INFORMED VISIBILITY®

Mail Tracking & Reporting

Applying for Access to IV-MTR

V4.1, September 21, 2019
This training provides step-by-step instructions for setting up your IV-MTR account.

For more details about anything in this training, please see the IV-MTR User Guide on PostalPro.

Acronym definitions, IV Solutions Center contact information, and additional resources are provided in the Additional Information section of this training.

Only want to share your mail tracking data?

The IV-MTR application allows you to access and manage mail tracking data for your organization.

If your organization would like to delegate its mail tracking information to a third party (such as a mail service provider) instead of directly accessing the tracking information, it may not be necessary to register for the IV-MTR service.*

Contact the IV Solutions Center for more information.

*Note that Business Customer Gateway (BCG) registration will still be required.
To access the IV-MTR service, you need:

1. A designated Business Service Administrator (BSA)
2. Any existing Customer Registration IDs (CRIDs) you want access to
3. An existing Business Customer Gateway (BCG) account
4. IV-MTR privileges (requested and granted through the BCG)

More information about each of these steps is provided in the following slides.
Before you begin requesting IV-MTR access, you must decide who the IV-MTR BSA for your CRID will be.

The IV-MTR BSA is responsible for all administrative actions in IV-MTR, including:

- Granting access to other users
- Controlling data visibility
- Managing data delegation
- Managing user roles and permissions
- Removing access for users

The BCG automatically makes the first person to request the IV-MTR service the BSA.

- Be sure to coordinate with your team so that the correct person is made the IV-MTR BSA. Note that if someone already has access to IV-MTR for a CRID, then a BSA already exists.

- **Don’t want to be the IV-MTR BSA?** If you accidentally became the IV-MTR BSA or you no longer want to be the IV-MTR BSA, please contact the IV Solutions Center for assistance.
Access to IV-MTR is granted on a per-CRID basis, so it is important to understand what CRID you need access to.

If your organization does not have an existing CRID, one will be assigned during registration. You may skip to the next section.

If your organization already has one or more CRIDs, determine which one(s) you need access to before registering.

If you need access to more than one CRID, consult with your team to determine how multiple CRID access is handled in your organization.

- There are a number of reasons why you may need access to multiple CRIDs. For example, your organization may have multiple business addresses or your company may manage mailpiece data for your customers.
There are two options for gaining access to multiple CRIDs:

1. Request access to each CRID individually
   • This requires you to know and/or set up each CRID and add them to your profile

2. Create a central CRID and have other CRIDs delegate their data to the central CRID
   • This uses the IV-MTR feature of Data Delegation. See the IV-MTR User Guide for more details.

Both options require the CRIDs BSA(s)’ approval for you to gain access. When applying for access to IV-MTR, make sure you apply for the right CRID.
The steps for setting up IV-MTR access vary by role:

<table>
<thead>
<tr>
<th>If you <strong>are</strong> the IV-MTR BSA:</th>
<th>If you <strong>are not</strong> the IV-MTR BSA:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Set up a BCG account (if necessary)</td>
<td>1. Set up a BCG account (if necessary)</td>
</tr>
<tr>
<td>2. Add the IV-MTR service</td>
<td>2. Request the IV-MTR service</td>
</tr>
<tr>
<td>3. Enter the one-time BSA authorization code</td>
<td>3. Receive IV-MTR access approval</td>
</tr>
<tr>
<td>4. Sign into the IV-MTR application</td>
<td>4. Sign into the IV-MTR application</td>
</tr>
</tbody>
</table>
How do I begin?

- Use the table below to proceed to the correct section of this training, based on your role and existing account information:

### IV-MTR BSAs

<table>
<thead>
<tr>
<th>If you:</th>
<th>Begin with:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not have a BCG account,</td>
<td>Registering for a BCG Account</td>
</tr>
<tr>
<td>Have a BCG account but not the IV-MTR service,</td>
<td>Adding the IV-MTR Service</td>
</tr>
<tr>
<td>Have the IV-MTR service but have not accessed IV-MTR yet,</td>
<td>Entering the One-Time Authorization Code</td>
</tr>
</tbody>
</table>

### All Other IV-MTR Users

<table>
<thead>
<tr>
<th>If you:</th>
<th>Begin with:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not have a BCG account,</td>
<td>Registering for a BCG Account</td>
</tr>
<tr>
<td>Have a BCG account but not the IV-MTR service,</td>
<td>Adding the IV-MTR Service</td>
</tr>
<tr>
<td>Have been approved for the IV-MTR service, but have not accessed IV-MTR yet,</td>
<td>Signing into IV-MTR</td>
</tr>
</tbody>
</table>
Setting Up a BCG Account
The BCG is a single entry point for multiple United States Postal Service® (USPS®) online business services, including the IV-MTR application. To access the IV-MTR application, you must first have a BCG account.

The steps for registering on BCG are:

1. Access the BCG website
2. Choose Register
3. Pick a username
4. Enter security information
5. Enter contact information
6. Find your company’s address via mailing address, ZIP Code, or CRID
7. Review and accept the Privacy Policy

Detailed instructions for completing these steps are provided in the following slides.
To register for a BCG account:
2. In the Sign In box, click Sign Up.
3. On the registration page, pick a username.

Note:

- The username must contain at least six characters and may contain special characters.
- You can use your email address as the username.
- Your BCG username is case-sensitive when logging in.
- After entering a username, the BCG automatically checks if it is available. If the username is already in use, suggestions are provided to choose from, or you may enter another username of your choice.
4. In the next area, enter a password and two security questions and answers.

Note:
- The password must contain at least eight characters and include an uppercase letter, lowercase letter, and number. The password is case-sensitive.
- The security questions will assist you in gaining access to the BCG if you forget your password. The answers are not case-sensitive.
5. In the next area, enter your name, phone number, and email address. You may also select whether to receive communications from the USPS and our partners.

**Step 3: Enter your contact information**

Please review and edit your contact information for your USPS account

* indicates a required field

<table>
<thead>
<tr>
<th>Name</th>
<th>Email &amp; Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>* Email Address</td>
</tr>
<tr>
<td>* First Name</td>
<td>* Re-Type Email Address</td>
</tr>
<tr>
<td>M.L.</td>
<td>* Type</td>
</tr>
<tr>
<td>* Last Name</td>
<td>*</td>
</tr>
<tr>
<td>Suffix</td>
<td>Mobile (U.S. Only)</td>
</tr>
</tbody>
</table>

**Can we contact you?**

Get communications from USPS and our partners.

- [ ] From USPS
- [ ] From USPS Partners
6. At the bottom of the page, select the method for finding your business location:

- **Address**
- **ZIP Code™**
- **Company Identifier** (i.e., CRID)

Click the link for the selected method to continue.

**Step 4: Find address by...**

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

Please choose how you would like to find your address

- Address
- ZipCode™
- Company Identifier

**Note:** If you know the CRID for your business location, select **Company Identifier**. This option is the quickest and will help ensure you are properly associated to your business location.
A. If you selected **Address**, an additional area appears. Complete the required fields then click **Verify Address**.
The next screen or screens depend on whether the address and company information entered are recognized by the USPS system:

- If the address entered is not recognized by USPS, recommended addresses are listed. Select the most accurate address, and then click Continue.
- If the address entered matches a business address already in the USPS system, you are prompted to verify the business. Select the correct business, and then click Continue. If the business is not listed, select None of the above, and then click Continue.
- If the company information is similar to an existing company in the USPS system, you are prompted to confirm whether your company matches the existing record. Select the correct business, and then click Continue.
A. If you selected **ZIP Code**, an additional area appears. Enter your business location ZIP Code, and click **Search**.
B. If prompted, select your city/state, and click Continue.
C. When prompted, enter your company name and street address, and then click Continue.
D. The next screen or screens depend on whether the address and company information entered are recognized by the USPS system:

- If the address entered is not recognized by USPS, recommended addresses are listed. Select the most accurate address, and then click Continue.

- If the address entered matches a business address already in the USPS system, you are prompted to verify the business. Select the correct business, and then click Continue. If the business is not listed, select None of the above, and then click Continue.

- If the company information is similar to an existing company in the USPS system, you are prompted to confirm whether your company matches the existing record. Select the correct business, and then click Continue.
If you selected **Company Identifier**, an additional area appears. Enter your CRID, and click **Find CRID**.

**Step 5: Find by CRID**

Search for your Company Identifier (CRID) and validate your company so it can be verified as a valid delivery address.

* indicates a required field

**Enter Your Company Identifier (CRID)**

Please enter your CRID so we can get an accurate address for you.

- CRID

[Search button]
7. Once you have verified your address, read the privacy policy, and click **Create Account**.
A confirmation screen appears. You also receive an email with details on your new account.

And you're registered!

You've registered the username IV_Comms_Example. Check your inbox for an email with details on your new account.

Now, you'll be directed to your account, where you can explore its tools.

After a few seconds, you are automatically redirected to the BCG landing page. Keep the page open and continue to Add the IV-MTR Service.
Adding the IV-MTR Service
Once you have a BCG account, you must request access to the IV-MTR application. Access is requested through the BCG portal.

- If you are the BSA, access will be granted immediately and you will need to enter a one-time authorization code to set up your CRID in IV-MTR.

- If you are not the BSA, your access request will be submitted to the BSA. After the BSA has granted you access, you will receive a notification email.
The steps for requesting IV-MTR access depend on two factors:

1. Whether you are a new BCG user, and
2. Whether your business location (CRID) is new to the BCG.

Use the table below to determine which instructions you should follow:

<table>
<thead>
<tr>
<th>New Location (CRID)</th>
<th>Existing Location (CRID)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your business location (i.e., CRID) is newly established in the BCG, and you are the first BCG user associated with the location</td>
<td>Your business location (i.e., CRID) was previously established in the BCG, and other BCG users are associated with the location</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New User</th>
<th>New User</th>
<th>Existing User</th>
<th>Existing User</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have a BCG account but do not yet have access to any services</td>
<td>New user at a new location</td>
<td>New user at an existing location</td>
<td>Existing user at a new location</td>
</tr>
</tbody>
</table>
Adding the IV-MTR Service

New User at a New Location
1. After you finish registering for a BCG account, you are taken to the page shown below. Note your CRID, provided in the top section.

Note: If you are not taken to this page or you have exited the BCG, go to https://gateway.usps.com and log in with your BCG username and password. You will be directed to this page.
2. Review the business services for which you will be given permission. As a new user at a new business location, you are given the core BCG services.

Note: The IV-MTR service is not included in the core BCG services. Follow the remaining steps to continue to the BCG and request the IV-MTR service.
New User at a New Location

3. Read the terms and conditions.

4. Click Continue. You receive an email containing your CRID and MID and confirming the services you have been granted.

Note: As the first user to register for your location, you are assigned as the BSA for the core services. In addition, you will automatically become the BSA for any additional services (e.g., IV-MTR) for which you are the first user to request the service for your location.
You are taken to a page that displays your MID and the business services you now have access to. You have become the BSA for the services with an asterisk (*).
New User at a New Location

5. If you are a Mail Service Provider (MSP), check the appropriate box.

6. Click Continue. You are taken to the BCG welcome page.
New User at a New Location

7. Click **Mailing Services**.

8. In the list of services, find "Informed Visibility," and click **Get Access**. The button turns green, and the text changes to **Go to Service**.

Now that you have a BCG account and the IV-MTR service, see **Receive and Enter the Authorization Code**.
Adding the IV-MTR Service

New User at an Existing Location
1. After you finish registering for a BCG account, you are taken to the page shown below. Note your CRID, provided in the top section.

**Note:** If you are not taken to this page or you have exited the BCG, go to https://gateway.usps.com and log in with your BCG username and password. You will be directed to this page.
New User at an Existing Location

2. Under **Add Services for your Business Location**, select **I’d like to custom select services for my Business Location**. The list of business services displays for you to choose from.
3. Under **Additional Mailing Services**, select **Informed Visibility**.

4. Click **Continue With Selection**.

**Note:** You may also select any additional services you want to request.
5. A section appears explaining that you can become the BSA if you are the first user to request a service for your business location. Select **Yes** or **No**.

6. Review the terms and conditions, and then click **Continue**. You receive an email containing your CRID, the list of services you have been granted, and the list of services for which your access is pending approval from the BSA.

**Note:** If you select **No**, you may continue. However, for any requested service without a BSA assigned, your access to that service will be pending until a BSA is assigned and he or she has approved your request.
New User at an Existing Location

You are taken to a page that displays your MID, the list of services you have been granted, and the list of services for which your access is pending approval from the BSA.

Register Your Account Getting Started You're signed up!

You're signed up!

Congratulations, your account is set up with business services.

Review the status of your service access below. Having access to a service means that you can see and use it freely. Depending on your company’s needs, different employees may need access to different services. The access is regulated by the Business Service Administrator (BSA) of each service.

Your Business Location: IV COMMUNICATORS
3001 PROSPERITY AVE
FAIRFAX, VA 22031-2210
UNITED STATES

CRID: 27723960

The following Mailer ID (MID) is currently assigned to this business location: 902541716

Continue
New User at an Existing Location

7. Click **Continue**. You are taken to the BCG welcome page.

If you are not the IV-MTR BSA, you must wait for the BSA to approve your request for the service. When your request is approved, you receive an email notification.

If you are the IV-MTR BSA, see **Receive and Enter the Authorization Code**.
Adding the IV-MTR Service

Existing User at a New Location
Existing User at a New Location

1. Log into the BCG.
2. Click Manage Account.

3. Click Manage Locations.

4. Click Add Location.
Existing User at a New Location

5. Enter the address information on the left and click Search OR enter your CRID number on the right and click Continue.
6. Follow the on-screen steps to confirm the address and verify the business name, if needed.

7. When you reach a confirmation page, review the information, and then click **Confirm Add Location**.
8. When the **Add Services for your Business Location** section appears, select **I’d like to custom select services for my Business Location**. The list of business services displays for you to choose from.
9. Under **Additional Mailing Services**, select **Informed Visibility**.

- **Enhanced Barcode Diagnostics**: EBD-mobile app for mailers to scan barcodes & receive info about the visible/non-visible elements
- **Informed Visibility**: Provides mail tracking data for letters, flats, bundles, handling units, and containers.
- **Mailer Visibility**: Mailer Visibility is a mobile app for mailers to nest containers to trailers at DMUs
- **Picture Permit Indicia**: Picture Permit Indicia provides organizations with the opportunity to use custom permit indicia.
- **Share Mail**: Share Mail - Send Single-Piece First-Class Mail letters or postcards without affixing a stamp.

**Note**: You may also select any additional services you want to request.

10. Click **Continue With Selection**.
11. A section appears explaining that you can become the BSA if you are the first user to request a service for your business location. Select **Yes** or **No**.

12. Review the terms and conditions, and then click **Continue**. You receive an email confirming that you have added a location to your account. The email contains your CRID and the list of services you have been granted.

**Note:** If you select **No**, you may continue. However, for any requested service without a BSA assigned, your access to that service will be pending until a BSA is assigned and he or she has approved your request.
You are taken to a page that displays the list of services you have been granted. You have become the BSA for the services with an asterisk (*).
Existing User at a New Location

13. On this page, click **Continue**. You are taken to the BCG welcome page.

If you are not the IV-MTR BSA, you must wait for the BSA to approve your request for the service. When your request is approved, you receive an email notification.

If you are the IV-MTR BSA, see **Receive and Enter the Authorization Code**.
Adding the IV-MTR Service

Existing User at an Existing Location
1. Log into the BCG.
2. Click Mailing Services.
3. If you have access to more than one location, you may specify the location for which you want to add the IV-MTR service by selecting the location from the **Your Locations** drop-down menu.
Existing User at an Existing Location

4. In the list of services, find “Informed Visibility,” and click **Get Access**. The button turns green, and the text changes to **Go to Service**.
Existing User at an Existing Location

- If you were the first user to request the IV-MTR service for this CRID, and when you initially registered for the BCG you were the first user for your location or you selected to become the BSA for any service that does not already have a BSA, you become the IV-MTR BSA for this CRID. You receive an email confirming the addition of the service. Now that you have a BCG account and the IV-MTR service, see Receive and Enter the Authorization Code.

- If an IV-MTR BSA already exists for this CRID, you receive an email stating that your request is pending approval by the BSA. When your request is approved, you receive an additional email.

- If an IV-MTR BSA has not been assigned for this CRID and when you initially registered for the BCG you were not the first user for your location or you did not select to become the BSA for any service that does not already have a BSA, your request for the service will remain pending until a BSA is assigned and he or she approves your request. When your request is approved, you receive an additional email.
Entering the One-Time Authorization Code (BSAs Only)
The **IV-MTR BSA user for the CRID** should complete these steps:

1. Ensure you have a BCG account and the IV-MTR service for each CRID for which you should be the IV-MTR BSA.
2. Access the IV-MTR application through the BCG or at [IV.USPS.COM](http://IV.USPS.COM).
3. A window prompts you to enter the authorization code for each CRID. Click **Email Code to IV BSA** to receive an email with the authorization code.
4. Upon receiving the email, return to the IV-MTR application, enter the code for each CRID, and click **Submit**. If the BSA entered the code correctly, the CRID is successfully set up within the application.

**Note:** There is a separate authorization code for each CRID.
4. Upon receiving the email, return to the IV-MTR application, enter the code for each CRID, and click **Submit**.

- If the BSA entered the code correctly, the CRID is successfully set up within the application and the IV-MTR homepage (Queries & Feeds) will display.
- If the code was entered incorrectly, an error message will appear next to the Submit button. Enter the correct code and click **Submit** again.

**Note:** There is a separate authorization code for each CRID. If you are entering codes for multiple CRIDs, verify you enter the correct code for each CRID.
IMPORTANT: Contact the IV Solutions Center at 1-800-238-3150, Option 2, or InformedVisibility@usps.gov for any of the following issues:

- You are the IV-MTR BSA and are not prompted to enter the authorization code upon accessing the IV-MTR application. This means you were not properly established as the IV-MTR BSA in the BCG.
- The code does not work.
- You want to make someone else the IV-MTR BSA.

The IV-MTR BSA and BSA Delegate(s) are responsible for managing access to the IV-MTR service for their CRIDs. This includes approving user requests for the service and designating BSA Delegates (if needed). Instructions for these functions are available in the IV Mail Tracking & Reporting User Guide and IV BSA Instructions.

The IV-MTR BSA, BSA Delegate(s), and any users who have been assigned IV application user roles can perform administrative functions for their CRID in the IV-MTR application. These additional functions are described in the IV Mail Tracking & Reporting User Guide.
Signing into the IV-MTR Application
The IV-MTR application is located at: iv.usps.com

Note: Chrome is the recommended browser for viewing IV-MTR.
To log into the IV-MTR portal from the IV-MTR homepage, click **Log In**.
Enter your BCG username & password, then click **Sign In**.
Once you log in, the **Informed Visibility** application will appear.

- The homepage defaults to the Queries & Feeds page.
Additional Information
<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BCG</td>
<td>Business Customer Gateway</td>
</tr>
<tr>
<td>BSA</td>
<td>Business Service Administrator</td>
</tr>
<tr>
<td>CRID</td>
<td>Customer Registration ID</td>
</tr>
<tr>
<td>IV-MTR</td>
<td>Informed Visibility Mail Tracking &amp; Reporting</td>
</tr>
<tr>
<td>MID</td>
<td>Mailer ID</td>
</tr>
<tr>
<td>MSP</td>
<td>Mail Service Provider</td>
</tr>
<tr>
<td>USPS®</td>
<td>United States Postal Service®</td>
</tr>
</tbody>
</table>
## IV Solutions Center

<table>
<thead>
<tr>
<th><strong>Telephone</strong></th>
<th>1-800-238-3150, Option #2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email</strong></td>
<td><a href="mailto:InformedVisibility@usps.gov">InformedVisibility@usps.gov</a></td>
</tr>
</tbody>
</table>
Additional resources are available on the IV-MTR PostalPro™ page.

Available resources include the following:

- IV Mail Tracking & Reporting User Guide
- IV BSA Instructions
- IV Mail.XML Guide
- IV External Facing Data Dictionary
Additional information about the BCG is available on the BCG Support page.

The BCG Navigation Guide may be particularly helpful. The Guide provides an overview of the BCG as well as instructions for navigating the site, managing your account, and performing BSA and BSA Delegate functions. The Guide is available in the upper-right corner of the Support page:
### Change History

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/21/2019</td>
<td>4.1</td>
<td>• Updated BCG screenshots and steps to match current user experience.</td>
</tr>
<tr>
<td>2/12/2019</td>
<td>4.0</td>
<td>• Updated instructions for receiving and entering the BSA authorization code.</td>
</tr>
<tr>
<td>7/12/2018</td>
<td>3.2</td>
<td>• Updated “IV-MTR Help Desk” to “IV Solutions Center”.</td>
</tr>
<tr>
<td>1/5/2018</td>
<td>3.1</td>
<td>• Updated instructions to log into IV.USPS.COM to include the new landing page.</td>
</tr>
</tbody>
</table>
| 12/14/2017 | 3.0     | • Reorganized to clearly identify the three steps for getting access.  
  • Updated to highlight importance of the user who should be the IV-MTR BSA being the first add the IV-MTR service.  
  • Updated instructions for obtaining an authorization code.  
  • Removed reference to RIBBS.  
  • Added hyperlinks for referenced documents.  
  • Updated instances of “IV” to be “IV-MTR”. |
| 9/7/2017   | 2.1     | • Added slides to help differentiate sub-sections.  
  • Added note about how to get information about the authorization code.  
  • Added information to help users determine which instructions to follow to add the IV-MTR service.  
  • Updated IV-MTR Resources slide.  
  • Added BCG Resources slide. |
## Change History

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Description</th>
</tr>
</thead>
</table>
| 4/2/2017| 2.0     | • Updated to reflect that the IV-MTR service is no longer part of the core suite of services and to align with content in the IV Mail Tracking & Reporting User Guide.  
• Added **Acronyms** slide and added content to **Additional Information** section. |
| 9/8/2016| 1.0     | Initial version                                                             |