

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

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USPS Mailing Promotions Portal

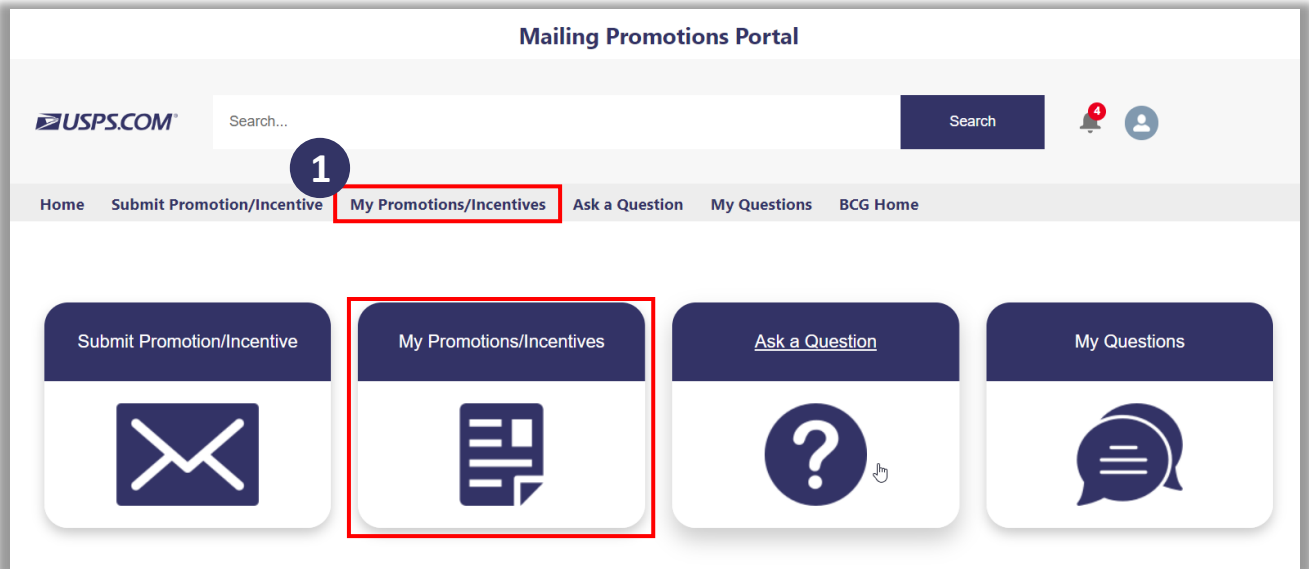
Incentive Permit Request Submission Process

How to Submit an Incentive Permit Request

Submitting an Incentive Permit Request provides Portal Users the ability to apply earned Postage Credit for a Mail Owner or on behalf of a Mail Service Provider (MSP) via their approval based on Postage Credit available on an Incentive Service Request that exceed their Fiscal Year Baseline Volume. Prior to submitting an Incentive Permit Request, the Incentive Registration Request must be in the **Baseline Confirmed**, **Registration needs Review**, or **Approved Status** to submit and claim credit for a Permit.

To submit a **Mail Owner Permit Request**, Portal Users will:

1. Log into the **Mailing Promotions Portal** and select the **My Promotions/Incentives** tab to submit a Permit request.



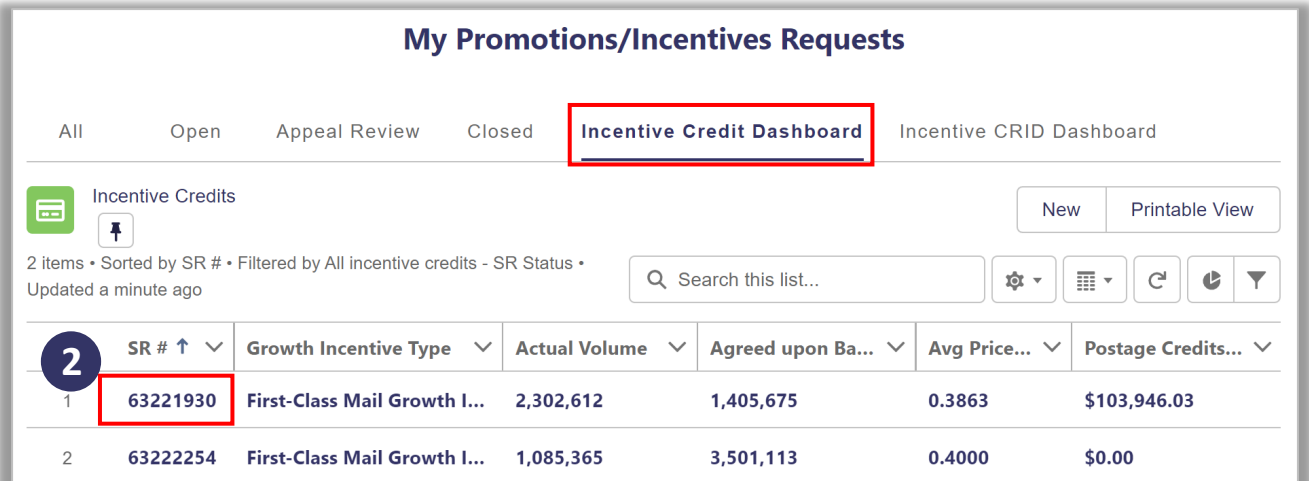
Mailing Promotions Portal

USPS.COM Search... Search [Notification Icon] [User Icon]

Home Submit Promotion/Incentive **My Promotions/Incentives** Ask a Question My Questions BCG Home

Submit Promotion/Incentive My Promotions/Incentives Ask a Question My Questions

2. Select the **Incentive Credit Dashboard** tab then select the **SR#** that has Credit information available to submit a **Permit**.



My Promotions/Incentives Requests

All Open Appeal Review Closed **Incentive Credit Dashboard** Incentive CRID Dashboard

Incentive Credits [New] [Printable View]

2 items • Sorted by SR # • Filtered by All incentive credits - SR Status • Updated a minute ago

Search this list... [Settings] [List View] [Refresh] [Filter]

	SR # ↑	Growth Incentive Type	Actual Volume	Agreed upon Ba...	Avg Price...	Postage Credits...
2	63221930	First-Class Mail Growth I...	2,302,612	1,405,675	0.3863	\$103,946.03
	63222254	First-Class Mail Growth I...	1,085,365	3,501,113	0.4000	\$0.00

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

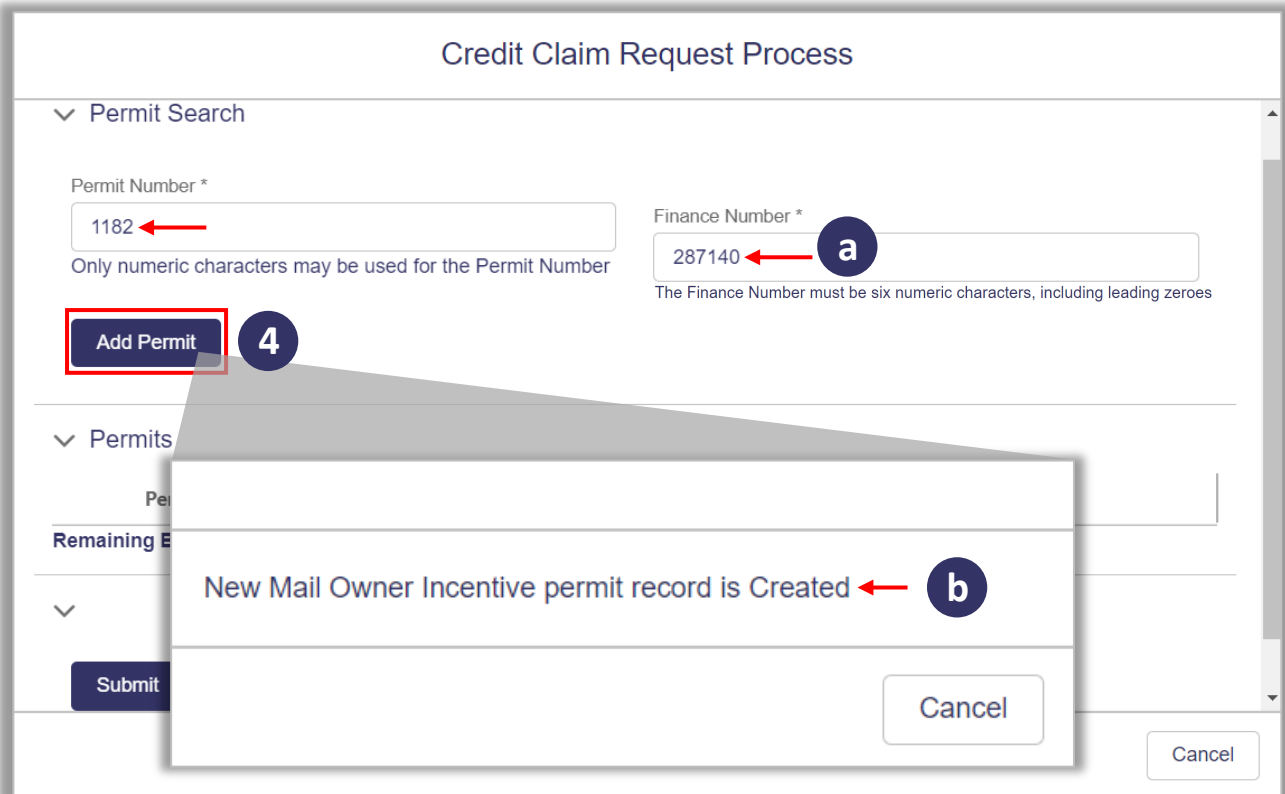
3. From the Service Request Details page, select the **Claim Credit** tab and button.



The screenshot shows the 'Service Request' details for request number 63221930. The status is 'Baseline Confirmed', the promotion type is 'First-Class Mail Growth Incentive', the original baseline is 2,491,040, and the agreed upon baseline is 1,405,675. The 'DETAILS' tab is selected, and the 'Claim Credit' button is highlighted with a red box and a blue circle containing the number 3. A callout box also highlights the 'Claim Credit' button.

4. Enter the **Permit Number** and **Finance Number** in the Permit Search fields, then select the **Add Permit** button.
- If a finance number does not have six digits, add zeros to the beginning until it equals six digits (i.e. Finance Number = 4839, add two zeros to the beginning 004839).
 - A confirmation message will appear when the Permit is successfully added to the list.

Note: Portal Users can add multiple Permits to the Permit list.



The screenshot shows the 'Credit Claim Request Process' page. The 'Permit Search' section has two input fields: 'Permit Number *' with the value '1182' and 'Finance Number *' with the value '287140'. A red arrow points to the '1182' and another red arrow points to the '287140'. A blue circle with the letter 'a' is next to the '287140' field. Below the fields is the 'Add Permit' button, highlighted with a red box and a blue circle containing the number 4. A confirmation message is displayed: 'New Mail Owner Incentive permit record is Created', with a red arrow pointing to the message and a blue circle containing the letter 'b'. The 'Submit' button is visible at the bottom left, and the 'Cancel' button is visible at the bottom right.

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

5. Once added, Portal Users can:
 - a. Select the pencil icon and enter the **Amount of Credit** needing to be applied to the Permit, then select the **Save** button.
 - b. Or select the **X** button to remove the Permit from the Credit Claim Request.

Credit Claim Request Process

▼ Permit Search

Permit Number * Finance Number *

▼ Permits

	Permit Number	Finance Number	Credit Amount	MSP Contact Email	
5	1 1182	287140	<input type="text"/>	<input type="text"/>	<input type="button" value="X"/>

Remaining Balance of Credits: 94835.03

▼

Credit Claim Request Process

Permit Number * Finance Number *

▼ Permits

	Permit Number	Finance Number	Credit Amount	MSP Contact Email	
	1 1182	287140	<input type="text" value="\$2,000.00"/>	<input type="text"/>	<input type="button" value="X"/>

Remaining Balance of Credits: 94835.03

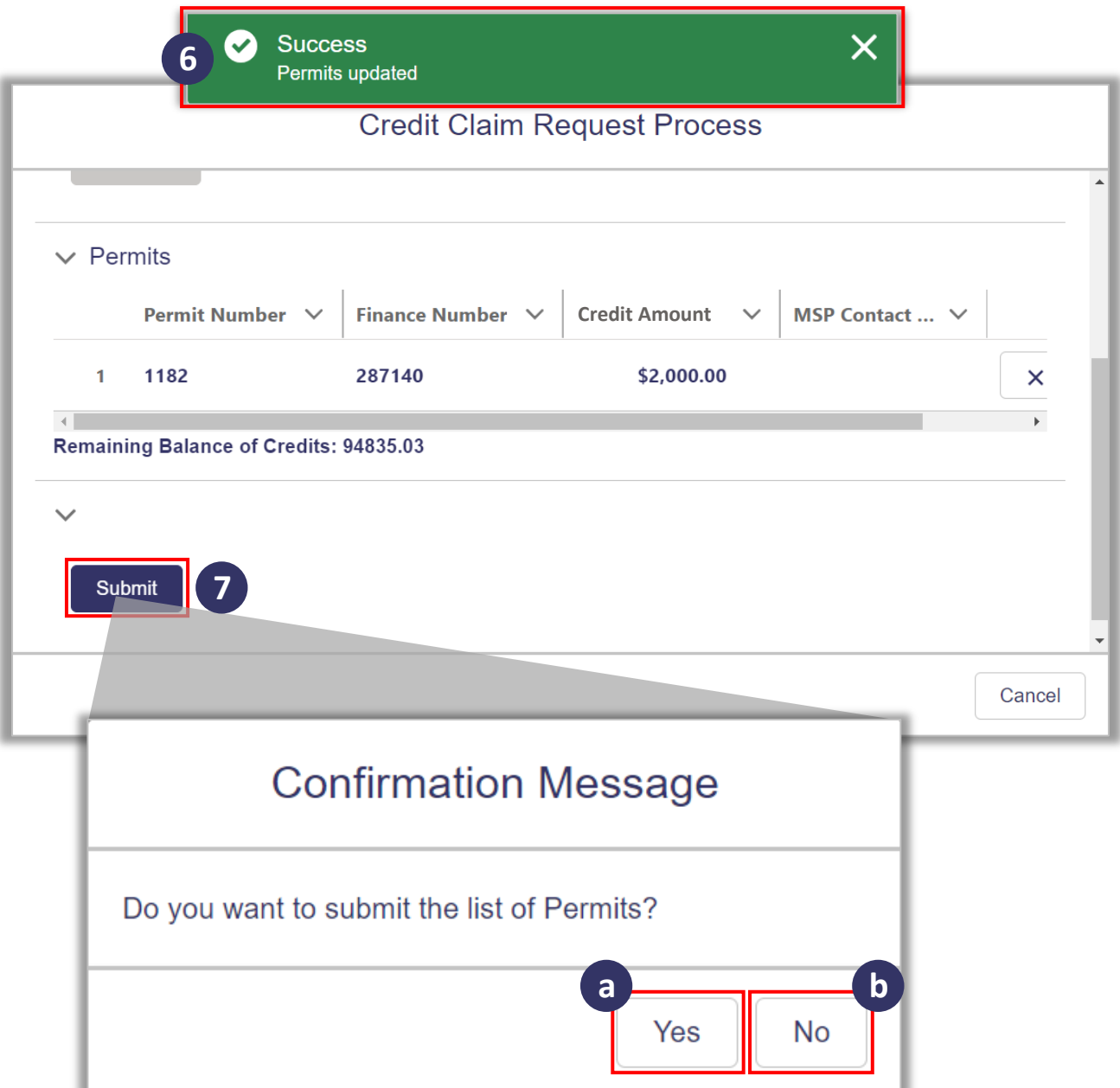
▼

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

6. A green banner message will appear stating the Permit was successfully updated.
7. Once all Permits are updated, select the **Submit** button and confirm the list of Permits being submitted is accurate.
 - a. If **Yes** is selected, the list of Permits will be submitted for approval.
 - b. If **No** is selected, Portal Users will have the chance to add or delete Permits.

Note: If more credit than available is submitted an error message will inform the Portal User to update their Credit Amount.



The screenshot displays the 'Credit Claim Request Process' interface. At the top, a green success banner (labeled 6) reads 'Success Permits updated'. Below this is a table of permits with columns for Permit Number, Finance Number, Credit Amount, and MSP Contact. The first row shows Permit Number 1182, Finance Number 287140, and Credit Amount \$2,000.00. A 'Submit' button (labeled 7) is highlighted in red. Below the table, a 'Confirmation Message' dialog box asks 'Do you want to submit the list of Permits?' with 'Yes' (labeled a) and 'No' (labeled b) buttons.

Permit Number	Finance Number	Credit Amount	MSP Contact ...
1 1182	287140	\$2,000.00	

Remaining Balance of Credits: 94835.03

Submit (7)

Confirmation Message


Do you want to submit the list of Permits?

Yes (a) No (b)

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

8. Once successfully submitted, navigate to the **Related** tab of the Service Request and select the **Permit record** in the **Incentive Permits** Pane to view the details.



Service Request
63221930

+ Follow
I Agree
I Disagree - Request Assistance

Status
Baseline Confirmed

Promotion Type
First-Class Mail Growth Incentive

Original Baseline
2,491,040

Agreed upon Baseline
1,405,675


DETAILS


RELATED

8

Post Claim Credit

Claim Credit


 **Files (1)**


 **Service_Request_63221930_Registratio...**
Jun 21, 2024 • 188B • csv

View All

Add Files

↑↓ Search this feed...

 **User16986954893318414414 (United States Postal Service)** updated this record.
June 21, 2024 at 10:47 AM

 **Incentive Permits (5)**

New

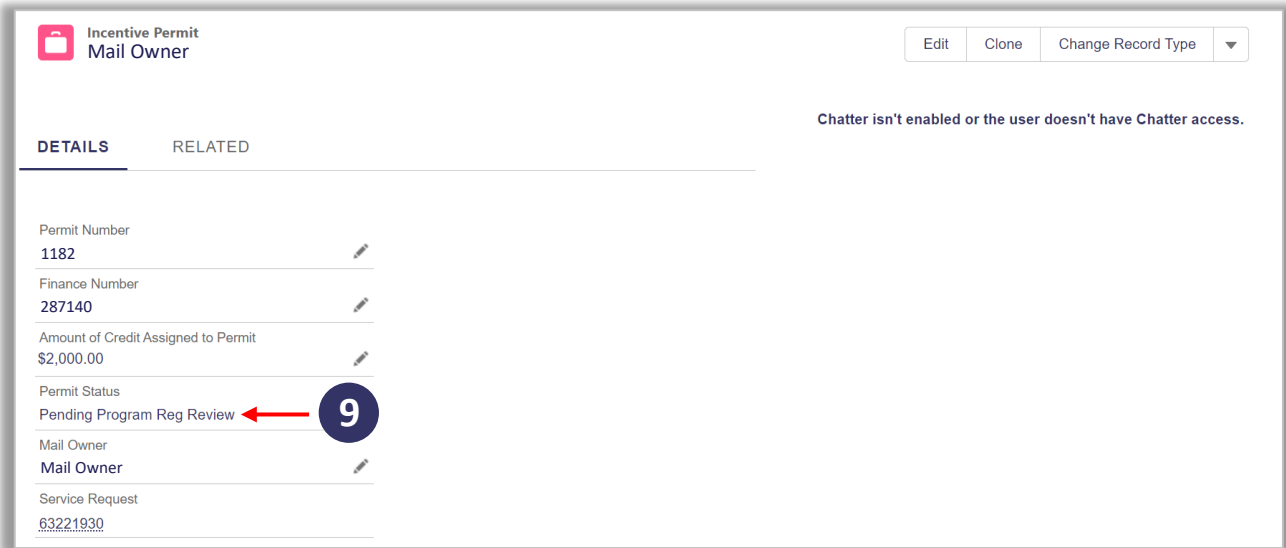
Mail Owner	Account	Amount of Credit A...	Permit Number	
test		\$1,000.00	222222	▼
test		\$1,000.00	111111	▼
test		\$111.00	111111	▼
Mail Owner ←		\$2,000.00	1182	▼
mohsine		\$2,500.00	457	▼

View All

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

9. The Permit Status will show as **Pending Program Reg Review** with auto-populated fields.



Incentive Permit
Mail Owner

Edit Clone Change Record Type ▼

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS RELATED

Permit Number
1182

Finance Number
287140

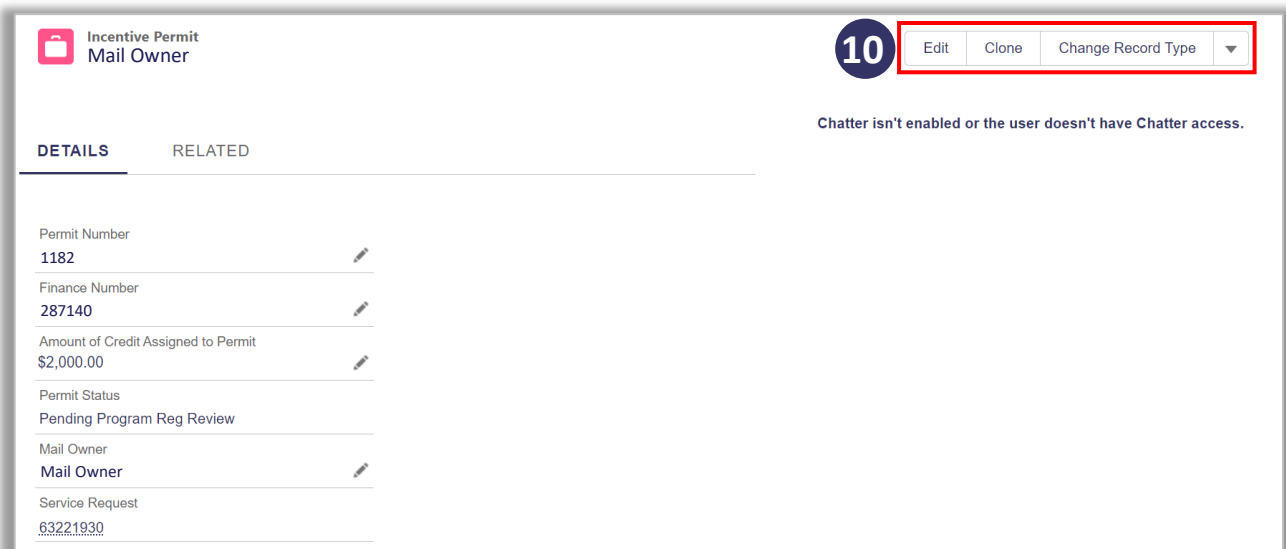
Amount of Credit Assigned to Permit
\$2,000.00

Permit Status
Pending Program Reg Review

Mail Owner
Mail Owner

Service Request
63221930

10. Portal Users will also have the ability to **Edit** the Permit record prior to approval, **Clone** the Permit record, or **Change the Record Type** prior to being approved.



Incentive Permit
Mail Owner

10 Edit Clone Change Record Type ▼

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS RELATED

Permit Number
1182

Finance Number
287140

Amount of Credit Assigned to Permit
\$2,000.00

Permit Status
Pending Program Reg Review

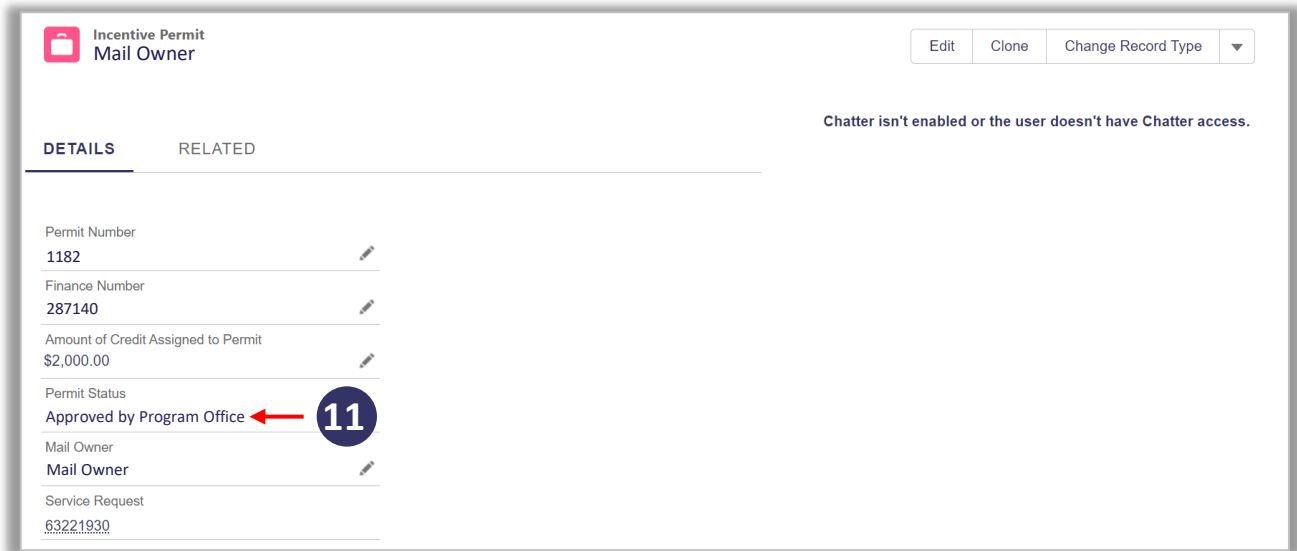
Mail Owner
Mail Owner

Service Request
63221930







USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

11. Once the submitted Permit record is reviewed, the Permits status will show as **Approved by Program Office** or **Rejected by Program Office**.



The screenshot displays the 'Incentive Permit Mail Owner' record page. At the top right, there are buttons for 'Edit', 'Clone', and 'Change Record Type'. Below these is a message: 'Chatter isn't enabled or the user doesn't have Chatter access.' The main content area has two tabs: 'DETAILS' (selected) and 'RELATED'. The 'DETAILS' tab shows a list of fields with their values and edit icons:

Permit Number	1182	
Finance Number	287140	
Amount of Credit Assigned to Permit	\$2,000.00	
Permit Status	Approved by Program Office	
Mail Owner	Mail Owner	
Service Request	63221930	

A red arrow points from a blue circle containing the number '11' to the 'Approved by Program Office' status text.

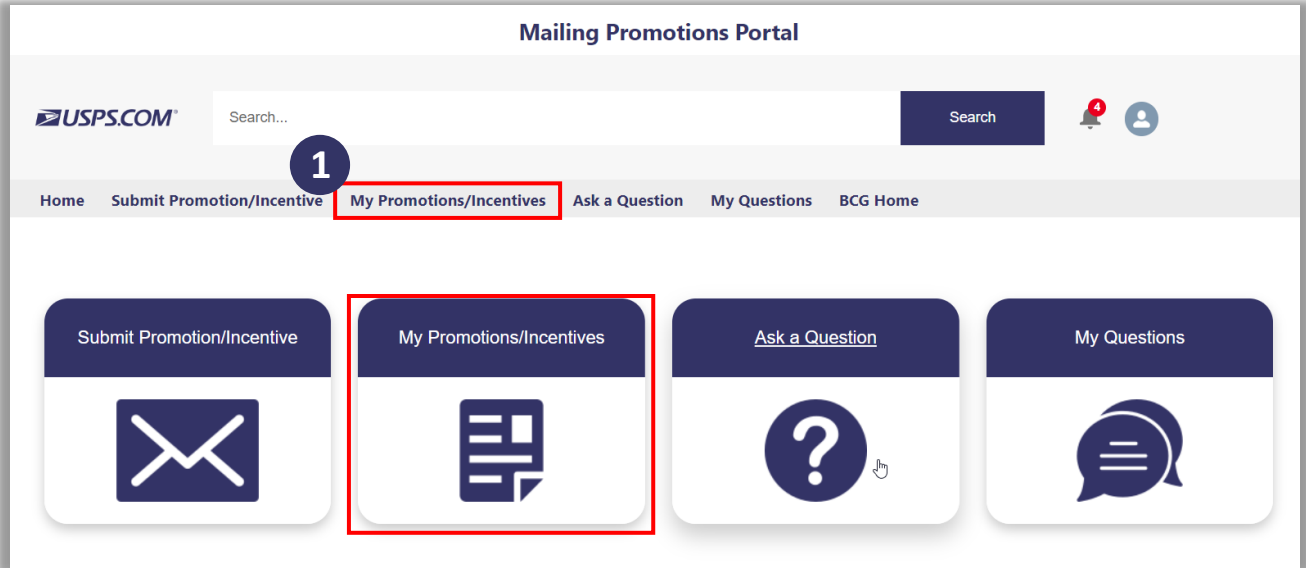
Note: If the Permit Status is Rejected by Program Office, submit a New Permit Request with updated details.

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

To submit an **MSP Permit Request**, Portal Users will:

1. Log into the **Mailing Promotions Portal** and select the **My Promotions/Incentives** tab to submit a Permit request.



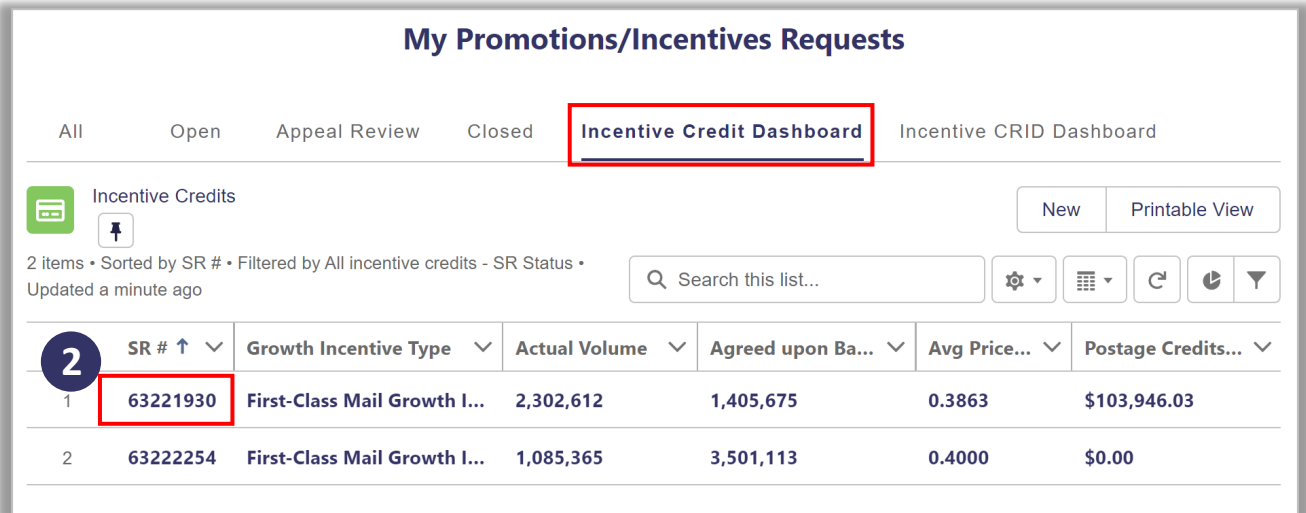
Mailing Promotions Portal

USPS.COM Search... Search [Notification Icon] [User Icon]

Home Submit Promotion/Incentive **My Promotions/Incentives** Ask a Question My Questions BCG Home

Submit Promotion/Incentive My Promotions/Incentives Ask a Question My Questions

2. Select the **Incentive Credit Dashboard** tab then select the **SR#** that has Credit information available to create the **Permit**.



My Promotions/Incentives Requests

All Open Appeal Review Closed **Incentive Credit Dashboard** Incentive CRID Dashboard

Incentive Credits [New] [Printable View]

2 items • Sorted by SR # • Filtered by All incentive credits - SR Status • Updated a minute ago

Search this list... [Settings] [List View] [Refresh] [Share] [Filter]

	SR # ↑	Growth Incentive Type	Actual Volume	Agreed upon Ba...	Avg Price...	Postage Credits...
1	63221930	First-Class Mail Growth I...	2,302,612	1,405,675	0.3863	\$103,946.03
2	63222254	First-Class Mail Growth I...	1,085,365	3,501,113	0.4000	\$0.00

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

3. From the Service Request Details page, select the **Claim Credit** tab and button.

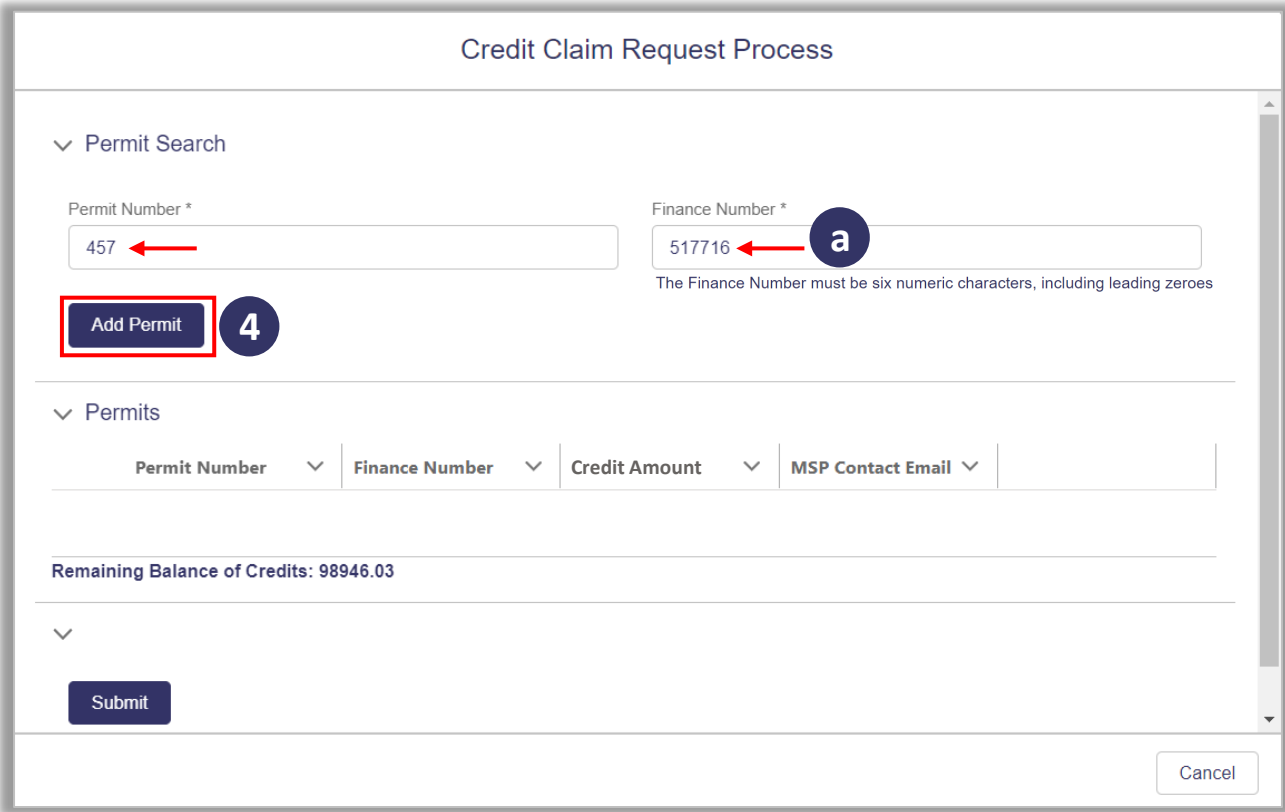


The screenshot shows the 'Service Request' page for request number 63221930. The status is 'Baseline Confirmed'. The promotion type is 'First-Class Mail Growth Incentive'. The original baseline is 2,491,040 and the agreed upon baseline is 1,405,675. The 'DETAILS' tab is selected, and the 'Claim Credit' button is highlighted with a red box and a blue circle containing the number 3. A dropdown menu is open, showing the 'Claim Credit' option selected.

4. Enter the **Permit Number** and **Finance Number** in the Permit Search fields, then select the **Add Permit** button.

- If a finance number does not have six digits, add zeros to the beginning until it equals six digits (i.e. Finance Number = 4839, add two zeros to the beginning 004839).

Note: Portal Users can add multiple Permits to the Permit list.



The screenshot shows the 'Credit Claim Request Process' page. The 'Permit Search' section has two input fields: 'Permit Number *' with the value '457' and 'Finance Number *' with the value '517716'. A red arrow points to the '457' field, and a blue circle with the letter 'a' points to the '517716' field. Below the 'Finance Number' field, a note states: 'The Finance Number must be six numeric characters, including leading zeroes'. The 'Add Permit' button is highlighted with a red box and a blue circle containing the number 4. Below the search fields, there is a 'Permits' section with a table of columns: 'Permit Number', 'Finance Number', 'Credit Amount', and 'MSP Contact Email'. The 'Remaining Balance of Credits' is 98946.03. A 'Submit' button is at the bottom left, and a 'Cancel' button is at the bottom right.

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

5. An acknowledgement message will appear requesting the Mail Service Providers point of contact email so the Permit request can be sent for their approval.
6. Once their email is entered, select the **Confirm** button and a confirmation message will appear when the Permit is successfully created and added to the list.

Our records show that the provided Permit and Finance Number are owned by another account. Please provide the email address of a point of contact for this Permit who can approve its use for your application of credit on this Permit. Note that this will be viewable by the Program Office.

Email

MSP.POC@email.com ← 5

By clicking Confirm, you acknowledge that you are transferring your postage credits to a third party and relinquish all further rights and visibility of these postage credits in postal systems.

6

Confirm

Cancel

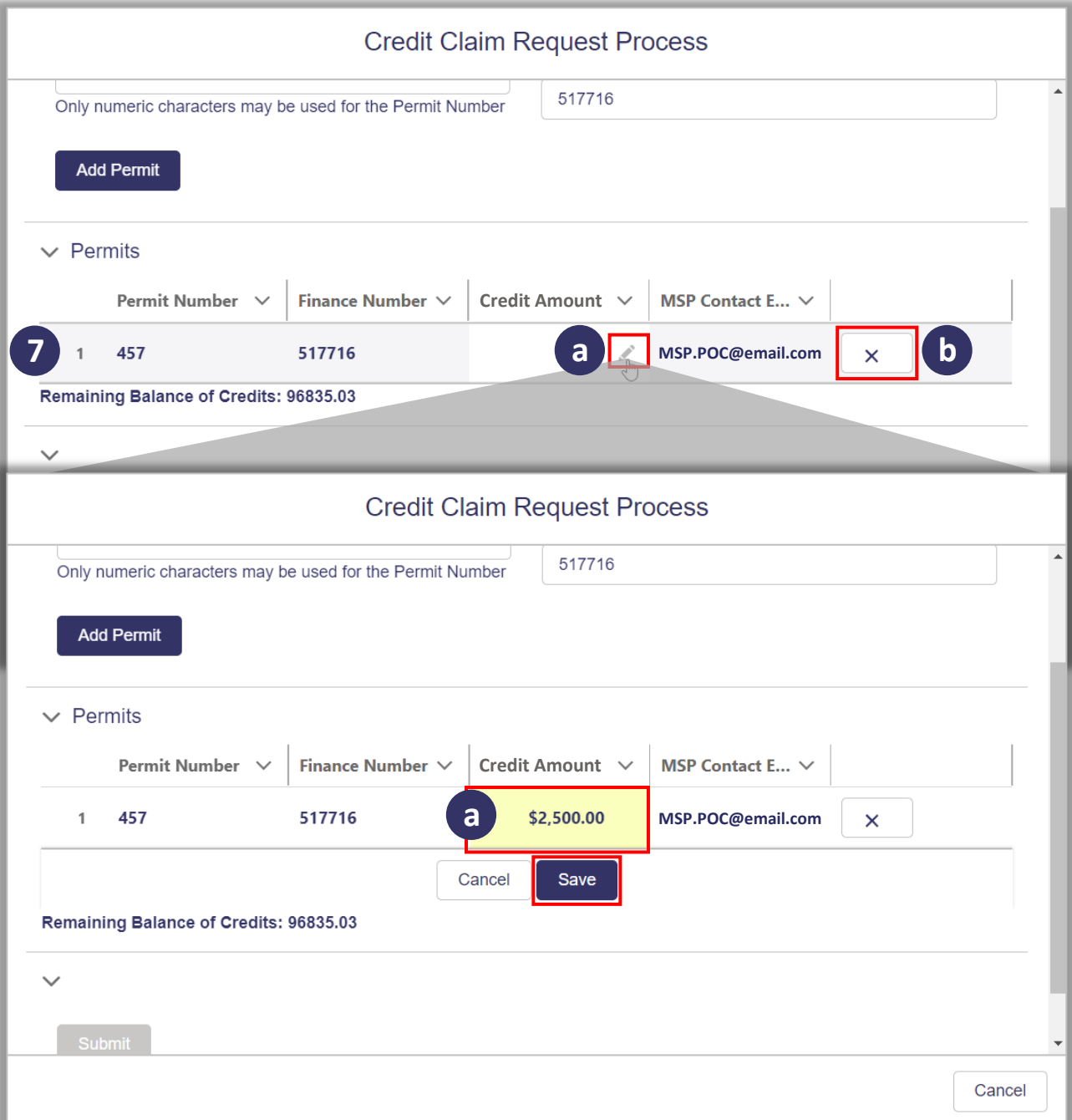
New MSP Incentive permit record is Created

Cancel

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

7. Once the message is acknowledged, Portal Users can:
 - a. Select the pencil icon and enter the **Amount of Credit** needing to be applied to the Permit, then select the **Save** button.
 - b. Or select the **X** button to remove the Permit from the Credit Claim Request.



Credit Claim Request Process

Only numeric characters may be used for the Permit Number

Add Permit

Permits

Permit Number	Finance Number	Credit Amount	MSP Contact E...
1 457	517716	a <input type="text" value="\$2,500.00"/>	MSP.POC@email.com b <input type="button" value="X"/>

Remaining Balance of Credits: 96835.03

Save

Submit

Cancel

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

8. A green banner message will appear stating the Permit was successful updated.
9. Once all Permits are updated, select the **Submit** button and confirm the list of Permits being submitted is accurate.
 - a. If **Yes** is selected, the list of Permits will be submitted to the MSP for approval.
 - b. If **No** is selected, Portal Users will have the chance to add or delete Permits.

Note: If more credit than available is submitted an error message will inform the Portal User to update their Credit Amount.



Credit Claim Request Process

Only numeric characters may be used for the Permit Number

∨ Permits

	Permit Number ∨	Finance Number ∨	Credit Amount ∨	MSP Contact Email ∨	
1	457	517716	\$2,500.00	MSP.POC@email.com	<input type="button" value="X"/>

Remaining Balance of Credits: 94335.03

∨

9


Confirmation Message

Do you want to submit the list of Permits?

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

10. Once successfully submitted, navigate to the **Related** tab of the Service Request and select the **Permit record** in the **Incentive Permits** Pane to view the details



Service Request
63221930

+ Follow
I Agree
I Disagree - Request Assistance

Status
Baseline Confirmed

Promotion Type
First-Class Mail Growth Incentive


Original Baseline
2,491,040

Agreed upon Baseline
1,405,675

DETAILS
RELATED
10

Post Claim Credit


Claim Credit

 **Files (1)**

Service_Request_63221930_Registratio...
Jun 21, 2024 • 188B • csv

Add Files


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 **Incentive Permits (5)**

New

Mail Owner	Account	Amount of Credit A...	Permit Number	
test		\$1,000.00	222222	▼
test		\$1,000.00	111111	▼
test		\$111.00	111111	▼
Treasure Aisles An...		\$2,000.00	1181	▼
mohsine ←		\$2,500.00	457	▼

[View All](#)

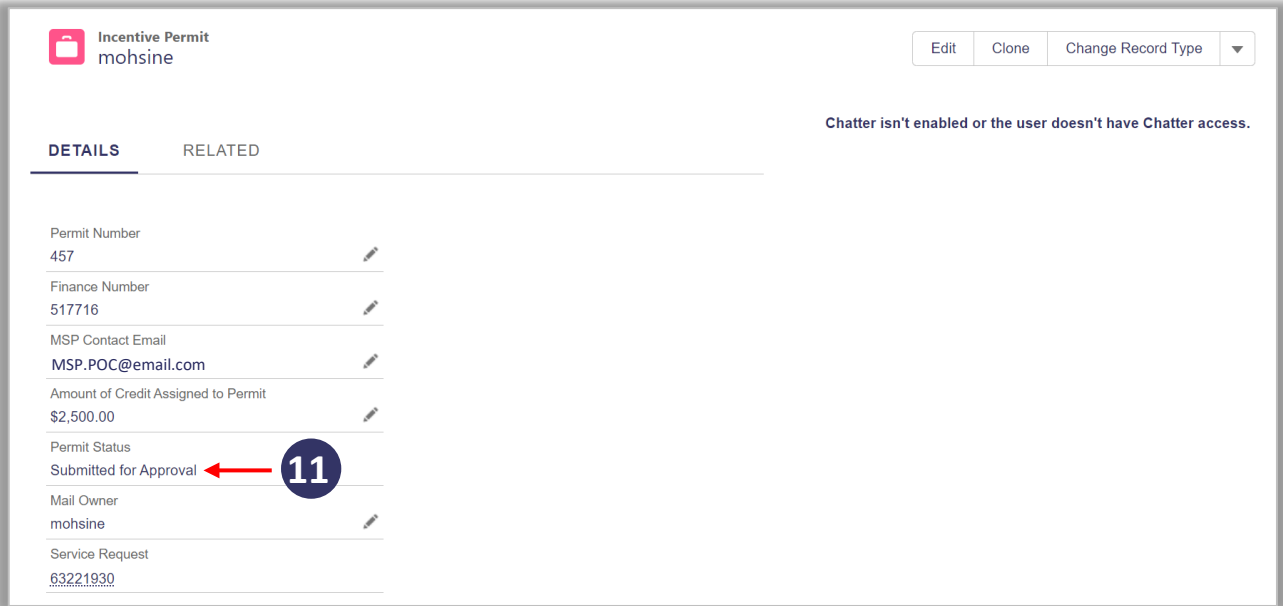


User16986954893318414414 (United States Postal Service) updated this record.
June 21, 2024 at 10:47 AM

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

11. The Permit Status will show as **Submitted for Approval** with auto-populated fields.










Incentive Permit
mohsine

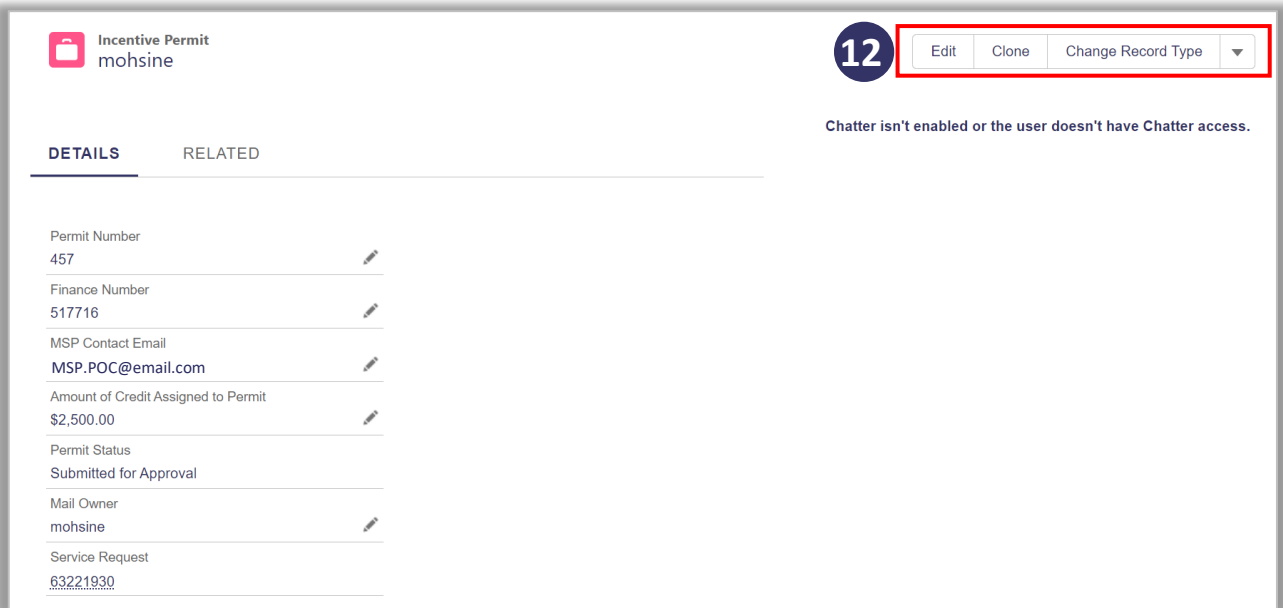
Edit Clone Change Record Type ▼

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS RELATED

Permit Number	457	
Finance Number	517716	
MSP Contact Email	MSP.POC@email.com	
Amount of Credit Assigned to Permit	\$2,500.00	
Permit Status	Submitted for Approval	
Mail Owner	mohsine	
Service Request	63221930	

12. Portal Users will also have the ability to **Edit** the Permit record prior to approval, **Clone** the Permit record, or **Change the Record Type** prior to being approved.










Incentive Permit
mohsine

12 Edit Clone Change Record Type ▼

Chatter isn't enabled or the user doesn't have Chatter access.

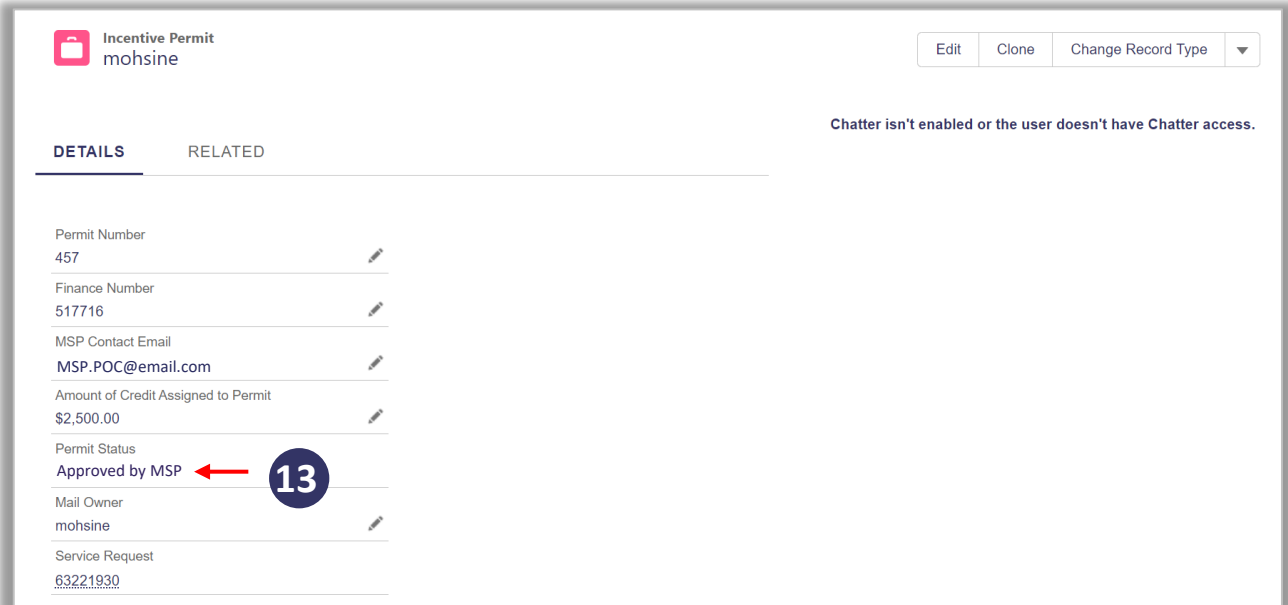
DETAILS RELATED

Permit Number	457	
Finance Number	517716	
MSP Contact Email	MSP.POC@email.com	
Amount of Credit Assigned to Permit	\$2,500.00	
Permit Status	Submitted for Approval	
Mail Owner	mohsine	
Service Request	63221930	

USPS Mailing Promotions Portal

Incentive Permit Request Submission Process

13. Once the submitted Permit record is reviewed by the MSP, the Permits status will show as **Approved by MSP** or **Rejected by MSP**.










Incentive Permit
mohsine

Edit Clone Change Record Type ▼

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS RELATED

Permit Number	457	
Finance Number	517716	
MSP Contact Email	MSP.POC@email.com	
Amount of Credit Assigned to Permit	\$2,500.00	
Permit Status	Approved by MSP	
Mail Owner	mohsine	
Service Request	63221930	

Note: If the Permit Status is Rejected by the MSP, submit a New Permit Request with updated details.