



INFORMED VISIBILITY®

Provisioning Enterprise
Payment (EPS) and Package
Platform (PPC) Data

v1.12, April 26, 2022



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Welcome to this guide for **Provisioning Enterprise Payment System (EPS) and Package Platform Concept (PPC) Data** through the **Informed Visibility® Mail Tracking & Reporting (IV®-MTR)** application.

This guide provides information about:

- The IV-MTR application
- Setting up your IV-MTR account to receive EPS/PPC data
- Modifying and deleting your EPS/PPC queries
- Data file conventions and characteristics
- [Troubleshooting resources](#), including tutorial videos, detailed documentation, and the IV Solutions Center

It also provides high-level guidance for:

- Delegating data between Customer Registration IDs (CRIDs)
- Managing servers associated with your IV-MTR account

Informed Visibility® Mail Tracking & Reporting (IV®-MTR) is an application that allows mailers to receive the following types of Postal data:

- **Mail Tracking (Scan)**

- Event-based data that allows mailers to see where their mail is in the mailstream

- **Enterprise Payment System (EPS)**

- Payment data for:

- Stamps/Packaging
- PO Boxes
- Address Quality services
- Commercial Products & services
- Commercial Shipping Products

- **Package Platform Concept (PPC)**

- Physical and payment data for packages

- **Mail Quality Data (MQD)**

- Detailed error data from the Mailer Scorecard

- **Informed Delivery® Post-Campaign (IDPC) Detailed Data**

- Processing, opens, and click-throughs for Informed Delivery interactive campaigns

The EPS and PPC data available in IV-MTR is pass-through data that is not generated by IV-MTR itself

- Please see the data dictionaries for information about the data provided in IV-MTR:
 - [EPS Data Dictionary](#)
 - [PPC Data Dictionary](#)

EPS and PPC data in IV-MTR is available through a data feed*

- Data feeds are subscriptions that allow you to receive data at intervals you select

EPS/PPC Data Feeds:

- Provide data from the current date forward
 - Historical EPS and PPC data is currently unavailable in IV-MTR
- Produce files that can be sent to a server or downloaded online

**EPS/PPC data is currently unavailable as a One-Time Query in IV-MTR.*

The data feed output files are described in the table below.

File Format	Delimited (Importable into Excel)
Description	Text file that allows you to specify the delimiter character
Available Delivery Methods	Secure File Transfer Protocol (SFTP) server* Online download

Delimited files are easily imported into Microsoft Excel. Instructions for completing this task can be found on the [Microsoft Office Help Site](#) or in the [IV-MTR User Guide](#).

Detailed information about the output files, including naming conventions and formatting information, is provided in the [File Characteristics & Conventions appendix](#).

**If using SFTP, be sure to add the IV-MTR-specific IP addresses to your server firewall to ensure your system can receive data from IV-MTR. The IV-MTR IP addresses are available from the [IV Solutions Center](#).*

To receive EPS/PPC data through IV-MTR, you need:

1. A [Business Customer Gateway \(BCG\)](#) account
2. IV-MTR privileges (requested and granted through the BCG)
3. EPS/PPC privileges (requested and granted through the BCG*)
4. A Business Service Administrator (BSA) to activate your CRID(s) in IV-MTR

Detailed instructions for completing these steps are available in the [Applying for Access to IV-MTR](#) training and [IV-MTR User Guide](#) document.

Before proceeding, users must verify they have the correct level of access to create data feeds.

- **Only BSAs, BSA Delegates, and users that have been granted Subscription Manager roles can create and manage data feeds.**

- By default, all users can view existing data feeds.

For more information on the user levels and roles in IV-MTR, please see the [IV-MTR User Guide](#).

**EPS privileges are requested using the instructions [here](#). PPC privileges are part of the core suite of services users receive when signing up for BCG.*

The IV-MTR application allows you to access and manage EPS and PPC data for your organization. There are some special scenarios to consider before setting up your data feed(s).

Want to share visibility of your EPS/PPC data with another CRID?

- If your organization has several CRIDS of your own that you would like to track through one account, OR if your organization manages IV-MTR data for other organizations, use the IV-MTR feature of Data Delegation.
- See the [Data Delegation appendix](#) for more information.

Only want to share your EPS/PPC data?

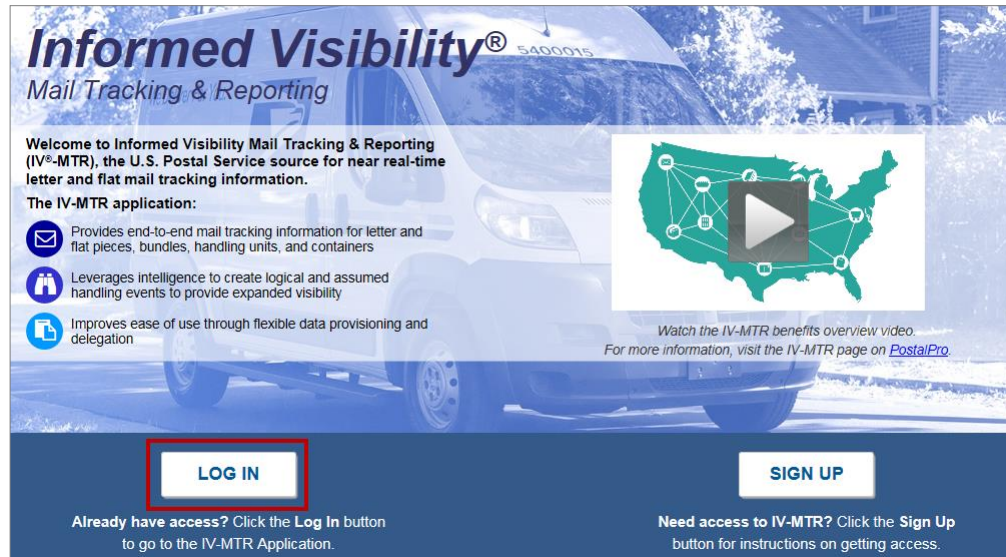
- If your organization would like to delegate its EPS/PPC data information to a third party (such as a mail service provider) instead of directly accessing and managing the EPS/PPC information itself, it may not be necessary to register for the IV-MTR service.*
- Contact the [IV Solutions Center](#) for more information.

**Note that BCG registration will still be required.*

Creating an EPS or PPC Data Feed

Option 1: Directly

1. Go to <https://iv.usps.com>.
2. Click **Log In** and enter your credentials.



Informed Visibility® 5400015
Mail Tracking & Reporting

Welcome to Informed Visibility Mail Tracking & Reporting (IV-MTR), the U.S. Postal Service source for near real-time letter and flat mail tracking information.

The IV-MTR application:

- Provides end-to-end mail tracking information for letter and flat pieces, bundles, handling units, and containers
- Leverages intelligence to create logical and assumed handling events to provide expanded visibility
- Improves ease of use through flexible data provisioning and delegation

Watch the IV-MTR benefits overview video.
For more information, visit the IV-MTR page on [PostalPro](#).

LOG IN **SIGN UP**

Already have access? Click the **Log In** button to go to the IV-MTR Application.

Need access to IV-MTR? Click the **Sign Up** button for instructions on getting access.

Option 2: Through the BCG

1. Log into <https://gateway.usps.com>.
2. Go to **Mailing Services > Informed Visibility**.
3. Click **Go to Service**.



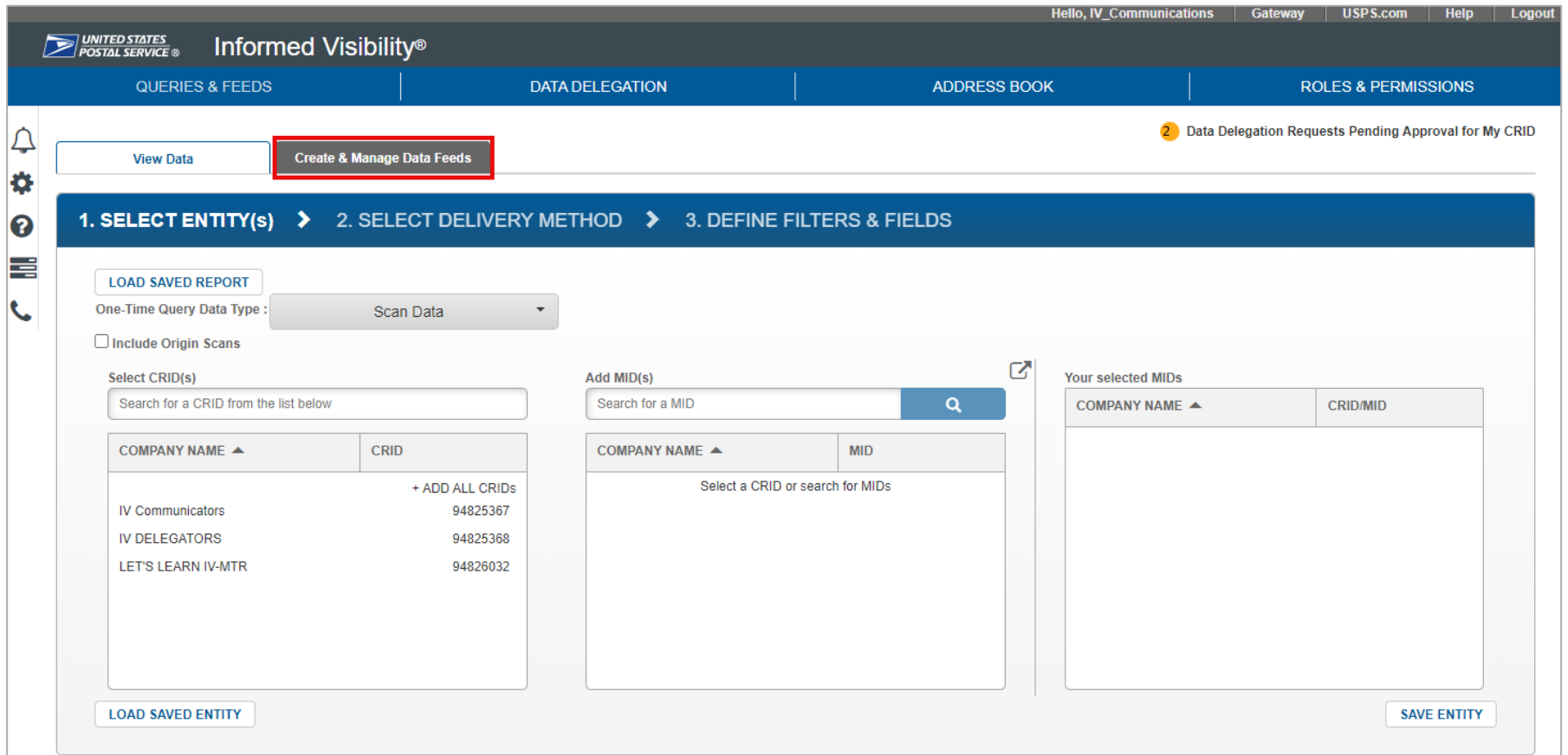
Informed Visibility [more info >](#)

Intelligent Mail Small Business (IMsb) Tool [more info >](#)

Go to Service

When you log in to IV-MTR, the homepage (the **Queries & Feeds** page) appears.

EPS and PPC data is available through a data feed. To begin setting up a data feed, click the **Create & Manage Data Feeds** tab.



The screenshot shows the 'Informed Visibility' web application interface. At the top, there is a navigation bar with the USPS logo and the text 'UNITED STATES POSTAL SERVICE®'. The main navigation menu includes 'QUERIES & FEEDS', 'DATA DELEGATION', 'ADDRESS BOOK', and 'ROLES & PERMISSIONS'. The 'Create & Manage Data Feeds' tab is highlighted with a red box. A notification banner at the top right indicates '2 Data Delegation Requests Pending Approval for My CRID'. The main content area is divided into three steps: '1. SELECT ENTITY(S)', '2. SELECT DELIVERY METHOD', and '3. DEFINE FILTERS & FIELDS'. Under '1. SELECT ENTITY(S)', there is a 'LOAD SAVED REPORT' button, a 'One-Time Query Data Type' dropdown set to 'Scan Data', and an 'Include Origin Scans' checkbox. Below this, there are two search boxes: 'Select CRID(s)' and 'Add MID(s)'. The 'Select CRID(s)' search box contains a table with the following data:

COMPANY NAME ▲	CRID
+ ADD ALL CRIDs	
IV Communicators	94825367
IV DELEGATORS	94825368
LET'S LEARN IV-MTR	94826032

The 'Add MID(s)' search box is currently empty with the text 'Select a CRID or search for MIDs'. To the right, there is a 'Your selected MIDs' section with a table header:

COMPANY NAME ▲	CRID/MID

At the bottom of the interface, there are buttons for 'LOAD SAVED ENTITY' and 'SAVE ENTITY'.

The Create & Manage Data Feeds screen appears. There are two sections at the top of this page:

- The **Your Feeds** section on the left displays existing data feeds. Here you can view or modify the details of a data feed and view or retrieve a feed's output history.
 - This area is viewable by all users.
- The **Create a New Feed** section on the right is where you create a new data feed.
 - This area is only viewable to BSAs, BSA Delegates, or Subscription Managers.

QUERIES & FEEDS
DATA DELEGATION
ADDRESS BOOK
ROLES & PERMISSIONS

View Data

Create & Manage Data Feeds

2 Data Delegation Requests Pending Approval for My CRID

Your Feeds

Search

Feed Name ▲	Entity Name	Mail Object Type	Target	File Format	Frequency	Active	# of Failed Files	Output History	Details
Daily Scan Data		Piece	N/A	DELIMITE...	1 Day(s)	Active	-		
MQD 4 hrs_CRID...		Mail Quality...	N/A	DELIMITE...	Daily	Active	-		
MQD 4 hrs_CRID...		Mail Quality...	N/A	DELIMITE...	Daily	Active	-		
MQD 4 hrs_CRID...		Mail Quality...	N/A	DELIMITE...	Daily	Active	-		
PPC_CRID94825...		Package	N/A	DELIMITE...	4 Hour(s)	Active	-		

Create a New Feed

Subscription Owner CRID

94825367 (IV COMMUNICATORS) ▼

Feed Data Type

Select ▼

File Format

Delimited File ▼

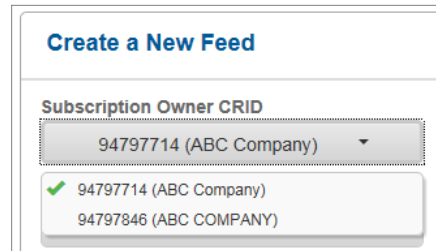
Delimiter **Multi-value Delimiter**

Comma ▼

N/A ▼

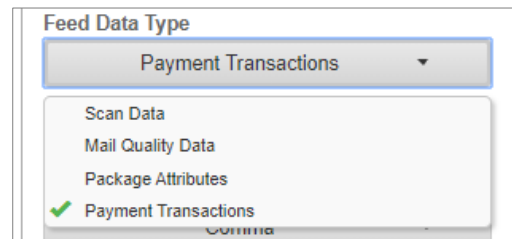
To create a data feed, locate the **Create a New Feed** section.

1. In the **Subscription Owner CRID** section, select the CRID the data feed will “belong to”
 - Use the CRID whose IV-MTR BSA, BSA Delegates, and Subscription Managers will be responsible for maintaining the data feed in the future
 - The CRID selected will impacts what entities are available to select in the next screen



The screenshot shows a form titled "Create a New Feed". Under the heading "Subscription Owner CRID", there is a dropdown menu currently displaying "94797714 (ABC Company)". Below the dropdown, a list of options is shown: "94797714 (ABC Company)" with a green checkmark, and "94797846 (ABC COMPANY)".

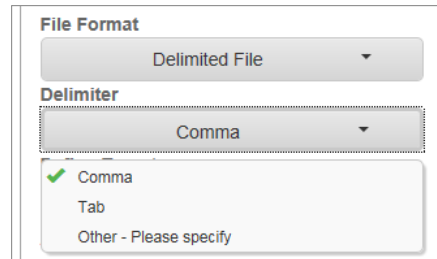
2. In the **Feed Data Type** section, choose the appropriate data type:
 - **EPS** = Payment Transactions
 - **PPC** = Package Attributes



The screenshot shows a dropdown menu titled "Feed Data Type". The selected option is "Payment Transactions". Below the dropdown, a list of options is shown: "Scan Data", "Mail Quality Data", "Package Attributes", and "Payment Transactions" with a green checkmark.

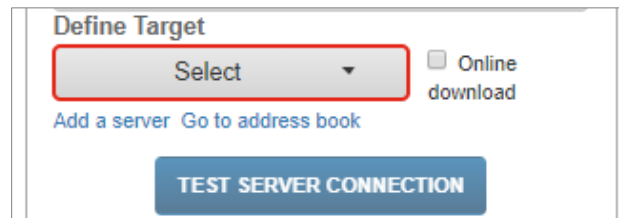
Note: If you do not see the desired data type in the drop down menu, you do not have the necessary privileges from BCG. See the [Getting Started](#) slide for information about requesting EPS and PPC privileges.

3. The **File Format** section allows you to choose the output file type. Currently, EPS and PPC data feed outputs are only available as **Delimited** files, so that option is selected by default.
4. In the **Delimiter** section, you can customize the delimiter you would like. By default, Comma is selected. If you choose “Other”, a new field will appear where you can enter the desired character.



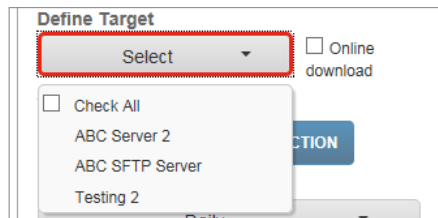
The screenshot shows a form with two sections. The first section, titled "File Format", has a dropdown menu with "Delimited File" selected. The second section, titled "Delimiter", has a dropdown menu with "Comma" selected. Below the dropdown is a list of options: "Comma" (with a green checkmark), "Tab", and "Other - Please specify".

5. In the **Define Target** section, select where to send the files. Available options are:
 - **Server** – IV-MTR will push the output files to an SFTP server you choose (see step 5.a)
 - **Online Download** – IV-MTR will display the output files within the IV-MTR application, where you can download them (see step 5.b)

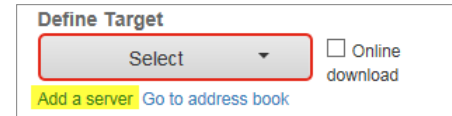


The screenshot shows a form titled "Define Target". It features a dropdown menu with "Select" highlighted by a red box. To the right of the dropdown is a checkbox labeled "Online download". Below the dropdown are two links: "Add a server" and "Go to address book". At the bottom of the form is a blue button labeled "TEST SERVER CONNECTION".

- a. Server download:** In the **Define Target** drop down, select the target server(s)
- The Define Target drop down is populated with servers already listed in your IV-MTR Address Book. If you need to add a new server to the list, click the **Add a server** link and follow the instructions in the [Adding a Server to the Address Book appendix](#).

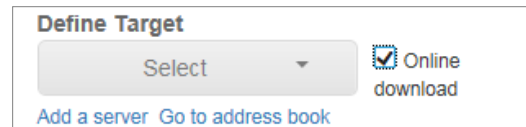


The screenshot shows the 'Define Target' section of a web interface. A dropdown menu is open, displaying a list of server names: 'ABC Server 2', 'ABC SFTP Server', and 'Testing 2'. The dropdown menu is highlighted with a red border. To the right of the dropdown is an unchecked checkbox labeled 'Online download'. Below the dropdown menu, there is a blue button with the text 'ACTION'.



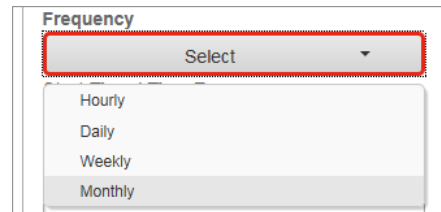
The screenshot shows the 'Define Target' section of a web interface. The dropdown menu is closed, and the text 'Select' is visible. To the right is an unchecked checkbox labeled 'Online download'. Below the dropdown menu, the text 'Add a server' is highlighted in yellow, followed by a blue link 'Go to address book'.

- b. Online download:** Check the box for **Online download**.
- This automatically greys out the Define Target option, as a target server is not needed for this option.



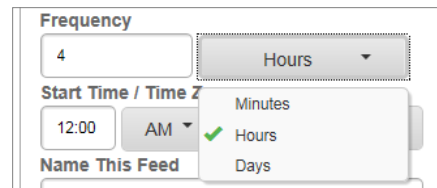
The screenshot shows the 'Define Target' section of a web interface. The dropdown menu is greyed out and contains the text 'Select'. To the right, the checkbox for 'Online download' is checked. Below the dropdown menu, there is a blue link 'Add a server' followed by another blue link 'Go to address book'.

6. The **Frequency** section allows you to choose how often you want to receive data from the feed. This section varies based on the data type:
- For EPS data:** In the **Frequency** drop down, select hourly, daily, weekly, or monthly.



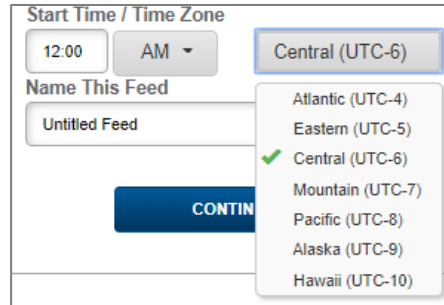
The screenshot shows a dropdown menu titled "Frequency". The menu is open, displaying four options: "Hourly", "Daily", "Weekly", and "Monthly". The "Monthly" option is highlighted with a grey background. A red dashed box highlights the "Select" button at the top of the dropdown.

- For PPC data:** In the **Frequency** field, enter a value and select minutes, hours, or days from the drop down menu.
 - By default, the frequency is set to every 4 hours. However, you can customize this from as often as every minute to as long as every 31 days.



The screenshot shows a form for configuring the frequency of a data feed. It includes a text input field containing the number "4", a dropdown menu set to "Hours", and a "Start Time / Time Zone" section with a time input field set to "12:00" and a time zone dropdown set to "AM". Below these fields is a "Name This Feed" label. A dropdown menu is open, showing three options: "Minutes", "Hours" (which has a green checkmark next to it), and "Days".

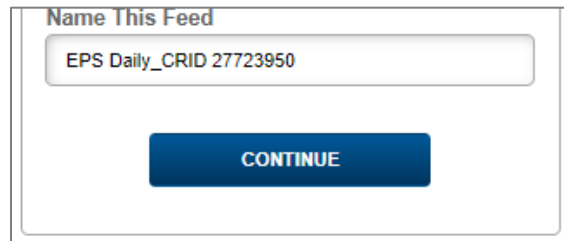
7. In the **Start Time / Time Zone** section, enter a start time, select AM or PM, and select a time zone. The data feed will be active once it is created and will send data according to the selected frequency and start time.



8. In the **Name This Feed** section, enter a name for the data feed. This is how your feed will display in the **Your Feeds** list.

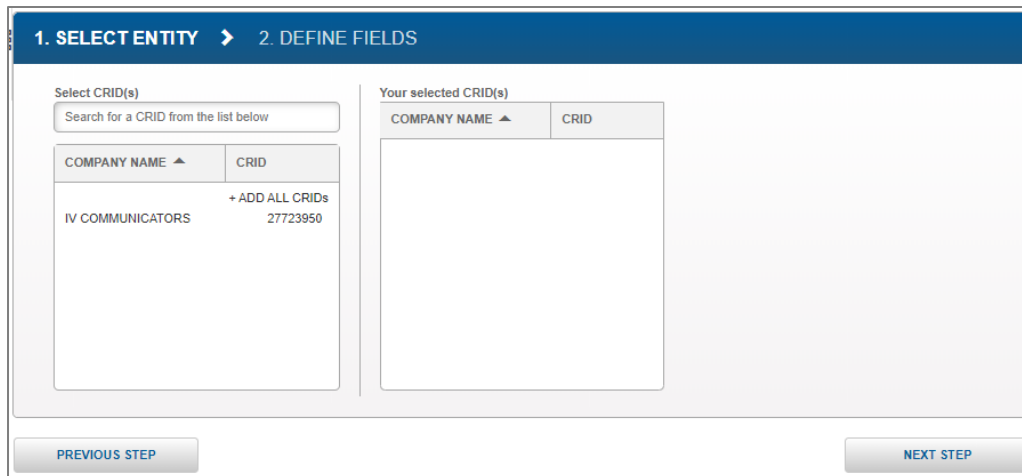
Note: The data type and sub-type, if applicable, are automatically appended to the feed name upon creation. For example, if you name the feed "Data Feed 1" and then select the Commercial Mailings data type on the next screens, the resulting feed name will be "Data Feed 1 Transactions Commercial Mailings".

8. Click **Continue**.



- The **Select Entity** screen appears. This area allows you to choose what CRIDs/Mailer IDs (MIDs) you will receive data for.
- The **Select CRID(s)** section displays the Subscription Owner CRID and any CRIDs delegated to it.
 1. Add CRID(s) using one of the following methods:
 - **To add all CRIDs:** click **+ADD ALL CRIDS**
 - **To add an individual CRID listed in the window:** Click the CRID entry
 - **To add an individual CRID from a long list:** Use the Search dialog to display the CRID, then click the desired CRID

The CRID(s) move(s) to the **Your selected CRIDs** section. Repeat this step as necessary until all desired CRIDs have been added.



The screenshot shows a web interface for selecting entities. At the top, there are two tabs: "1. SELECT ENTITY" (active) and "2. DEFINE FIELDS". Below the tabs, there are two main sections: "Select CRID(s)" and "Your selected CRID(s)".

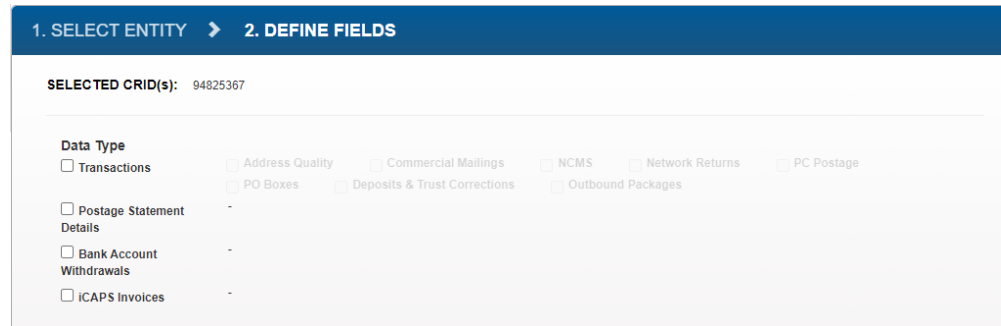
The "Select CRID(s)" section contains a search box with the placeholder text "Search for a CRID from the list below". Below the search box is a table with two columns: "COMPANY NAME" and "CRID". The table contains one row with the text "IV COMMUNICATORS" under "COMPANY NAME" and "27723950" under "CRID". To the right of the table is a button labeled "+ ADD ALL CRIDS".

The "Your selected CRID(s)" section contains a table with two columns: "COMPANY NAME" and "CRID". The table is currently empty.

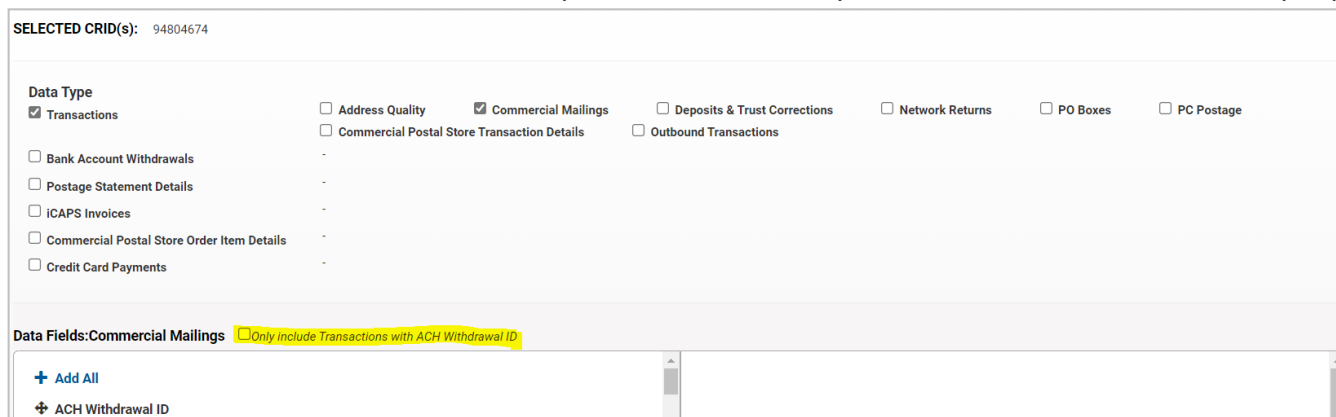
At the bottom of the interface, there are two buttons: "PREVIOUS STEP" on the left and "NEXT STEP" on the right.

2. Once all desired CRIDs have been added, click **Next Step**.

The **Define Fields** area appears. This screen allows you to choose the data types and exact data fields you would like to receive.



- In the **Data Type** section, check the box(es) for the data types you would like to receive. Once a type is selected, the sub-types (if available) will appear. As you make selections, **Data Fields** sections will appear below the Data Type section.
 - Note:** Each box you check will create a separate data feed. In the example below, a Transactions Commercial Mailings feed will be created.
 - ACH Withdrawal ID:** Users have the option to only include Transactions with ACH Withdrawal ID for the following data feed sub-types: **Commercial Mailings, Network Returns, and Outbound Transactions**. When the check box (highlighted below) is selected, Transaction data will be provisioned only if ACH Withdrawal ID is populated.



- **Statistical Quality Assessment (SQA):** The SQA data feeds are limited in frequency to either daily or monthly, depending on the feed type selected.
 - **SQA Package Level Details** – When selected, users will receive a message that states, “This data type can only be set to a Daily frequency. The previously selected frequency will be disregarded.”
 - **SQA Monthly Assessment, SQA Monthly Transaction** – When either is selected, users will receive a message that states, message “This data type can only be set to a Monthly frequency. The previously selected frequency will be disregarded.”

Data Type

Pricing Notification

Duplicate Packages - Outbound

Census Attributes

Duplicate Packages - Piece and Postage

Unused Labels

Final Notification

Unmanifested Packages

SQA Package Level Details - *This data type can only be set to a Daily frequency. The previously selected frequency will be disregarded.*

SQA Monthly Assessment

SQA Monthly Transaction


When users view or modify this data feed, the frequency will be automatically set to a read-only value of Daily or Monthly, depending on the SQA feed type selected.

Feed Configuration

Data Type
SQA Package Level Details

File Format
Delimited File


Delimiter
Comma

Define Target
jnthn usps server  Online download
[Add a server](#)
[Go to address book](#)

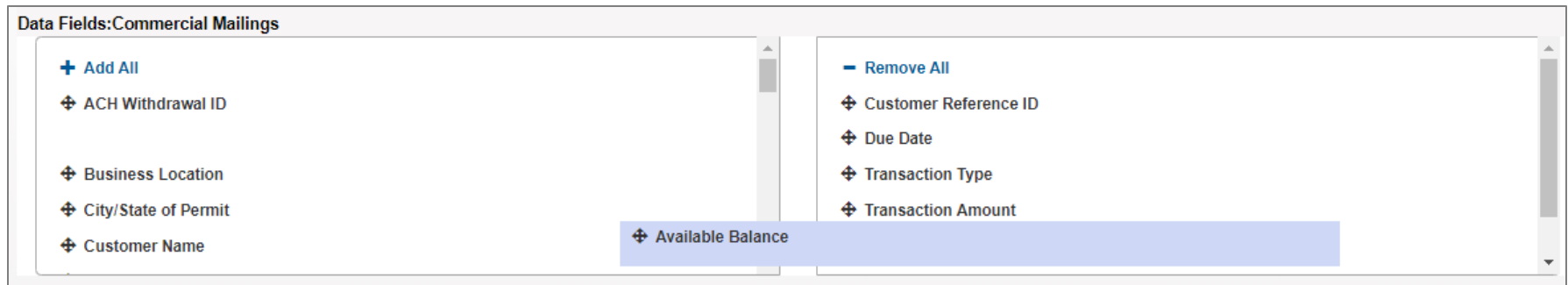
Frequency
Daily

Start Time / Time Zone
12:00 AM Central (UTC-6)

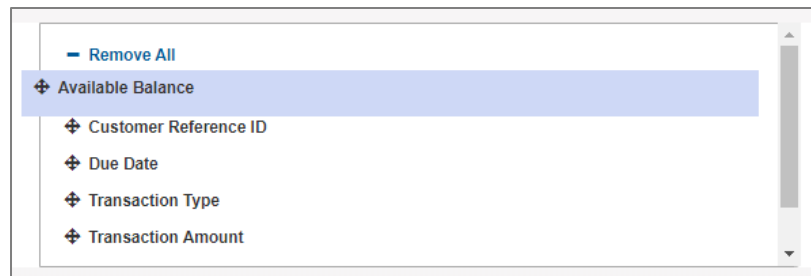
[TEST SERVER CONNECTION](#)



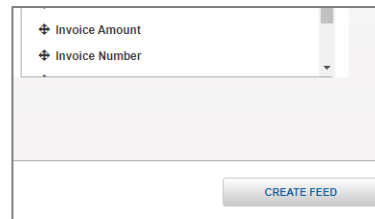
- In the **Data Fields** section, select the data fields to receive for each data type or sub-type.
 - The fields on the left are available to be added, and the fields on the right are already included in your data feed.
 - Drag** or **double-click** fields to move them from one side to the other. To add all available data fields, click **+ Add All**.
 - For details about the data fields themselves, please see the [EPS Data Dictionary](#) or the [PPC Data Dictionary](#).



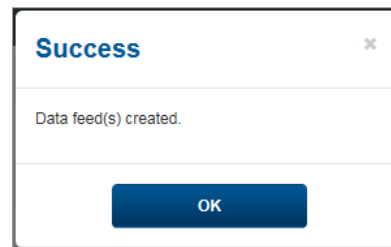
- Once you have selected the data fields to be included, arrange them in your preferred order by dragging and dropping them on the right side of the **Data Fields** section.



- Repeat the previous steps for each **Data Fields** section on the page.
- Once all the Data Fields sections have been set up, click **Create Feed**.



- A pop-up appears confirming creation of the feed(s).



- Close the window by clicking **OK** or the X icon.























Data feed creation is now complete. The new data feed(s) will appear in the Your Feeds table.


- For instructions on reviewing the feed's output files, see the next slide.
- For instructions on managing the data feed, including viewing and modifying its settings, see the [Managing Existing Data Feeds](#) section.

Data feeds are activated upon creation and begin delivering data according to the selected start time and frequency.

To retrieve files for a data feed, complete the following:

- On the **Queries and Feeds** page, click **Create & Manage Data Feeds**.
- On the **Create & Manage Data Feed** screen, locate the feed in the **Your Feeds** section.
- Click the **Output History** icon for the feed.

Your Feeds 									
Search <input type="text"/>									
Feed Name ▲	Entity Name	Mail Object Type	Target	File Format	Frequency	Active	# of Failed Files	Output History	Details
ABC Containers		Container	N/A	DELIMIT...	4 Hour(s)	Active	-		 
ABC Pieces	Saved...	Piece	N/A	Legacy...	15 Minute(s)	Active	-		 
EPS Data Trans...		Payment	N/A	DELIMIT...	Daily	Active	-		 
Mail Quality Data...		Mail Qual...	ABC SFTP Server	DELIMIT...	Daily	Active	-		 
Mail Quality Data...		Mail Qual...	ABC SFTP Server	DELIMIT...	Daily	Active	-		 
Mail Quality Data...		Mail Qual...	ABC SFTP Server	DELIMIT...	Daily	Active	-		 
Mail YMI Trans		Handlin...	ABC Web Service	MAIL YMI	1 Day(s)	Active	-		 


1 / 2
10 items per page
1 - 11 of 12 items

- The **Output History** page for the feed will appear. The output files will appear, including:
 - Delivery information (including a status and link to resend if a server is being used)
 - Download link, which allows you to manually download and view individual files
 - Print dialog, which prints the Output History (but not the files themselves)
 - Export As menu, which exports the Output History (but not actual files) CSV or PDF format

Output History ✕

Data feed files are saved for 7 days. PRINT EXPORT AS

Host	File Name	Total Scans	Most Recent Execution Attempt ▾	Delivery Success	Resend to Host	Download...
IV SFTP	fsb4p01456.p...	2837	Mon Apr 23 11:52:01 CDT 2018	Success	Resend	Download
IV SFTP	fsb4on3544.p...	2280	Mon Apr 23 10:50:13 CDT 2018	Success	Resend	Download
IV SFTP	fsb4om4540....	2421	Mon Apr 23 09:50:20 CDT 2018	Success	Resend	Download
IV SFTP	fsb4ol5752.pk...	2133	Mon Apr 23 08:51:26 CDT 2018	Success	Resend	Download
IV SFTP	fsb4ol1518.pk...	8814	Mon Apr 23 07:52:12 CDT 2018	Success	Resend	Download

⏪ ⏩ 1 / 33 ▶ ⏮ ⏭ 5 ▾ items per page 1 - 6 of 162 items

CLOSE

Managing Existing Data Feeds

Reviewing, Modifying, Disabling, and Deleting

Use the table below to assist in managing existing data feeds.

If you want to...	See...
View the details and settings of a data feed,	<u>Reviewing a Data Feed</u>
Modify an existing data feed,	<u>Modifying a Data Feed</u>
Temporarily turn off a data feed without permanently deleting it,	<u>Disabling a Data Feed</u>
Permanently delete a data feed,	<u>Deleting a Data Feed</u>
Troubleshoot an issue or question about IV-MTR,	<u>Troubleshooting Resources</u>

To view the settings of a data feed, complete the following steps:

1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.
3. The feed's **Details** page will appear, listing all the settings for the feed.

Search				
Frequency	Active	# of Failed Files	Output History	Details
4 Hour(s)	Active	-		
15 Minute(s)	Active	-		
Daily	Active	-		
Daily	Active	-		
Daily	Active	-		
Daily	Active	-		
1 Day(s)	Active	-		

1 - 11 of 12 items

PPC_CRID94825367 Final Notification

Last Update Date/Time: 11/04/2019 02:14:19 PM CST

[PRINT](#) [EXPORT](#)

Entities

Selected CRID(s)
CRID 94825367

Subscription Owner CRID

94825367

File Format

DELIMITED (delimiter: ,)

Target

N/A

Data Fields

Service Type Code
PIC
Mailer ID
IMPB
Destination ZIP Code

Filters

Data Type
Final Notification

Frequency

4 Hour(s)

Schedule Start Time

12:00 AM (US/Central)














Active Feed Indicator

Active

[CLOSE](#)

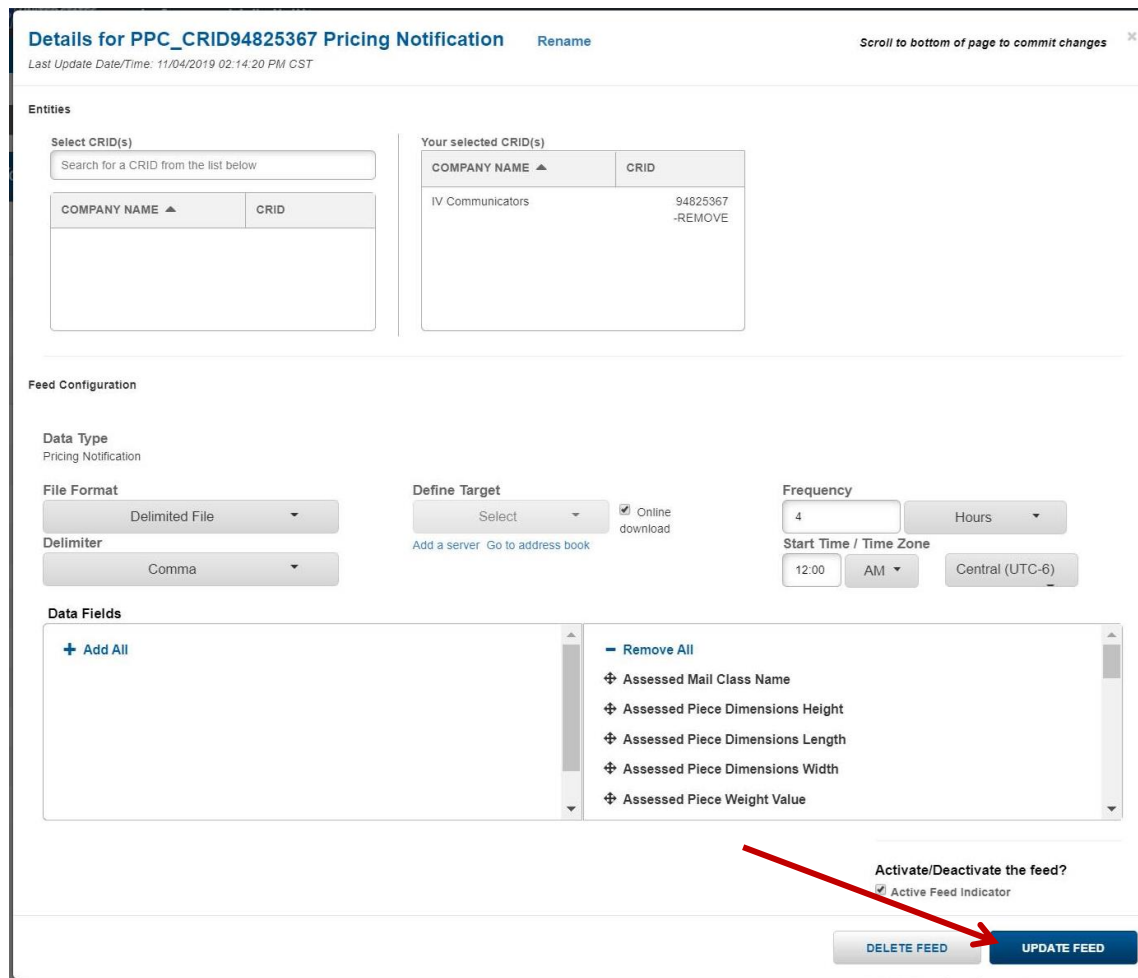
To modify the settings of a data feed, complete the following steps:

1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.

Your Feeds 						
Search <input type="text"/>						
...	File Format	Frequency	Active	# of Failed Files	Output History	Details
	DELIMITED (deli...	Daily	Active	-		 
	DELIMITED (deli...	Daily	Active	-		 
	DELIMITED (deli...	Monthly	Active	-		 
	DELIMITED (deli...	4 Hour(s)	Active	-		 

3. The feed's **Details** window appears. Make changes as needed.
4. Once your changes are complete, scroll to the bottom of the window and click **UPDATE FEED**.

IMPORTANT: To save changes, you must click **UPDATE FEED**.



Details for PPC_CRID94825367 Pricing Notification [Rename](#) Scroll to bottom of page to commit changes ×
Last Update Date/Time: 11/04/2019 02:14:20 PM CST

Entities

Select CRID(s)
Search for a CRID from the list below

COMPANY NAME ▲	CRID
----------------	------

Your selected CRID(s)

COMPANY NAME ▲	CRID
IV Communicators	94825367 -REMOVE

Feed Configuration

Data Type
Pricing Notification

File Format
Delimited File ▼

Define Target
Select ▼ Online download
Add a server Go to address book

Frequency
4 Hours ▼

Delimiter
Comma ▼

Start Time / Time Zone
12:00 AM ▼ Central (UTC-6) ▼

Data Fields

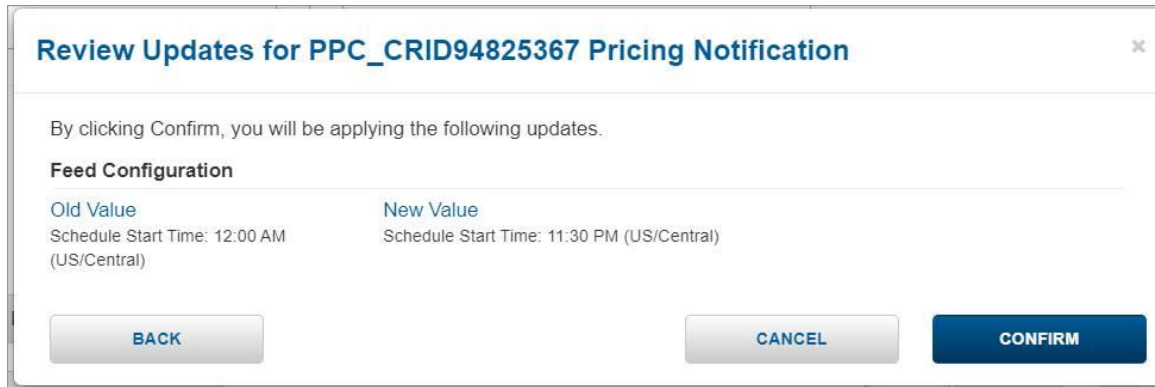
+ Add All

- Remove All
- ⊕ Assessed Mail Class Name
- ⊕ Assessed Piece Dimensions Height
- ⊕ Assessed Piece Dimensions Length
- ⊕ Assessed Piece Dimensions Width
- ⊕ Assessed Piece Weight Value

Activate/Deactivate the feed?
 Active Feed Indicator

[DELETE FEED](#) [UPDATE FEED](#)

5. A **Review Updates** screen will appear, listing the changes made and asking you to confirm they are correct.
 - To accept the changes, click **CONFIRM**.
 - To make changes, click **BACK**.
 - To cancel the update altogether, click **CANCEL**.



Review Updates for PPC_CRID94825367 Pricing Notification [X]

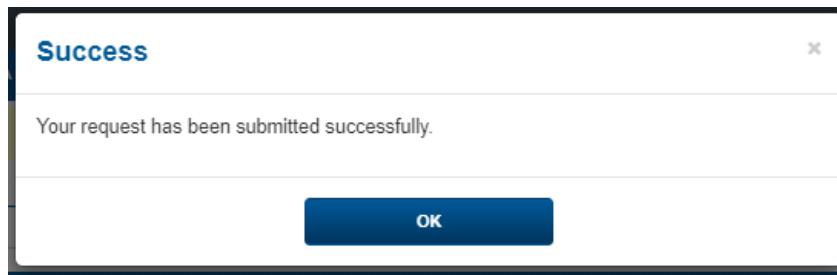
By clicking Confirm, you will be applying the following updates.

Feed Configuration

Old Value	New Value
Schedule Start Time: 12:00 AM (US/Central)	Schedule Start Time: 11:30 PM (US/Central)

[BACK] [CANCEL] [CONFIRM]

6. If you clicked Confirm, a success screen will appear, confirming the changes have been made. Click **OK**.



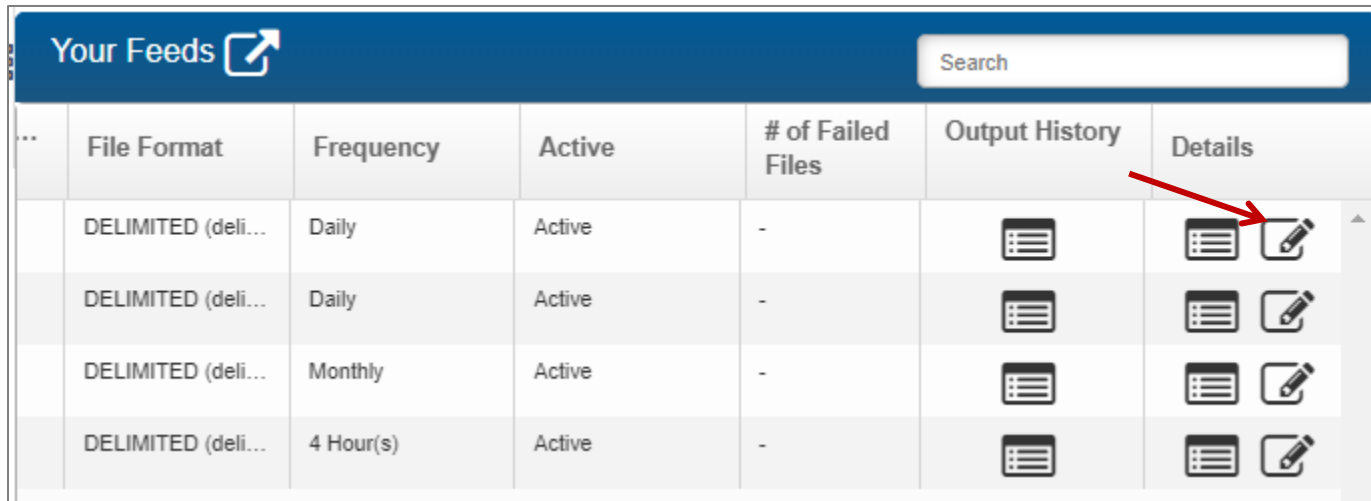
Success [X]














Your request has been submitted successfully.

[OK]

If you wish to temporarily turn off a data feed but do not want to permanently delete it, you can disable the data feed as follows:

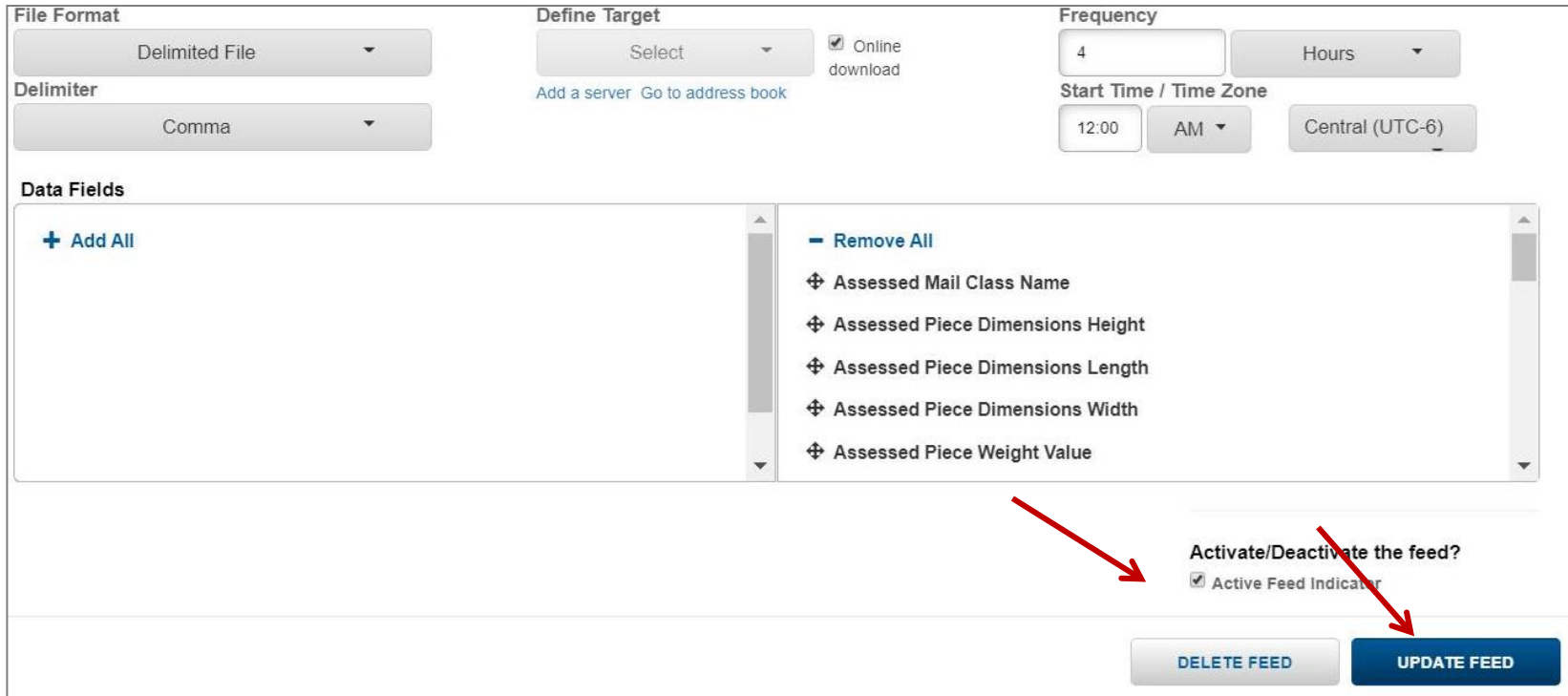
1. On the **Create & Modify Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.



Your Feeds 							Search	
...	File Format	Frequency	Active	# of Failed Files	Output History	Details		
	DELIMITED (deli...	Daily	Active	-				
	DELIMITED (deli...	Daily	Active	-				
	DELIMITED (deli...	Monthly	Active	-				
	DELIMITED (deli...	4 Hour(s)	Active	-				

- The feed's **Details** window appears. Scroll to the **Active/Deactivate the feed** section at the bottom of the page and **uncheck** the **Active Feed Indicator** box.
- Click **UPDATE FEED**.

IMPORTANT: To save changes, you must click **UPDATE FEED**.



The screenshot shows the configuration interface for a data feed. It includes sections for File Format (Delimited File), Delimiter (Comma), Define Target (Select), Frequency (4 Hours), and Start Time / Time Zone (12:00 AM Central (UTC-6)). The Data Fields section lists fields like Assessed Mail Class Name, Assessed Piece Dimensions Height, Assessed Piece Dimensions Length, Assessed Piece Dimensions Width, and Assessed Piece Weight Value. At the bottom, the 'Activate/Deactivate the feed?' section has a checked 'Active Feed Indicator' checkbox. Two red arrows point to the checkbox and the 'UPDATE FEED' button.

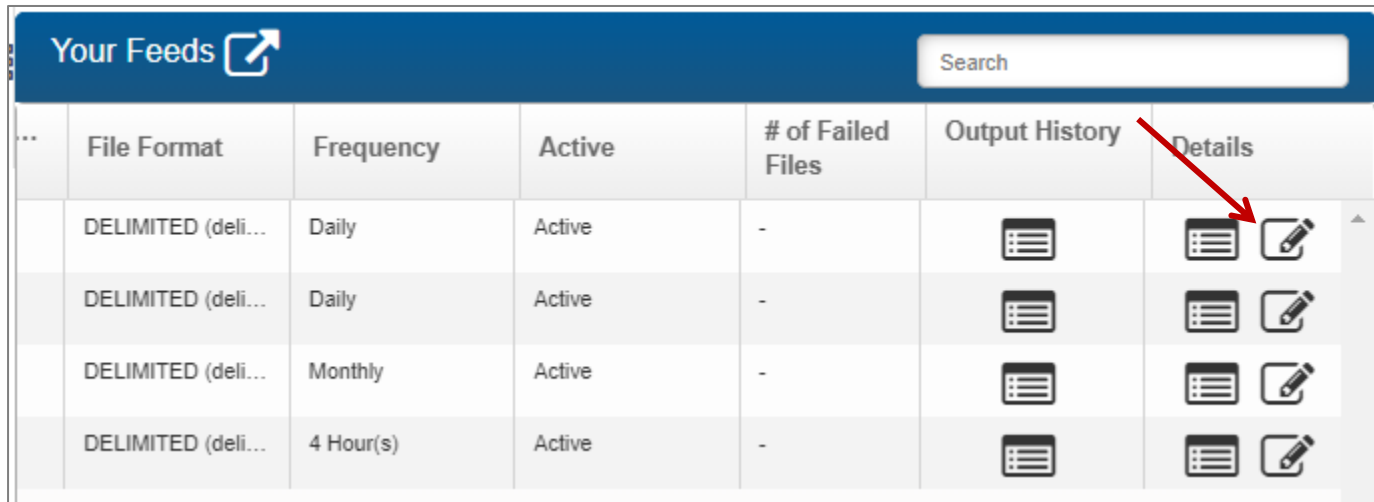
- The **Create & Manage Data Feeds** screen will appear. The feed will still be listed in the **Your Feeds** section, but will not retrieve new data until you re-activate it.













Use the delete functionality when you want to permanently delete a data feed.

IMPORTANT: Data Feed deletion cannot be undone.

To delete a data feed, complete the following:

1. On the **Create & Manage Data Feeds** screen, locate the feed in the **Your Feeds** window.
2. In the **Details** column, click the feed's **Modify** icon.



Your Feeds 							Search	
...	File Format	Frequency	Active	# of Failed Files	Output History	Details		
	DELIMITED (deli...	Daily	Active	-				
	DELIMITED (deli...	Daily	Active	-				
	DELIMITED (deli...	Monthly	Active	-				
	DELIMITED (deli...	4 Hour(s)	Active	-				

3. The feed's **Details** window appears. Scroll to the bottom of the screen and click **DELETE FEED**.

Details for PPC_CRID94825367 Pricing Notification [Rename](#) Scroll to bottom of page to commit changes ✕

Last Update Date/Time: 11/04/2019 02:14:20 PM CST

Entities

Select CRID(s)

Search for a CRID from the list below

COMPANY NAME ▲	CRID
----------------	------

Your selected CRID(s)

COMPANY NAME ▲	CRID
IV Communicators	94825367 -REMOVE

Feed Configuration

Data Type
Pricing Notification

File Format
Delimited File ▼

Delimiter
Comma ▼

Define Target
Select ▼ Online download
Add a server Go to address book

Frequency
4 Hours ▼

Start Time / Time Zone
12:00 AM ▼ Central (UTC-6) ▼

Data Fields

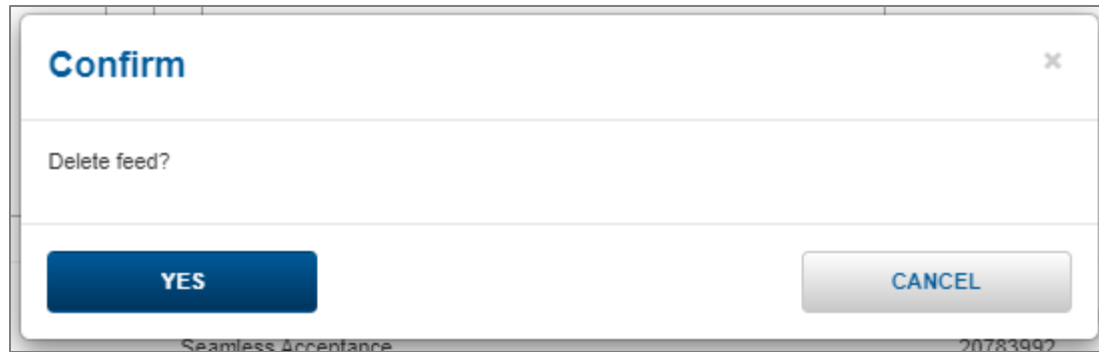
+ Add All

- Remove All
- Assessed Mail Class Name
- Assessed Piece Dimensions Height
- Assessed Piece Dimensions Length
- Assessed Piece Dimensions Width
- Assessed Piece Weight Value

Activate/Deactivate the feed?
 Active Feed Indicator

DELETE FEED **UPDATE FEED**

4. A **Confirm** popup will appear to confirm you want to delete the feed. Click **YES**.



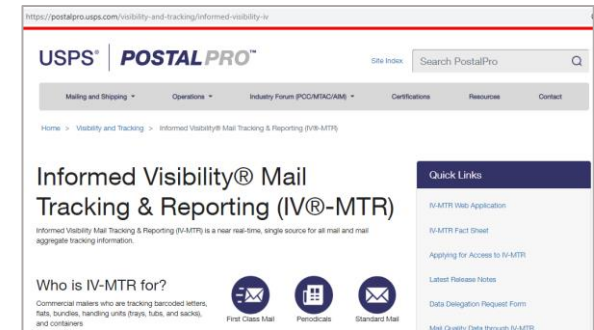
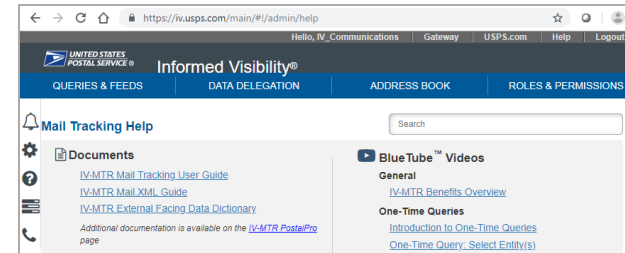
5. The **Create & Manage Data Feeds** screen will appear. The feed will no longer be listed in the **Your Feeds** section.

Troubleshooting Resources

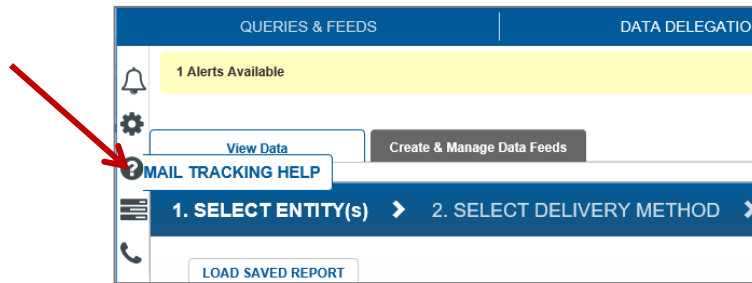
Where to Find Help When You Need It

IV-MTR help is available in three places:

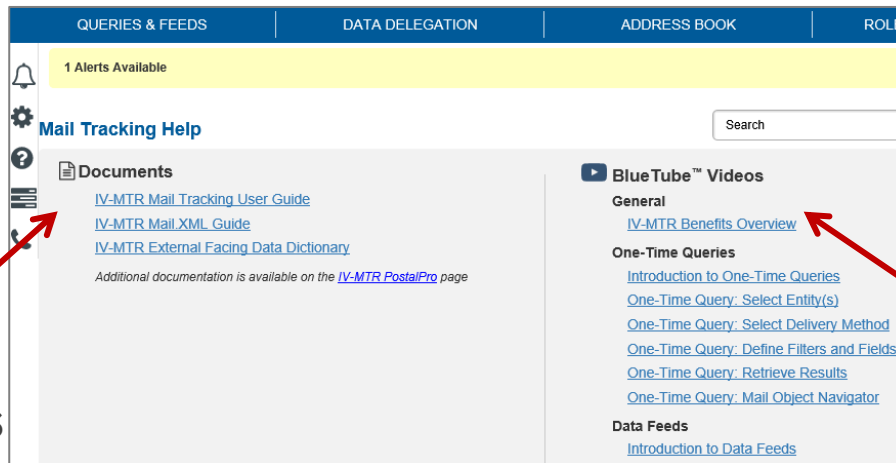
1. [IV-MTR Application](#) – the Help section of the IV-MTR website hosts the library of BlueTube® videos and provides links to select references on PostalPro
2. [PostalPro™ IV-MTR page](#) – a knowledge base with all IV-MTR documentation and resources
3. [IV Solutions Center® \(IVSC\)](#) – a dedicated group of Help Desk professionals who can assist with any questions



Access the IV-MTR Help Page from within the IV-MTR application by clicking the Question Mark bubble in the Widget Sidebar.



The IV-MTR Help page hosts:



PostalPro Document links that give you direct access to select PostalPro resources

BlueTube tutorial videos that provide a library of step-by-step instructional videos that walk you through using IV-MTR

PostalPro provides a wealth of information about IV-MTR.

- The [EPS through IV-MTR](#) page provides EPS-specific resources, including:
 - [EPS Data Dictionary](#) and [PPC Data Dictionary](#) (detailed information about the actual data received)
 - [EPS User Guide](#) (detailed information about EPS)
- The [IV-MTR PostalPro](#) page provides general information about IV-MTR, including:
 - [IV-MTR User Guide](#) (the most in-depth information about IV-MTR)
 - [Applying for Access](#) (instructions for setting up a new IV-MTR account)
 - [IV-MTR Orientation Training](#) (introduction to the navigation and layout of the application)
 - [Release Notes](#) (information about the most recent updates)
 - [EPS Data Delegation form](#) and [PPC Data Delegation form](#) (needed when coordinating data delegation with the IV Solutions Center)
 - [MTAC User Group 4 materials](#) (information about the open forum for USPS representatives and industry leaders to discuss mail visibility)

The IV Solutions Center is available to help answer any questions you have about IV-MTR.

InformedVisibility@usps.gov

1-800-238-3150, Option #2

7 AM to 5 PM CT, Monday through Friday

(closed USPS holidays)



Appendix A

Date	Version	Description
4/26/2022	1.12	<ul style="list-style-type: none"> Updated table of Report Names and Codes in Appendix B (slide 47).
3/26/2022	1.11	<ul style="list-style-type: none"> Added guidance for Statistical Quality Assessment (SQA), including new screenshots (slide 20).
8/28/2021	1.10	<ul style="list-style-type: none"> Added guidance for ACH Withdrawal ID and updated screenshot (slide 19). Updated screenshot to reflect new BCG user interface (slide 10).
11/13/2020	1.9	<ul style="list-style-type: none"> Expanded data delegation section.
9/11/2020	1.8	<ul style="list-style-type: none"> Updated screenshots (slides 19 and 63) showing new EPS data types
6/6/2020	1.7	<ul style="list-style-type: none"> Updated screenshots, including IV-MTR homepage (slide 10) and new data types (slide 19). Added IDPC references. Updated links to EPS Data Dictionary throughout.
4/25/2020	1.6	<ul style="list-style-type: none"> Updated Data Delegated to My CRID slides with new Data Type drop down Added Orientation Training link to PostalPro slide
1/10/2020	1.5	<ul style="list-style-type: none"> Updated shots for defining fields (slides 19, 56, & 63). Updated links to EPS Data Dictionary throughout.
12/2/2019	1.4.1	<ul style="list-style-type: none"> Removed notes about USPS-provided servers being filtered from Define Target drop down menus. Updated PostalPro link.
11/9/2019	1.4	<ul style="list-style-type: none"> Updated shots to remove Email Notification and USPS-provided server options. Reorganized content to enhance usability. Added introductory information and expanded resources section. Removed references to unavailable JSON outputs. Updated for clarity throughout.
6/28/2019	1.3	<ul style="list-style-type: none"> Updated shots on slide 13 for new EPS iCAPS data feed. Added Acronym Appendix

Date	Version	Description
2/1/2019	1.2	<ul style="list-style-type: none">• Added link to <i>Applying for Access to IV-MTR</i> document.• Updated instructions for entering the IV-MTR authorization code to reflect the BSA no longer needing to contact the IV Solutions Center for the code.• Added link to the <i>Package Platform Data Dictionary</i>.• Updated link to the <i>EPS IV-MTR Data Elements</i>.• Added PostalPro search term for Package Platform.
10/30/2018	1.1	<ul style="list-style-type: none">• Added hourly option for EPS data feed frequency.
7/24/2018	1.0	<ul style="list-style-type: none">• Initial version

Acronym / Abbreviation	Description
BCG	Business Customer Gateway
BSA	Business Service Administrator
CRID	Customer Registration ID
CSV	Comma Separated Value file
EPS	Enterprise Payment System
IDPC	Informed Delivery® Post-Campaign
IV®-MTR	Informed Visibility® Mail Tracking & Reporting
LF	Line Feed
MID	Mailer ID
MQD	Mai Quality Data
PDF	Portable Data File
PPC	Package Platform Concept
SFTP	Secure File Transfer Protocol
TXT	Text file

Appendix B

File Characteristics & Conventions

Delivery Method	Send to Server	Download
File Extension	TXT	TXT
Compression	Option for zipped or unzipped	Always zipped
File Naming Convention	YYYYMMDDhhmmss_CRID_AAA_BB_CC_DDDD.txt*	YYYYMMDDhhmmss_CRID_AAA_BB_CC_DDDD.txt*
Example File Name	20181207112728_94797714_EPS_AW_HR_2XY4.txt	20181207112728_94797714_EPS_AW_HR_2XY4.txt
Column Headers	Included	Included
Delimiter Character	Selected by user	Selected by user
End of Line Character	Line feed (LF) “\n”	Line feed (LF) “\n”
Escape Character	“\”	“\”
Handling of Large Number of Records	Multiple files created if more than 500,000 records	Multiple files created if more than 500,000 records
In-App Notification When Ready	Not available	Available
Displayed in Output History	Yes	Yes
Behavior if No Records	Blank file sent and appears in Output History	Blank file appears in Output History

* See the next slide for additional details.

File name:

- YYYYMMDDhhmmss_CRID_AAA_BB_CC_DDDD.txt

Where:

- YYYY = year
- MM = month
- DD = day
- hh = hour
- mm = minutes
- ss = seconds
- CRID = CRID number
- AAA = three letters for the system name (EPS or PPC)
- BB = two letters for the report name
- CC = two letters for the frequency
- DDDD = four alphanumeric characters representing the message ID (e.g., A2WU)

Frequency	Code
Hourly	HR
Daily	DA
Weekly	WK
Monthly	MN
Minutes	MI

Report Name	Code
Pricing Notification	PN
Final Notification	FN
Census Attributes	CA
Duplicate Packages – Outbound	PD
Duplicate Packages - Piece and Postage	MP
Unmanifested Packages	UP
Unused Labels	UL
SQA Monthly Transactions	ST
SQA Package Level Details	SD
SQA Monthly Assessment	SM
Manifest Error	ME
Manifest Auto-Correct	MA
Rejected Manifest Packages	MR
Postage Statement Details	PP
Bank Account Withdrawals	AW
Commercial Mailings	CM
Address Quality	AQ
PC Postage	PC
PO Boxes	PO
Network Returns	NR
Outbound Transactions	DO
Deposits & Trust Corrections	DP
Commercial Postal Store Transaction Details	CP
Commercial Postal Store Order Item Details	CO
iCAPS Invoices	CI
Credit Card Payments	CC

Appendix C

Adding Servers to the Address Book

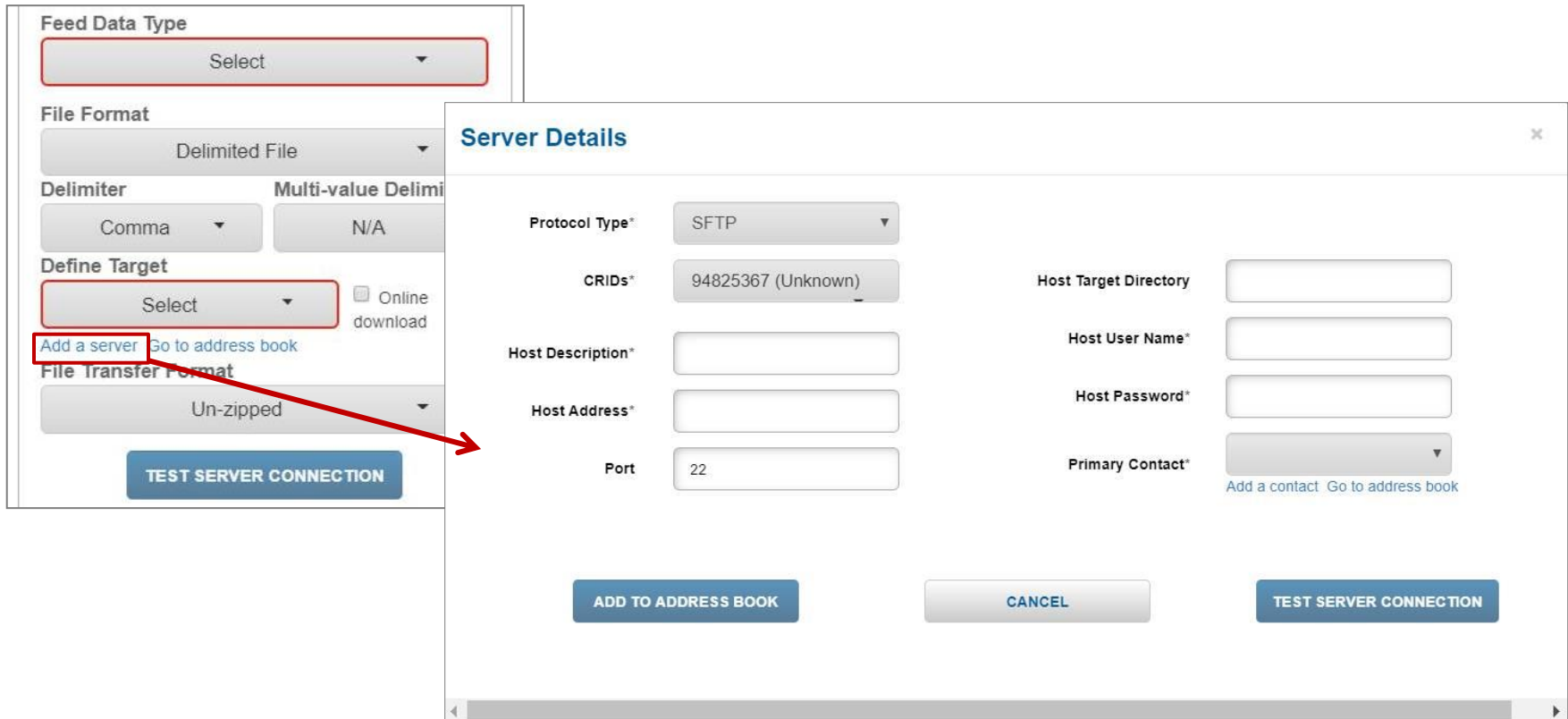
To send data to a server or web service, it must be added to the IV-MTR address book. You can add a server before or while creating a data feed.

For instructions on adding a server...	See...
While you are creating a data feed,	Adding a Server during Feed Setup
Before you begin creating a data feed,	Adding a Server before Feed Setup

If you would like more information about the IV-MTR Address Book, please see the [IV-MTR User Guide](#).

To add a server or web service *while creating* a data feed, under the **Define Target** drop-down, click **Add a Server**. A window opens for you to enter the server details.

Select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The new server or web service is added to your address book and is now available from the **Define Target** menu. [Continue with the data feed setup instructions.](#)



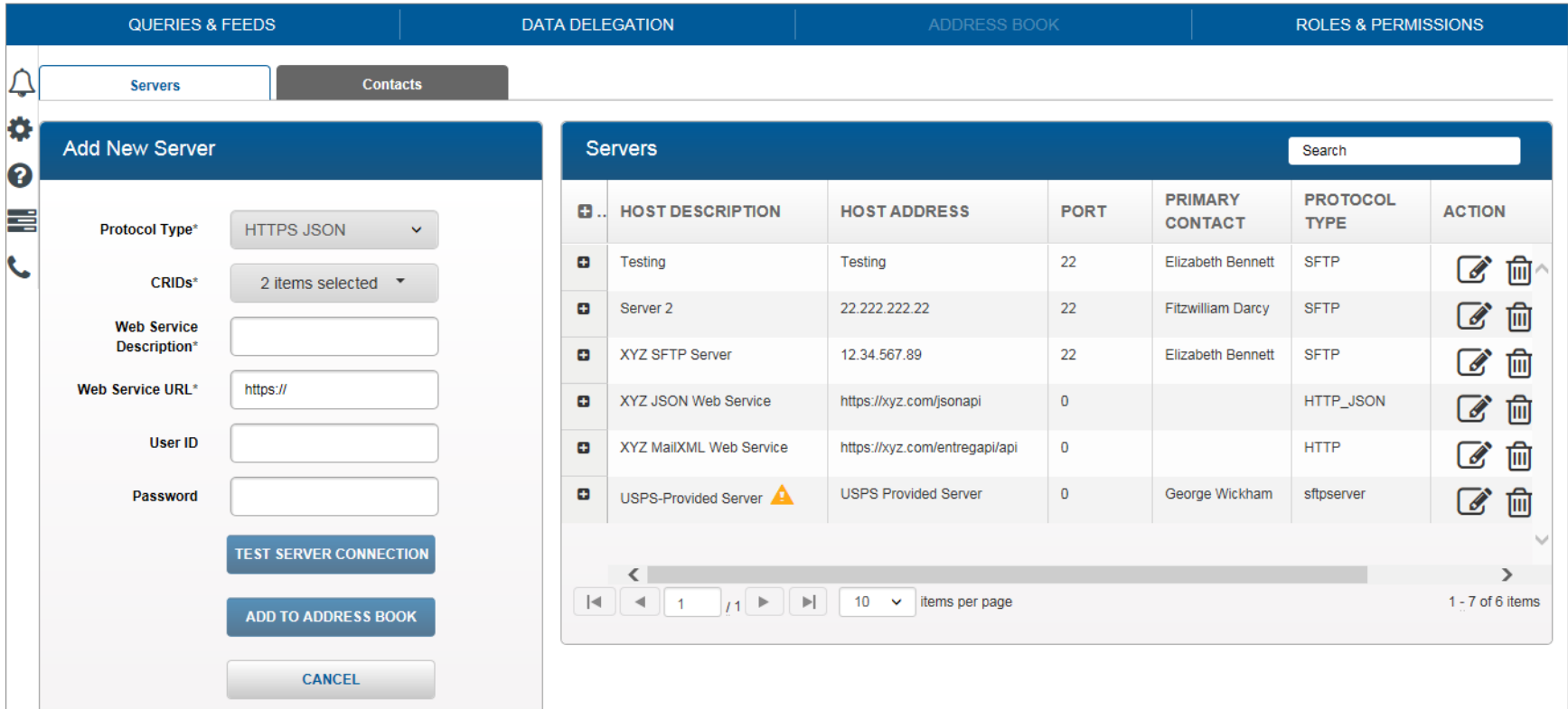
The screenshot shows the 'Server Details' dialog box with the following fields and options:

- Feed Data Type:** Select
- File Format:** Delimited File
- Delimiter:** Comma
- Multi-value Delimiter:** N/A
- Define Target:** Select (with 'Add a server' link and 'Go to address book' link)
- Online download:**
- File Transfer Format:** Un-zipped
- TEST SERVER CONNECTION** button

The 'Server Details' dialog box contains:

- Protocol Type*:** SFTP
- CRIDs*:** 94825367 (Unknown)
- Host Description*:** [Empty text box]
- Host Address*:** [Empty text box]
- Port:** 22
- Host Target Directory:** [Empty text box]
- Host User Name*:** [Empty text box]
- Host Password*:** [Empty text box]
- Primary Contact*:** [Dropdown menu with 'Add a contact' and 'Go to address book' links]
- ADD TO ADDRESS BOOK** button
- CANCEL** button
- TEST SERVER CONNECTION** button














To add a server or web service *before* creating a data feed, go to **Address Book > Servers**. On the left side of the screen, select the **Protocol Type** and complete the remaining fields. When you are finished, click **Add to Address Book**. The new server or web service is added to your address book and is now available from the **Define Target** menu when you create a data feed.



The screenshot displays the USPS Address Book interface. The top navigation bar includes 'QUERIES & FEEDS', 'DATA DELEGATION', 'ADDRESS BOOK', and 'ROLES & PERMISSIONS'. The 'ADDRESS BOOK' tab is active, and the 'Servers' sub-tab is selected. On the left, the 'Add New Server' form is visible, with the following fields:

- Protocol Type***: HTTPS JSON (dropdown)
- CRIDs***: 2 items selected (dropdown)
- Web Service Description***: (empty text field)
- Web Service URL***: https:// (text field)
- User ID**: (empty text field)
- Password**: (empty text field)

Below the form are three buttons: 'TEST SERVER CONNECTION', 'ADD TO ADDRESS BOOK', and 'CANCEL'. On the right, the 'Servers' table is displayed with the following data:

	HOST DESCRIPTION	HOST ADDRESS	PORT	PRIMARY CONTACT	PROTOCOL TYPE	ACTION
+	Testing	Testing	22	Elizabeth Bennett	SFTP	 
+	Server 2	22.222.222.22	22	Fitzwilliam Darcy	SFTP	 
+	XYZ SFTP Server	12.34.567.89	22	Elizabeth Bennett	SFTP	 
+	XYZ JSON Web Service	https://xyz.com/jsonapi	0		HTTP_JSON	 
+	XYZ MailXML Web Service	https://xyz.com/entregapi/api	0		HTTP	 
+	USPS-Provided Server 	USPS Provided Server	0	George Wickham	sftpserver	 

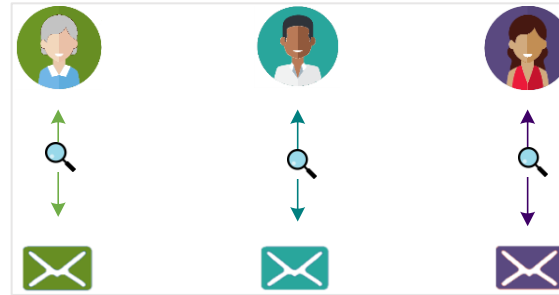
At the bottom of the table, there is a pagination control showing '1 / 1' items per page and '1 - 7 of 6 items'.

Appendix D

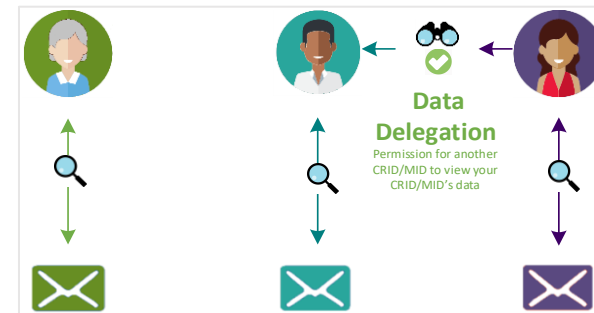
Data Delegation Overview

Data Delegation is a feature of IV-MTR that allows you to share and receive data with other CRIDs/MIDs and organizations.

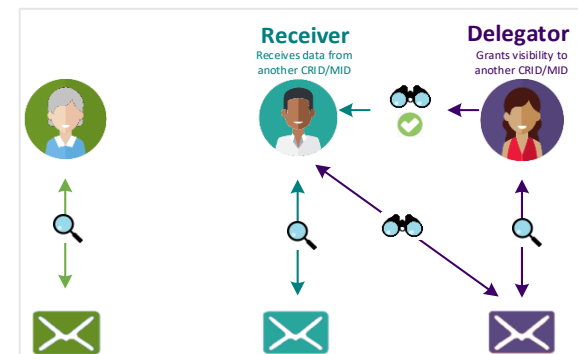
- In IV-MTR, each CRID has visibility of its own data.



- If you'd like to share data with another CRID, you can do so by creating a *data delegation*.



- The data delegation allows the receiving CRID to create data feeds with your data.



There are two roles in data delegation:

1. **Delegator:** The CRID that shares its data with another CRID or MID.
2. **Receiver:** The CRID that receives data from another CRID.

Data Delegation can be initiated by either a delegator or a receiver.

- Instructions for both methods are provided in this section.

Data can be shared either between CRIDs owned by the same organization (as a means of centralizing data), or between organizations (such as a Mail Owner and a Mail Service Provider).

If you have any questions about whether data delegation is right for you, please contact the [IV Solutions Center](#).

Data Delegation in IV-MTR hinges on the following:

- 1. Level of Delegation** – EPS and PPC data is delegated at the CRID-level.
 - This provides visibility of all MIDs – current **and future** – for a particular CRID.

- 2. Data Type Shared** – New data delegations must be created for each data type.
 - This ensures the CRID owner can control what data recipients are allowed to receive.
 - Having a delegation in place for one data type does not affect visibility of any other data types. There is no option for a blanket delegation of all data types.

Data Delegation in IV-MTR hinges on the following:

- 3. Discretion of Delegator** – Delegating CRIDs have final say on what visibility is shared.
 - Receivers can request the data and dates they prefer, but the delegator can modify any delegation at any time.
 - Receivers can be notified about modifications made to data delegated to them. See the [IV-MTR User Guide](#), section 12.4: Managing Notification Preferences.
 - If a new data type becomes available, the receiving party will need to submit a new data delegation form to receive that data type.
- 4. Manual Updating of Feeds/Reports with Delegated Data** – Delegated data is not automatically added to existing data feeds or saved reports.
 - After the receiver is granted visibility, they must update any existing data feeds or reports or create new feeds/saved reports manually.
 - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the receiver requested visibility of).

The IV-MTR application provides **a self-service data delegation area** that allows organizations with IV-MTR accounts to **share data without having to contact the Postal Service**.

- Instructions for doing this are provided in this section.
- Only BSAs, BSA Delegates, or Data Delegation Managers can set up delegations.

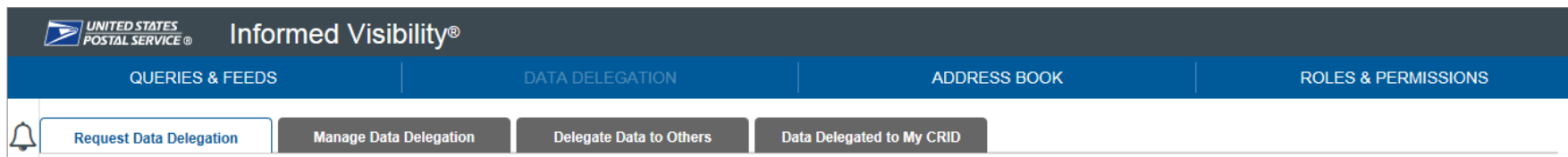
However, if one or both of the organizations **do not have access** to IV-MTR or **do not wish to set the delegation up** themselves, the **IV Solutions Center** can help facilitate the delegation.

- Please contact the [IV Solutions Center](#) for more information.

This appendix provides the essential instructions for setting up EPS/PPC-specific delegations.

- If you need more detailed information about Data Delegations at any time, see the [IV-MTR User Guide](#).

There are four tabs within the **Data Delegation** area of IV-MTR:



- 1. Request Data Delegation:** Allows you to **request visibility from another CRID**, view the history of your requests, and cancel pending requests.
 - Some functionality on this tab is restricted by user level.
- 2. Manage Data Delegation:** Allows you to **view the requests** you have received from other CRIDs for visibility of your data **and approve or deny them**. Also allows you to **view the full history of data delegations** for your CRID's data, including those created by your CRID's users, and **modify or delete** them as necessary.
 - This tab is restricted by user level (general users cannot view).
- 3. Delegate Data to Others:** Allows you to **delegate visibility** of your data to **another CRID**.
 - This tab is restricted by user level (general users cannot view).
- 4. Data Delegated to My CRID:** Allows you to **see the data currently delegated to your CRID** and **delete** any unwanted delegations.
 - Some functionality on this tab is restricted by user level.

To delegate or request EPS/PPC data, you will need the following:

- A BSA, BSA Delegate, or Data Delegation Manager user role
- Delegating CRID(s)
- Receiving CRID(s)
- Dates data will be shared
- IV-MTR service and EPS service (for EPS data) for your CRID
 - Receivers who do not have the EPS service will be unable to use EPS data, even if it is delegated to them.

Use the table below to proceed.

If you want to...	Proceed to...
Request data from another CRID,	Requesting Data Delegation
View data currently delegated to you,	Viewing Data Delegated to You
Delete data currently delegated to you,	Deleting Data Delegated to You
Delegate data to another CRID,	Delegating Data to Others
Review delegation requests you've received,	Reviewing Data Delegation Requests
Modify or delete data you are currently delegating,	Modifying Existing Delegations

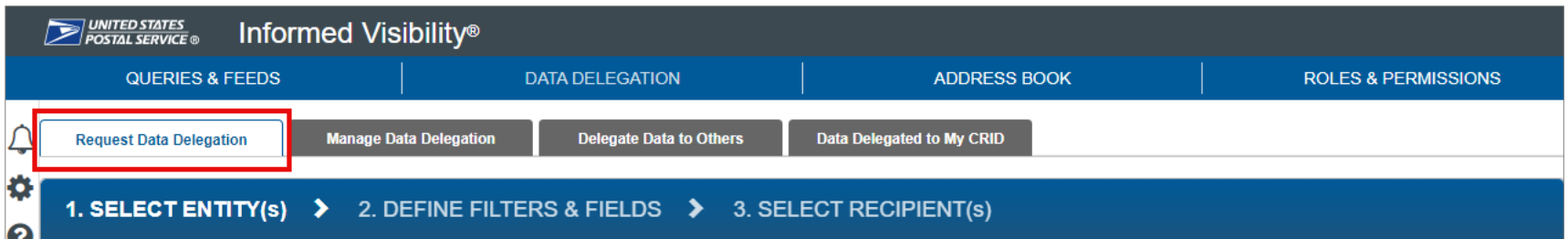
Requesting Data Delegation

(BSA, BSA Delegate, and Data Delegation Managers Only)

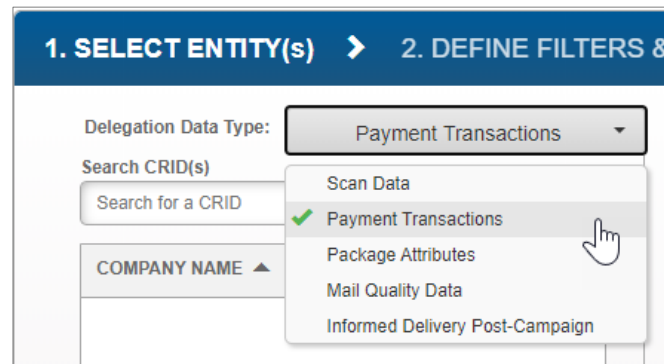
This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

Follow these steps to request data delegation:

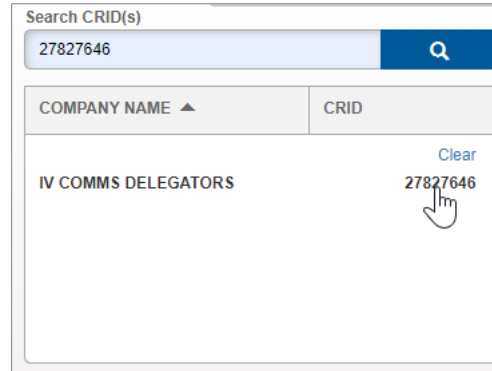
1. Log into IV-MTR and click the **Data Delegation** tab.
2. The Data Delegation area will appear, set to the **Request Data Delegation** tab.



3. In the **Delegation Data Type** dropdown, select the appropriate data type:
 - EPS = Payment Transactions
 - PPC = Package Attributes



- Use the **Search CRIDs** pane to locate and add the CRIDs you would like visibility for. For best results, use the full CRID.
 - Selected CRIDs will move from the Search CRID(s) pane to the Your selection(s) pane.



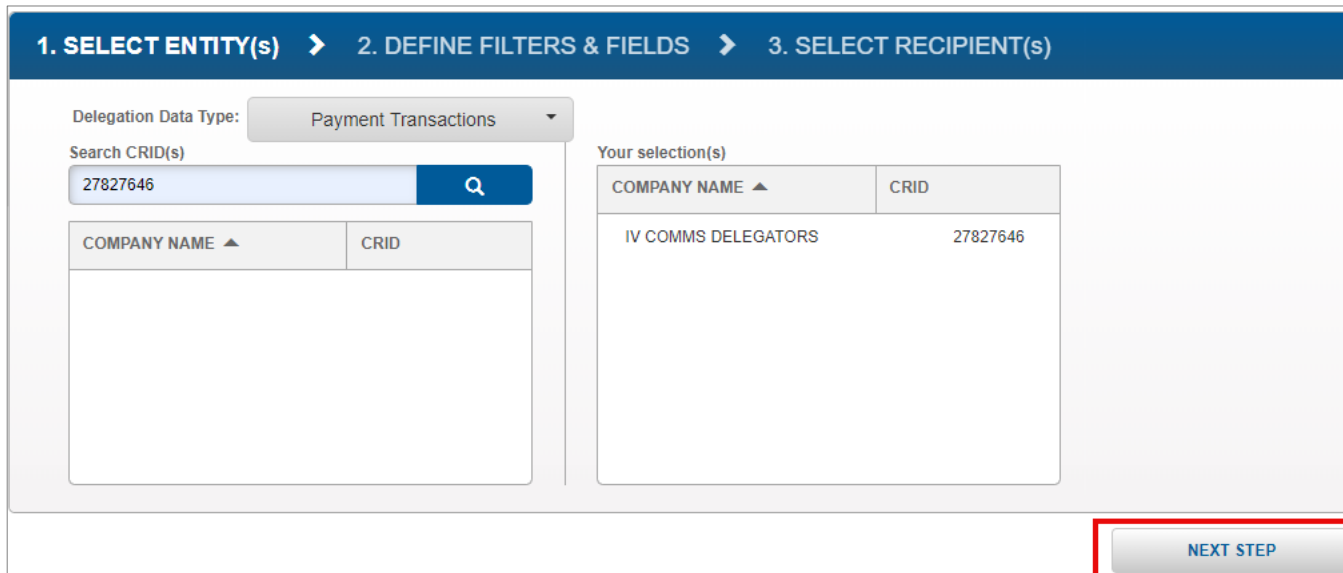
Search CRID(s)

27827646

COMPANY NAME ▲	CRID
IV COMMS DELEGATORS	27827646

Clear

- When you have finished adding CRIDs, click **NEXT STEP**.



1. SELECT ENTITY(s) > **2. DEFINE FILTERS & FIELDS** > **3. SELECT RECIPIENT(s)**

Delegation Data Type: Payment Transactions ▼

Search CRID(s)

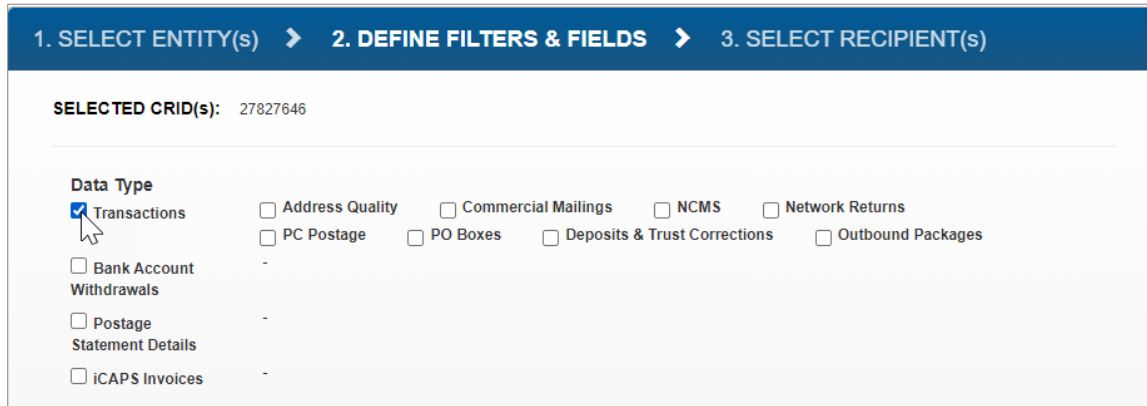
27827646

COMPANY NAME ▲	CRID
----------------	------

Your selection(s)

COMPANY NAME ▲	CRID
IV COMMS DELEGATORS	27827646

6. The Define Filters & Fields page will appear. Check the box(es) for the data types you would like to receive. Once a type is selected, the sub-types (if available) will appear.
- **Note:** Each box you check will create a separate delegation.



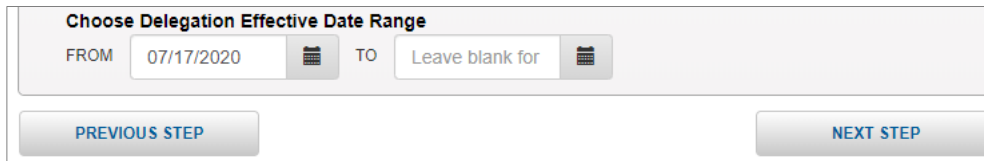
1. SELECT ENTITY(S) > 2. DEFINE FILTERS & FIELDS > 3. SELECT RECIPIENT(S)

SELECTED CRID(s): 27827646

Data Type

<input checked="" type="checkbox"/> Transactions	<input type="checkbox"/> Address Quality	<input type="checkbox"/> Commercial Mailings	<input type="checkbox"/> NCMS	<input type="checkbox"/> Network Returns
<input type="checkbox"/> Bank Account Withdrawals	<input type="checkbox"/> PC Postage	<input type="checkbox"/> PO Boxes	<input type="checkbox"/> Deposits & Trust Corrections	<input type="checkbox"/> Outbound Packages
<input type="checkbox"/> Postage Statement Details	-	-	-	-
<input type="checkbox"/> iCAPS Invoices	-	-	-	-

7. In the **Choose Delegation Effective Date Range** section, select the dates you would like visibility for.
- You cannot select dates in the past.
 - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the you request visibility for).

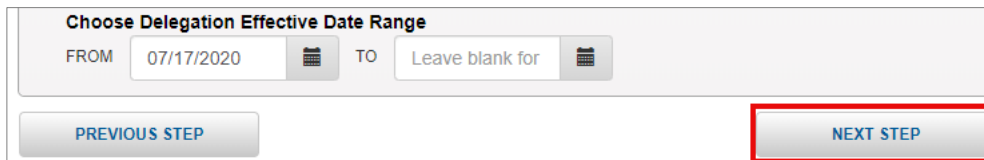


Choose Delegation Effective Date Range

FROM 07/17/2020 TO Leave blank for

PREVIOUS STEP NEXT STEP

8. When you have chosen your dates, click **NEXT STEP**.

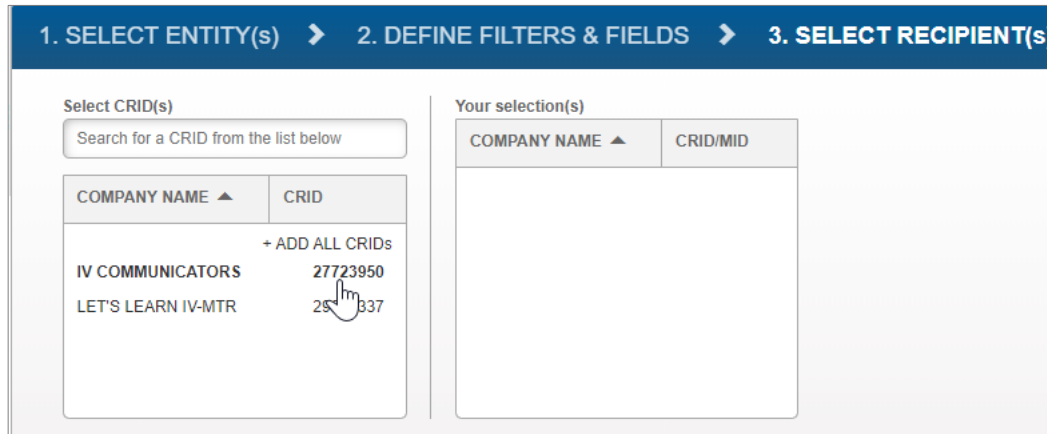


Choose Delegation Effective Date Range

FROM 07/17/2020 TO Leave blank for

PREVIOUS STEP NEXT STEP

8. The Select Recipient(s) screen will appear. Use the **Select CRID(s)** pane to select the CRIDs that will receive the data. Selected CRIDs will move from the Select CRID(s) pane to the Your selection(s) pane.



1. SELECT ENTITY(s) > 2. DEFINE FILTERS & FIELDS > 3. SELECT RECIPIENT(s)

Select CRID(s)

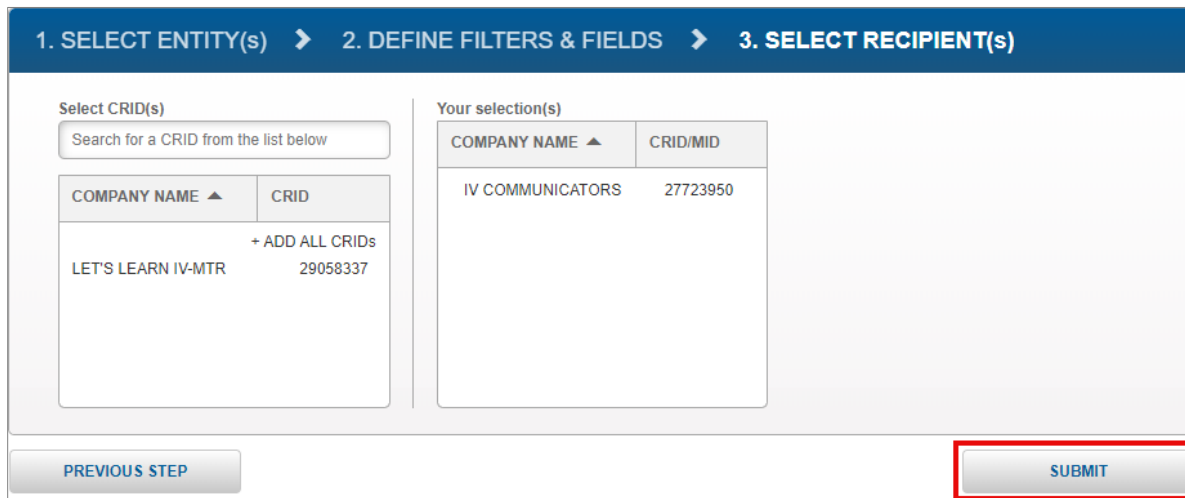
Search for a CRID from the list below

COMPANY NAME ▲	CRID
+ ADD ALL CRIDs	
IV COMMUNICATORS	27723950
LET'S LEARN IV-MTR	29058337

Your selection(s)

COMPANY NAME ▲	CRID/MID
----------------	----------

9. When you have finished selecting your CRIDs, click **SUBMIT**.



1. SELECT ENTITY(s) > 2. DEFINE FILTERS & FIELDS > 3. SELECT RECIPIENT(s)

Select CRID(s)

Search for a CRID from the list below

COMPANY NAME ▲	CRID
+ ADD ALL CRIDs	
LET'S LEARN IV-MTR	29058337

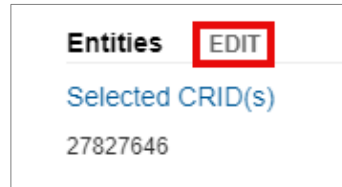
Your selection(s)

COMPANY NAME ▲	CRID/MID
IV COMMUNICATORS	27723950

PREVIOUS STEP

SUBMIT

10. A confirmation screen will appear. Review the details of your request.
- **If you need to make changes**, click the **EDIT** link next to the section that needs updates.

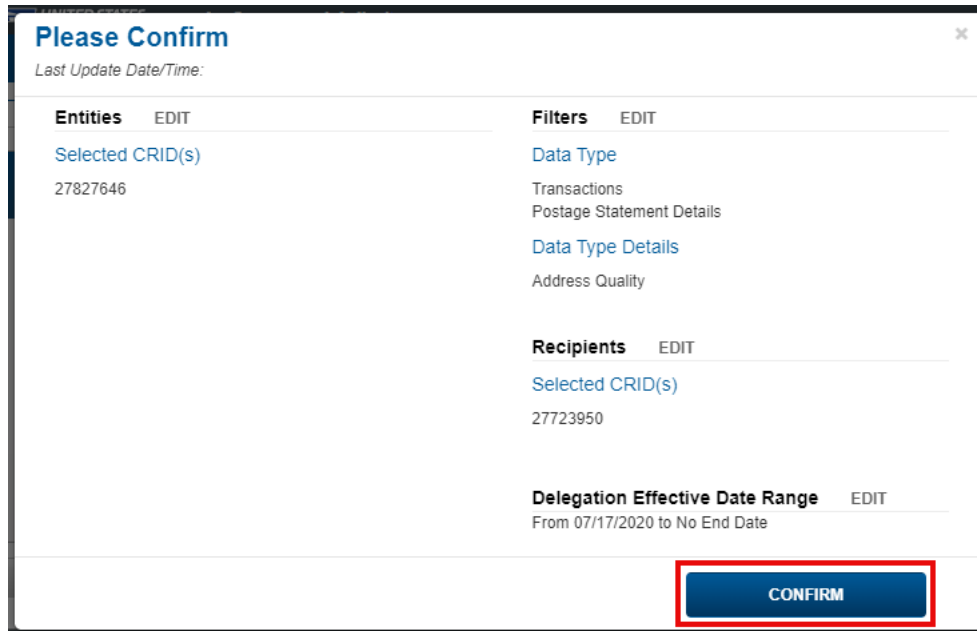


Entities [EDIT](#)

Selected CRID(s)

27827646

- **If your request is ready to submit**, click **CONFIRM**.



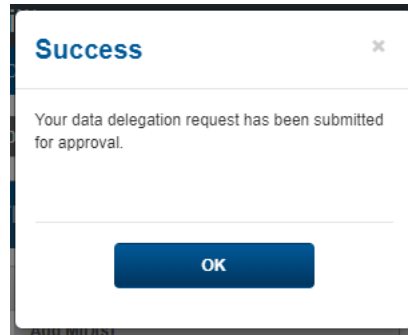
Please Confirm ×

Last Update Date/Time:

Entities EDIT	Filters EDIT
Selected CRID(s)	Data Type
27827646	Transactions
	Postage Statement Details
	Data Type Details
	Address Quality
	Recipients EDIT
	Selected CRID(s)
	27723950
	Delegation Effective Date Range EDIT
	From 07/17/2020 to No End Date

CONFIRM



11. A popup will appear, confirming your request has been submitted. Users of both the receiving and delegating CRIDs will be notified of the request according to their notification settings.













12. Your data delegation request is now complete and with the delegators for review.
 - **If you would like to review the status of your request**, see the next slide.
 - **If your request is approved and you would like to begin using the data:**
 - Add the delegated CRIDs to your existing EPS/PPC data feeds using the instructions [here](#).
 - Create a new EPS/PPC data feed using the instructions [here](#).

The Request History table lists all the delegation requests submitted by your CRID(s)/MID(s) and their statuses.

In this table, you can:

- **Determine a request's status** by locating its entry in the STATUS column
 - Note: If your delegation is marked as Pending for an extended period of time, contact the delegator or reach out to the [IV Solutions Center](#) for assistance.
- **Review the details** of a request by clicking its Details  icon.
- **Cancel a request** by clicking its Delete  icon.
 - **Note: Delegation requests cannot be modified** after they have been submitted. If you need to change something in a request, you must cancel the request and create a new one.

Request History											Search for CRID or MID
RECEIVING CRID ▲	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
94825367	IV Commu...	ALL	Payment	IV_Commun...	94825368	IV DELEGAT...	ALL	07/28/2020	07/28/202...	Request Pending	 
94825367	IV Commu...	ALL	Payment	IV_Commun...	94825368	IV DELEGAT...	ALL	07/28/2020	07/28/202...	Request Pending	 
94825367	IV Commu...	ALL	Payment	IV_Commun...	94825368	IV DELEGAT...	ALL	02/18/2020	02/18/202...	Request Cancel...	
94825367	IV Commu...	ALL	Container	IV_Commun...	94825368	IV DELEGAT...	ALL	06/22/2020	06/22/202...	Request Rejected	
94825367	IV Commu...	ALL	Bundle	IV_Commun...	94825368	IV DELEGAT...	ALL	06/22/2020	06/22/202...	Request Rejected	
94825367	IV Commu...	ALL	Handlin...	IV_Comms_...	94825368	IV DELEGAT...	ALL	02/18/2020	02/18/202...	Request Rejected	
94825367	IV Commu...	ALL	Mail Qu...	IV_Comms_...	94825368	IV DELEGAT...	ALL	12/05/2019	12/05/201...	Request Appro...	 

1 3 10 items per page 1 of 23 items

Viewing Data Delegated to You

Follow these steps to view the data other CRIDs are sharing with you:

















1. Log into IV-MTR and click the **Data Delegation** tab.
2. In the Data Delegation area, click **Data Delegated to My CRID**.
3. The Data Delegated to My CRID screen appears, with a table listing all active delegations.

The **Data Type** drop down allows you to filter delegations records by data type.

- **Note: If you have over 50,000 records**, you will be required to choose a data type from the menu before records will display.

The Export  icon allows you to download a list of all delegations.

The Details  icon allows you to view the details of each delegation.

Request Data Delegation		Manage Data Delegation		Delegate Data to Others		Data Delegated to My CRID	
Data Type	All						
Data Delegated to My CRID 							Search for CRID or MID
MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	DETAILS
Piece	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Container	IV_Communications	94825368	IV DELEGATORS	ALL	06/18/2020	06/18/2020 to No End Date	 
							1 - 10 of 16 items

Deleting Data Delegated to You

(BSA, BSA Delegate, and Data Delegation Managers Only)
















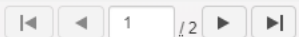
This section is restricted to **BSAs, BSA Delegates, and Data Delegation Managers.**

If you no longer wish to receive a delegation from another CRID, you can delete it.

- All deletions are final. If a delegation is deleted by accident, a new delegation must be created.

To delete an existing delegation, complete the following:

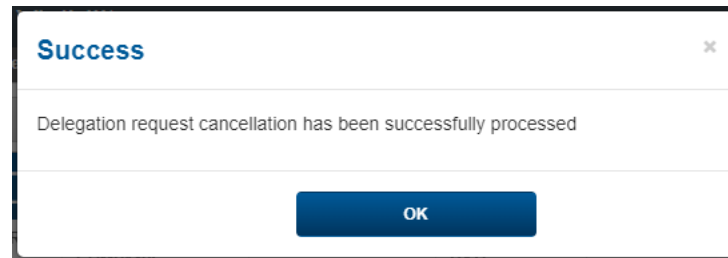
1. Access the **Data Delegated to My CRID** page and locate the delegation in the table.

Request Data Delegation		Manage Data Delegation		Delegate Data to Others		Data Delegated to My CRID	
Data Type	All						
Data Delegated to My CRID  Search for CRID or MID							
MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	DETAILS
Piece	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Package	IV_Comms_Delega...	94825368	IV DELEGATORS	ALL	02/18/2020	02/18/2020 to No End Date	 
Container	IV_Communications	94825368	IV DELEGATORS	ALL	06/18/2020	06/18/2020 to No End Date	 
 1 / 2 10 items per page							1 - 10 of 16 items

2. Click the Delete  icon for the delegation's entry. A confirmation pop-up will appear. Click **DELETE**.



3. A success message will appear, confirming that the delegation was deleted. Click **OK**. Once a deletion is made, the change will be reflected within about 15 minutes.



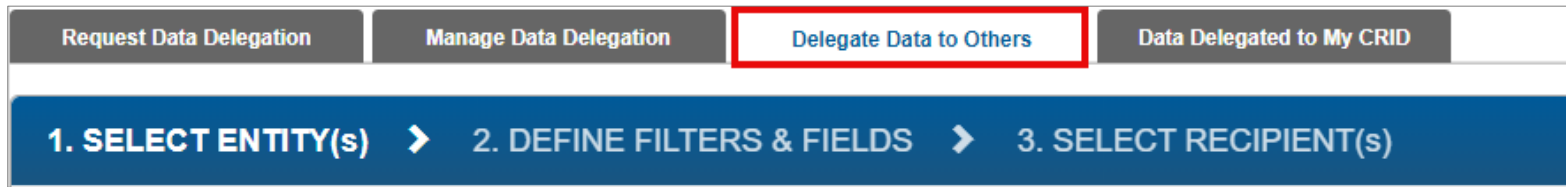
Delegating Data to Others

(BSA, BSA Delegate, and Data Delegation Managers Only)

This section is restricted to **BSAs, BSA Delegates, and Data Delegation Managers.**

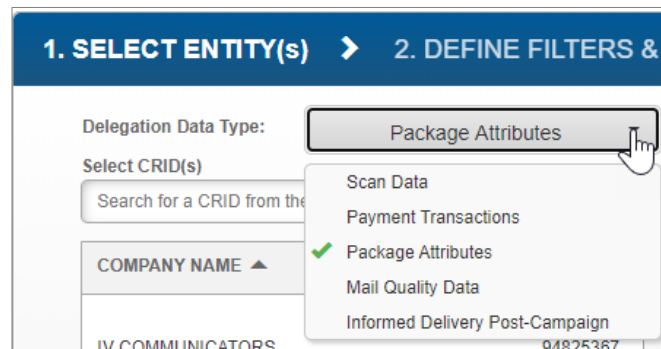
To begin, access the Delegate Data to Others area of the application:

1. Log into IV-MTR and click the **Data Delegation** tab.
2. In the Data Delegation area, click **Delegate Data to Others.**



Follow these steps to delegate data:

1. In the Delegation Data Type dropdown, select the appropriate data type:
 - EPS = Payment Transactions
 - PPC = Package Attributes



2. Use the Select CRID(s) pane to select the CRIDs that will receive the data. Selected CRIDs will move from the Select CRID(s) pane to the Your selection(s) pane.

1. SELECT ENTITY(s) > **2. DEFINE FILTERS & FIELDS** > **3. SELECT RECIPIENT(s)**

Delegation Data Type: Package Attributes

Select CRID(s)

Search for a CRID from the list below

COMPANY NAME ▲	CRID
IV DELEGATORS	94825368

+ ADD ALL CRIDs

Your selection(s)

COMPANY NAME ▲	CRID
----------------	------

3. When you have finished selecting your CRIDs, click **NEXT STEP**.

1. SELECT ENTITY(s) > **2. DEFINE FILTERS & FIELDS** > **3. SELECT RECIPIENT(s)**

Delegation Data Type: Package Attributes

Select CRID(s)

Search for a CRID from the list below

COMPANY NAME ▲	CRID
----------------	------

Your selection(s)

COMPANY NAME ▲	CRID
IV DELEGATORS	94825368

NEXT STEP

4. The Define Filters & Fields page will appear. Check the box(es) for the data types you would like to receive. Once a type is selected, the sub-types (if available) will appear.
 - **Note:** Each box you check will create a separate delegation.

1. SELECT ENTITY(s) >
2. DEFINE FILTERS & FIELDS >
3. SELECT RECIPIENT(s)



SELECTED GRID(s): 94825368

Data Type

- Final Notification
- Pricing Notification
- Manifest Error
- Manifest Auto-Correct
- Duplicate Packages - Piece and Postage
- Rejected Manifest Packages
- Census Attributes
- Unused Labels

5. In the **Choose Delegation Effective Date Range** section, select the dates you would like visibility for.
 - You cannot select dates in the past.
 - Data feeds will only begin delivering data from the time the delegation was approved by the delegators forward (regardless of what dates the you request visibility for).

Choose Delegation Effective Date Range

FROM  TO 

6. **Optional:** Enter any notes you would like to include with the delegation in the text box.

If necessary, please provide any additional explanation for delegating data below.

7. When you have finished, click **NEXT STEP**.

If necessary, please provide any additional explanation for delegating data below.

PREVIOUS STEP

NEXT STEP

8. Use the **Search CRIDs** pane to locate and add the CRIDs you would like to provide visibility to. For best results, use the full CRID.
 - Selected CRIDs will move from the Search CRID(s) pane to the Your selection(s) pane.

Search CRID(s)

94825367 Q

COMPANY NAME ▲	CRID
IV COMMUNICATORS	<div style="text-align: right; font-size: small; color: #0070c0;">Clear</div> 94825367 <div style="text-align: right; font-size: x-small; color: #0070c0;">↓</div>

9. When you have finished adding CRIDs, click **SUBMIT**.

1. SELECT ENTITY(s) >
2. DEFINE FILTERS & FIELDS >
3. SELECT RECIPIENT(s)

Search CRID(s)

Search for a CRID Q

COMPANY NAME ▲	CRID
----------------	------

Your selection(s)

COMPANY NAME ▲	CRID/MID
IV COMMUNICATORS	94825367

PREVIOUS STEP

SUBMIT

10. A confirmation screen will appear. Review the details of your delegation.
- **If you need to make changes**, click the **EDIT** link next to the section that needs updates.

Entities	EDIT
Selected CRID(s)	
94825368	

- **If your delegation is ready to submit**, click **CONFIRM**.

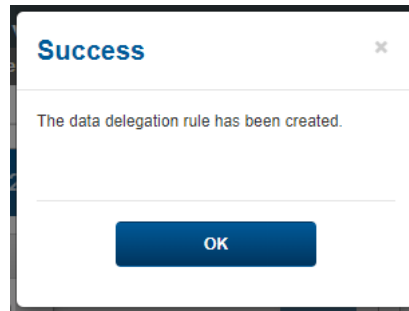
Please Confirm

Last Update Date/Time:

Entities	EDIT	Filters	EDIT
Selected CRID(s)		Data Type	
94825368		Pricing Notification	
Recipients		EDIT	
Selected CRID(s)		94825367	
Delegation Effective Date Range		EDIT	
From 07/29/2020 to No End Date			

CONFIRM

11. A popup will appear, confirming your delegation has been submitted. Users of both the receiving and delegating CRIDs will be notified of the delegation according to their notification settings.



12. Your data delegation is now complete. The delegation will appear in the Data Delegation Authorization History table on the Manage Data Delegation tab.

Reviewing Data Delegation Requests

(BSA, BSA Delegate, and Data Delegation Managers Only)

This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

When another CRID sends a data delegation request to your CRID, a BSA, BSA Delegate, or Data Delegation Manager must review the request and approve or deny it. Instructions are provided in this section.

To begin, access the Manage Data Delegation area of the application:


1. Log into IV-MTR and click the **Data Delegation** tab.
2. In the Data Delegation area, click **Manage Data Delegation**.
3. The Manage Data Delegation screen appears, with the number of pending requests listed in the tab and the requests themselves in the Data Delegation Requests Pending Approval table.
 - Requests are grouped by the CRID that is requesting the delegation.

Request Data Delegation		Manage Data Delegation 6		Delegate Data to Others		Data Delegated to My CRID					
Data Delegation Requests Pending Approval											
Search for CRID or MID											
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
+	94826032 (3 requ...)										✓ ✗
+	94825559 (1 requ...)										✓ ✗
+	94825367 (2 requ...)										✓ ✗

To review the data delegation requests your CRID has received, follow these steps:

- To see the lists of requests:** Click the expand  icon next to a CRID to see its requests.

Data Delegation Requests Pending Approval											Search for CRID or MID
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ...										 

- To view details of a request and modify it (if desired):** Scroll to the **Action** column and click the green checkmark  for the request. The request's Details screen will appear, allowing you to review the request and make any modifications you like.

Data Delegation Requests Pending Approval											Search for CRID or MID
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
	94825367 (2 requ...										 
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	 
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	 

- Proceed as follows:
 - [Approving requests](#)
 - [Denying requests](#)

To approve requests:

- **Individually:** Click on the green checkmark for the request and select **APPROVE**. A success message will appear.

Data Delegation Requests Pending Approval											Search for CRID or MID
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
☰	94825367 (2 requ...										✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕

- **In bulk:** Click the green checkmark on the CRID line and select **APPROVE**.

Data Delegation Requests Pending Approval											Search for CRID or MID
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
☰	94825367 (2 requ...										✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕

The requests will appear in the Data Delegation Authorization History table at the bottom of the page. The users of the delegating and receiving CRIDs will be notified according to their notification settings.

NOTE: All denials are final and cannot be undone. If a delegation is denied by accident, a new one must be created.

To deny requests:

- **Individually:** Click on the red X for the request, select a reason for the denial, and click **SUBMIT**. A success message will appear.

Data Delegation Requests Pending Approval											Search for CRID or MID
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
☰	94825367 (2 requ...										✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕

- **In bulk:** Click the red X on the CRID line, select a reason for the denial, and click **SUBMIT**. A success message will appear.

Data Delegation Requests Pending Approval											Search for CRID or MID
	RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	ACTION
☰	94825367 (2 requ...										✓ ✕
	94825367	IV COMM...	ALL	Payment	IV_Comm...	94825368	IV DELEGA...	ALL	07/28/2020	07/28/202...	✓ ✕

The requests will appear in the Data Delegation Authorization History table at the bottom of the page. The users of the delegating and receiving CRIDs will be notified according to their notification settings.

Modifying & Deleting Existing Delegations

(BSA, BSA Delegate, and Data Delegation Managers Only)

This section is restricted to BSAs, BSA Delegates, and Data Delegation Managers.

Delegators can modify any delegation at any time, for any reason.

- Any changes made will be effective from the date of modification forward.

The following modifications are available for EPS/PPC delegations:

1. Updating the end date to a date (today or future)

- If you would like to update the end date so data is delegated indefinitely, please contact the [IV Solutions Center](#).

If you would like to change any other aspect of the delegation (including the recipients or data types), a new delegation must be created.















- If desired, you can delete the existing delegation using the instructions in this section.



Proceed as follows:



- [Modifying an Existing Delegation](#)
- [Deleting an Existing Delegation](#)


To modify an existing delegation, complete the following:

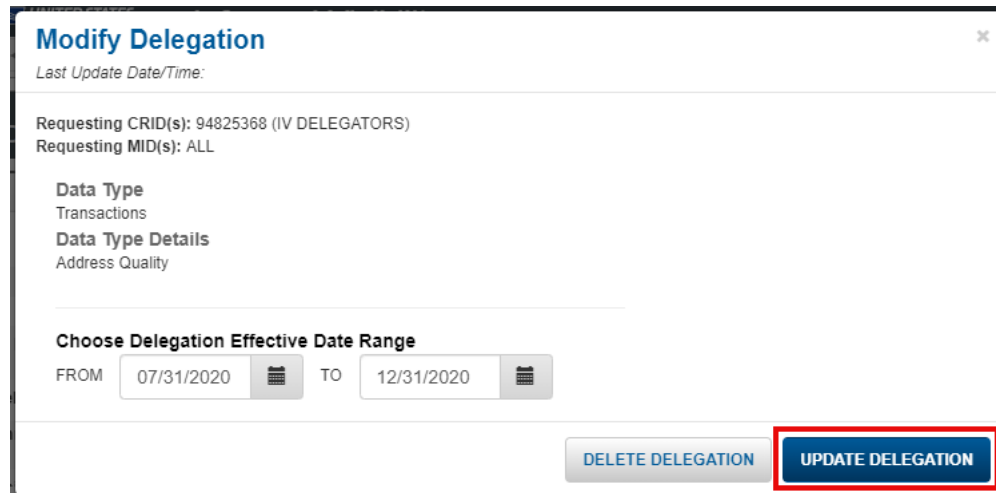
1. Access the **Manage Data Delegation** page and locate the delegation in the Data Delegation Authorization History table at the bottom of the page.

Data Delegation Authorization History 											Search for CRID or MID
RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE ▾	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS
94825367	IV COMMUNI...	ALL	Piece	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	 
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	 
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ca...	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 



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 1 of 10 of 20 items

2. Click the Modify  icon for the delegation. A Modify Delegation pop-up will appear, listing the details for the delegation. You can update the end dates as desired. When you have finished, click **UPDATE DELEGATION**.
 - If you would like to update the end date so data is delegated indefinitely, please contact the [IV Solutions Center](#).





Modify Delegation ×

Last Update Date/Time:

Requesting CRID(s): 94825368 (IV DELEGATORS)
Requesting MID(s): ALL

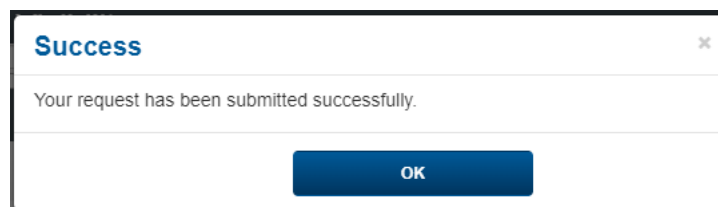
Data Type
Transactions
Data Type Details
Address Quality

Choose Delegation Effective Date Range

FROM 07/31/2020  TO 12/31/2020 

DELETE DELEGATION UPDATE DELEGATION

3. A success message will appear. The delegation recipients will be notified of the modifications according to their notification settings.



Success ×

Your request has been submitted successfully.















OK





Delegators can delete any delegation at any time, for any reason.

- Once a deletion is made, the change will be reflected within about 15 minutes.
- All deletions are final. If a delegation is deleted by accident, a new delegation must be created.

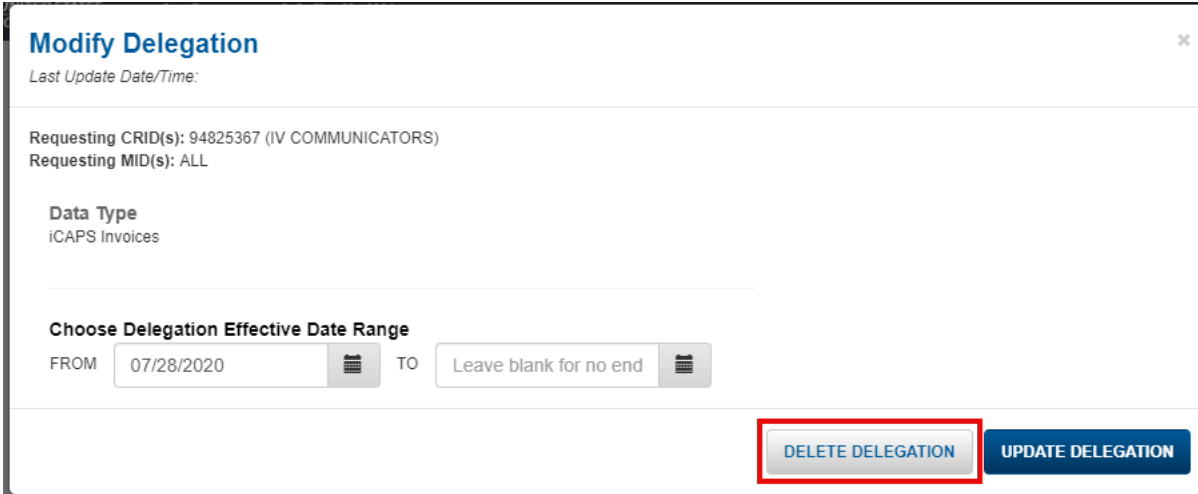
To delete an existing delegation, complete the following:

- Access the **Manage Data Delegation** page and locate the delegation in the Data Delegation Authorization History table at the bottom of the page.

Data Delegation Authorization History 											Search for CRID or MID	
RECEIVING CRID	RECEIVING COMPANY	RECEIVING MID	MAIL OBJECT TYPE	REQUESTOR	DELEGATING CRID	DELEGATING COMPANY	DELEGATING MID	REQUEST DATE	EFFECTIVE FOR	STATUS	DETAILS	
94825367	IV COMMUNI...	ALL	Piece	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	 	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	07/28/20...	07/28/202...	Request Ap...	 	
94825367	IV COMMUNI...	ALL	Payment	IV_Commu...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ca...		
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 	
94825367	IV COMMUNI...	ALL	Package	IV_Comms...	94825368	IV DELEGAT...	ALL	02/18/20...	02/18/202...	Request Ap...	 	



 /


 items per page
 1 - 10 of 20 items

- Click the Modify  icon. A Modify Delegation pop-up will appear, listing the details for the delegation. Click **DELETE DELEGATION**.





Modify Delegation ×

Last Update Date/Time:

Requesting CRID(s): 94825367 (IV COMMUNICATORS)
Requesting MID(s): ALL

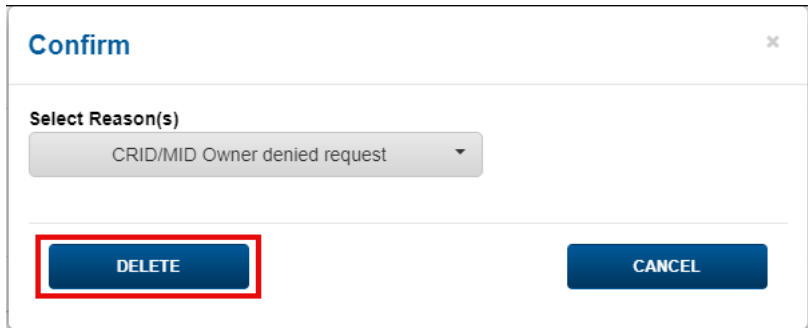
Data Type
iCAPS Invoices

Choose Delegation Effective Date Range

FROM 07/28/2020  TO Leave blank for no end 

DELETE DELEGATION **UPDATE DELEGATION**

- A Confirm pop-up will appear, listing the CRIDs and MIDs in the delegation. In the **Select Reason(s)** dropdown, choose a reason and click **DELETE**.



Confirm ×

Select Reason(s)

CRID/MID Owner denied request

DELETE **CANCEL**

4. A success message will appear, confirming that the delegation was deleted. Click **OK**. Once a deletion is made, the change will be reflected within about 15 minutes.

