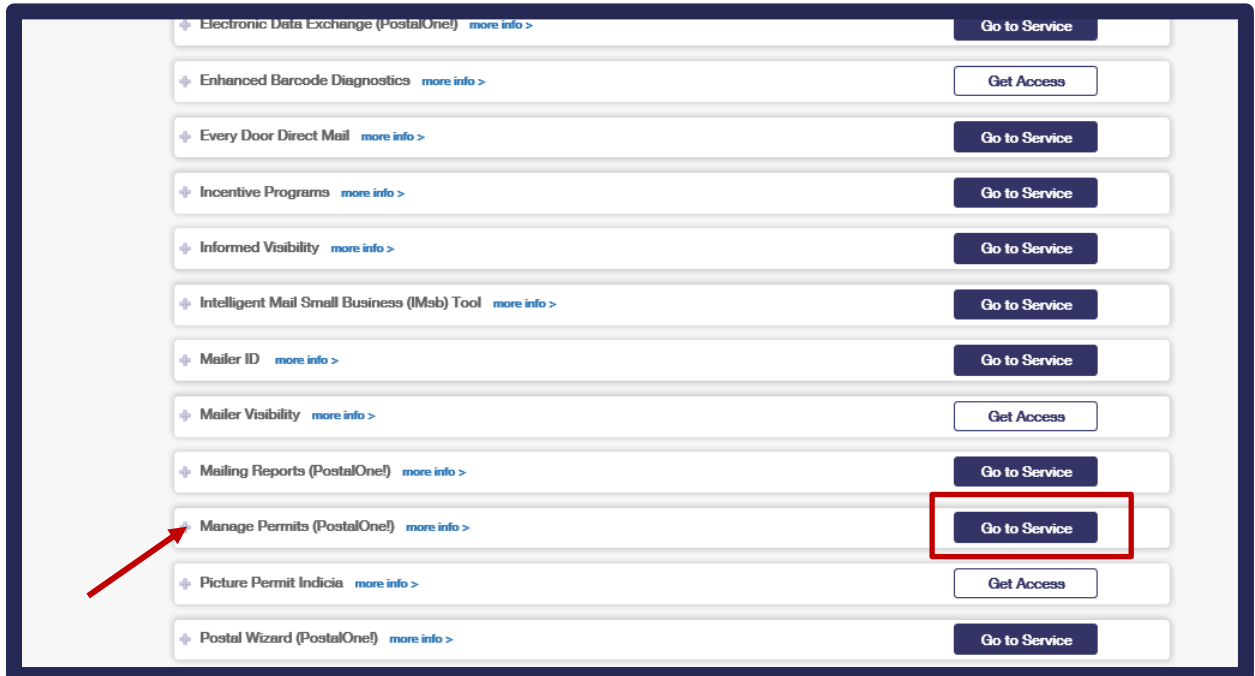
Step 3. Enter the username and password for the CAT BCG credentials you just set up in the previous section (or existing credentials that you may have access to for CAT BCG).



Step 4. Click on **Mailing Services from the top menu bar.**



Step 5. Select **GO TO SERVICES from the **Manage Permits (PostalOne!)** option. (This will be a green **GO TO SERVICES** button, but it may be pending approval if you are not the BSA for your organization. Contact PostalOne@usps.gov for assistance if you cannot access this service.)**



Step 6. You will be brought to a page that lists all associated business locations for your account (see below). Click on the name of the location you would like to create a permit for listed under **Associated Business Locations**.

The screenshot shows the 'Associated Business Locations' page. The table below lists various business locations. A red box highlights the 'Name' column, and a red arrow points to the 'Automated Mailing Systems' entry.

Name	CRID	Address	City	State/Province	ZIP/Postal Code	Country
AUTOMATED MAILING SYSTEMS	4430796	475 LENFANT PLZ SW STE 3	WASHINGTON	DC	20260-0004	UNITED STATES
Mailing Company D	94539997	555 Test Street	Reading	PA	19540	UNITED STATES
CAAJUN'S HOUSE OF WINGS	94611112	808 9TH ST SE	ROANOKE	VA	24013	UNITED STATES
PIZZA AND PETS - AURORA	94612161	22247 E CALHOUN PL	AURORA	CO	80016-2362	UNITED STATES
PIZZA AND PETS - TUCSON	94612162	9150 N SHADOW MOUNTAIN DR	TUCSON	AZ	85704-6742	UNITED STATES
PIZZA AND PETS - EFFINGHAM	94612172	1104 S WILLOW ST	EFFINGHAM	IL	62401-4043	UNITED STATES
PRODING CATS	94645784	875 10TH ST NW APT 201	WASHINGTON	DC	20001-5158	UNITED STATES
BHOOT	94771545	230 W 200 S	SALT LAKE CITY	UT	84101-1337	UNITED STATES
PIZZA AND PETS	94791787	410 N SILVER ST	OLNEY	IL	62450-3648	UNITED STATES
Virtual Services by Tracy	94797925	100 S REYNOLDS ST APT 701	ALEXANDRIA	VA	22304-3176	UNITED STATES
SKYLINE	94800461	23 W 200 S	SALT LAKE CITY	UT	84101	UNITED STATES

Step 7. Select **Permit Creation**

The screenshot shows the 'Business Location Information' page for the 'SKYLINE' location. A red arrow points to the 'Permit Creation' tab in the navigation bar.

Business Location Information

View and manage business location profile information.

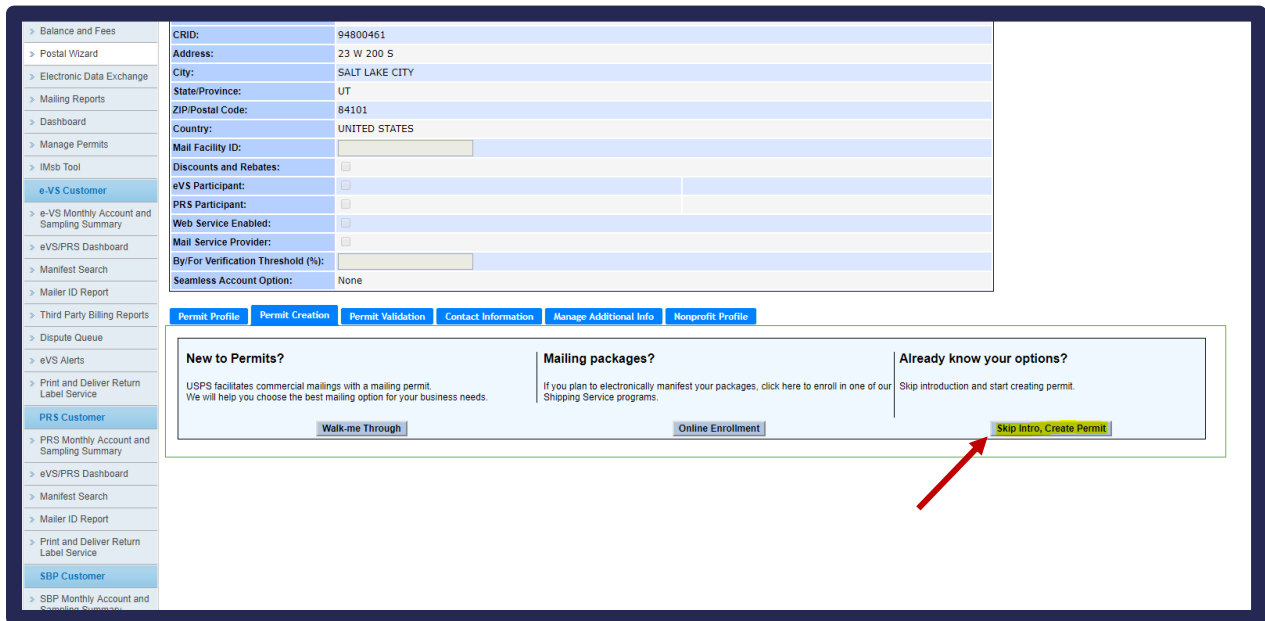
Name:	SKYLINE
CRID:	94800461
Address:	23 W 200 S
City:	SALT LAKE CITY
State/Province:	UT
ZIP/Postal Code:	84101
Country:	UNITED STATES
Mail Facility ID:	
Discounts and Rebates:	<input type="checkbox"/>
eVS Participant:	<input type="checkbox"/>
PRS Participant:	<input type="checkbox"/>
Web Service Enabled:	<input type="checkbox"/>
Mail Service Provider:	
By/For Verification Threshold (%):	
Seamless Account Option:	None

Permit Search Form

All the permits linked to the selected business location are displayed below the search form. Use the below search to find the specific permits within the displayed result set.

Permit No:	is	
Permit Type:		
Permit City:	is	
State:		

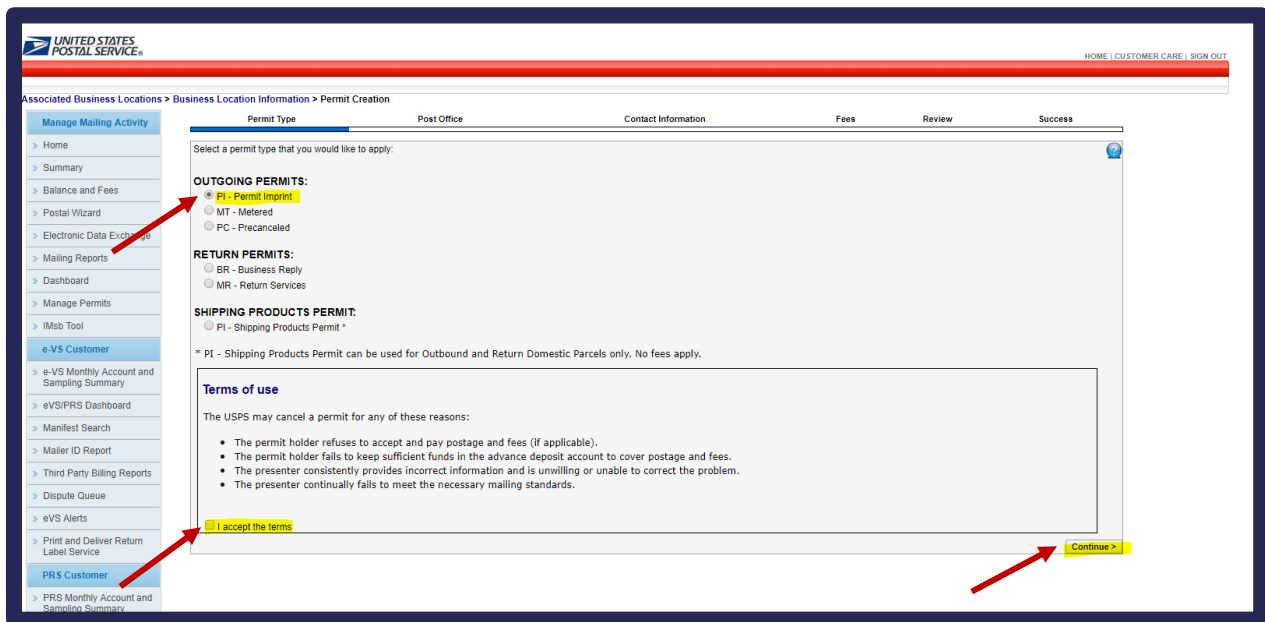
Step 8. Click *Skip Intro, Create Permit*



Step 9. Select a radio button for the desired permit type

Step 10. Click on *I accept the terms*

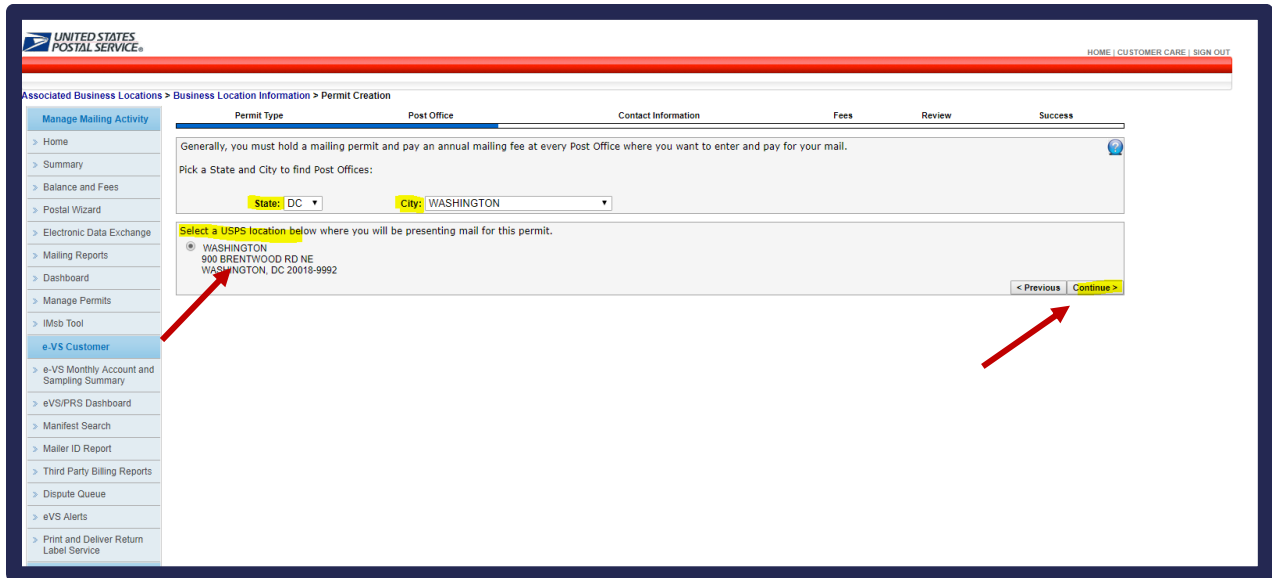
Step 11. Click *Continue*



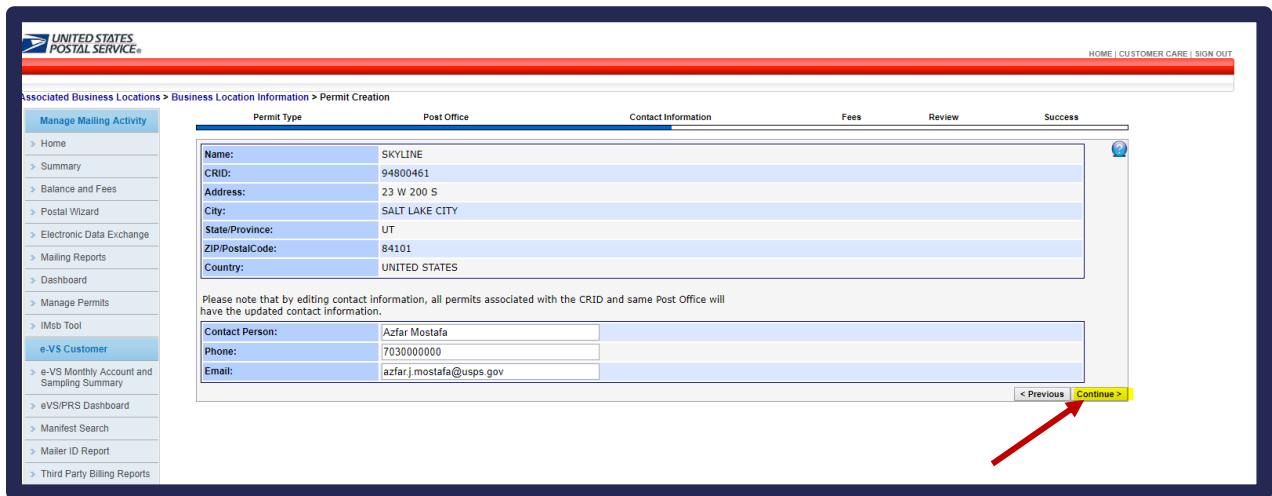
Step 12. Select a **State** and **City** from the dropdown menus

Step 13. Select the radio button for the USPS location for mail drop off

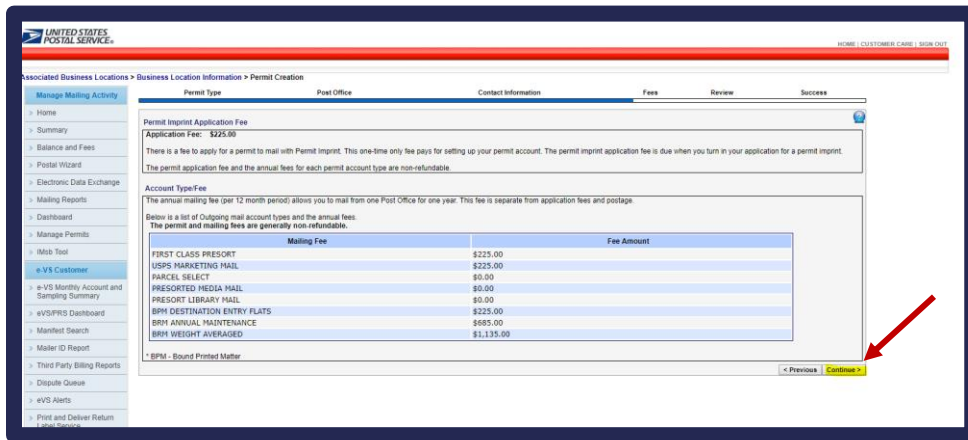
Step 14. Click **Continue**



Step 15. Click **Continue**

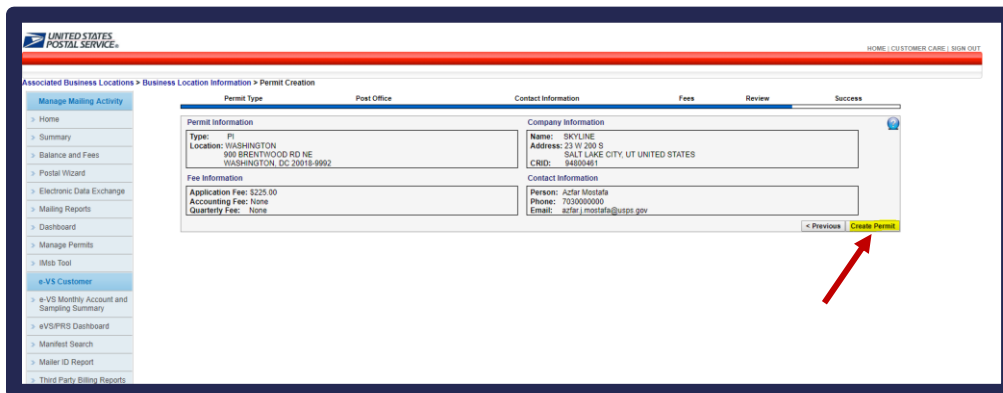


Step 16. Click *Continue*

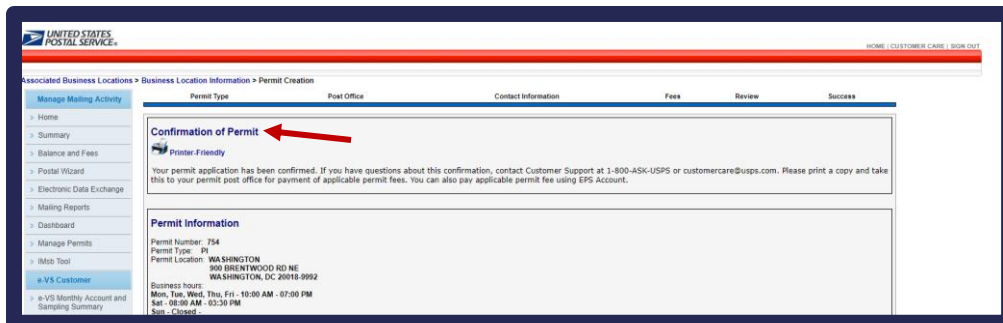


Note: Please disregard the information around the Application Fee. This is not applicable for CAT. Click continue to go to the next screen. The USPS PostalOne! eDoc Support Team will fund the account and pay these fees for you afterwards.

Step 17. Click *Create Permit*



Step 18. If permit is successfully created, the following **Confirmation of Permit** page will appear



NOTE: If you have problems creating your CAT BCG account or permit, please contact the Help Desk for assistance at MSSC@usps.gov.

3 Mailer Onboarding SOP for CAT Testing

Campaign Testing Scenarios

The following test scenarios are highly recommended for Mailers who are new to submitting campaign data via Mail.dat. These are recommendations and Mailers should determine which scenarios best reflect the types of jobs they will be submitting.

Mailer Information

Mailer Name	
Mailer Email Address	
Mailer Phone Number	

Mail.DAT Testing Scenarios

Test #	Test Name	Test Description	Test Date
1	A/B IMb Serialized Campaigns Testing (CPT/PBC/PDR)	Two campaigns within a job, each campaign will have its own serial start and serial end.	
2	IMb Serialized Campaigns - Gap Testing	Two campaigns within a job with a gap of serials in the middle that will not be a part of a campaign.	
3	Serial Number Restart	Using the data elements identified in the Technical Specification, Informed Delivery determines the lower and upper IMb serial number range for the given unique set(s) of campaign data and applies the same campaign to all mailpieces within the range.	
4	Commingle with PBC/PDR	Submit multiple campaigns split up by different mail owners in the mailing with PBC or PDR.	
5	Commingle with CPT	Submit multiple campaigns split up by different mail owners in the mailing with CPT.	
6	Comail with CPT	Submit multiple campaigns with multiple component records/versions.	
7	Copal	Submit campaigns for each of the Copal jobs before sending in the consolidator.	
8	MID-Based	Create campaign as MID-based using CPT.	
9	MCP Visibility Scenario	Verify that MID and IMb Serialized campaigns flow from <i>PostalOne!</i> to the Mailer Campaign Portal for the purposes of viewing, cancelling, and reporting against campaigns.	
10	RMB	Serial-Range Based Campaign with an RMB (Referenceable Mail Barcode) Driver.	
11	Test for Spoilage and Wastage	Run test with spoilage and wastage pieces.	

Mail.XML Testing Scenarios

Test #	Test Name	Test Description	Test Date
1	Mail.XML using Mail Piece Create Message at Piece Level	Applies to Letter and Flat mailings with one campaign at the Mail Piece message level. This accommodates a single address list with a single version that runs through the presort process and generates a one 'Document Version Data With Permit' record.	
2	Combined Mailing with Multiple Campaign Presentations at Piece Level ('Mail Piece Create Request')	Applies only to Letter mailings and accommodates multiple address lists through presort or post-presort software and can generate multiple components/versions.	
3	Commingle	Applies to Letter and Flat mailings. This scenario applies to the merging of multiple mail streams and multiple components/versions.	
4	Comail	Applies only to Flat mailings and accommodates multiple address lists and multiple versions combined through presort or post-presort software and generates multiple components/versions.	
5	Copal	Applies to Letter and Flat mailings. In this scenario, mailers submit multiple trays into the mail stream. Copal Presentations combine all the mailpieces into the consolidators' pallets to allow for increased mail volume and/or drop-ship discounts.	
6	Campaign(s) for an IMb Serial Number Range with Excluded Serials.	Applies the same Informed Delivery campaign to mailpieces in different Serial Number ranges. Informed Delivery creates one campaign within the whole IMb Serial Number range. Mailers can exclude mailpieces between the two Serial Number ranges from the campaign by creating two separate campaigns instead of one. Two campaigns within a job with a gap of serials in the middle that will not be a part of a campaign.	
7	Test for Spoilage and Wastage	Run test with spoilage and wastage pieces.	

4 Document History

Date	Version	Section	Description
4/16/2021	2.0	5 – Legal Terms	Updated the Terms and Conditions to new version dated 3/22/2021
9/11/2022	3.0	All	Updated the BCG screenshots and steps to reflect the new BCG format.
7/1/2022	4.0	All	Updated language and made minor edits.

5 Legal Terms

INFORMED DELIVERY® INTERACTIVE CAMPAIGNS: MAILER/SUBMITTER TERMS AND CONDITIONS OF USE AGREEMENT

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 or in the Informed Delivery Interactive Campaign Guide available at <https://www.usps.com/business/informed-delivery.htm>, 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. Content also 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 <https://www.usps.com/business/informed-delivery.htm>. 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, flat-size 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

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 nonaddress (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).

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Updated: 04/23/2021

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