

**WEB-BASED TRAINING GUIDE  
FOR  
Automated Commercial Environment (ACE)  
e-Manifest: Trucks**

**Version 1.0**

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# Table of Contents

Module 1: Course Navigation .....	3
Lesson 1: Automated Commercial Environment (ACE) Web-based Training Navigation .....	3
Module 2: e-Manifest: Trucks.....	7
Lesson 1: Introduction.....	7
Lesson 2: Setting Up Records in the ACE Portal.....	24
Lesson 3: Creating a Complete Manifest.....	44
Lesson 4: Creating an Unassociated Shipment .....	84
Lesson 5: Creating a Trip .....	101
Lesson 6: Linking an Unassociated Shipment to a Trip.....	119
Lesson 7: Adding a Party .....	131
Lesson 8: Designating a Shipment Type.....	142
Lesson 9: Split Shipment .....	156
Lesson 10: Amend Manifest.....	174
Lesson 11: Searching Manifest Status.....	186
Lesson 12: In-Bond Arrivals .....	196
Lesson 13: Reporting .....	202

# Module 1: Course Navigation

## ***Lesson 1: Automated Commercial Environment (ACE) Web-based Training Navigation***

### Screen 1:

#### Lesson 1: Automated Commercial Environment (ACE) Web-based Training Navigation

After completing this lesson, you will be able to:

- Explain the ACE Web-based training course structure.
- Use the Navigation Bar buttons to move through course screens.
- Use interactive course features such as rollovers and simulations.

Image: Computer monitor displaying the ACE logo.

### Screen 2:

#### Course Disclaimer

The names of companies and persons mentioned in all ACE Web-based training courses are fictional. Information related to addresses, e-mails, phone numbers, license numbers, etc, is used solely for instructional purposes and should not be considered valid data.

Course screenshots and simulations of the ACE Secure Data portal were captured from a test environment; as a result, slight differences may occur in the look and functionality of ACE due to date of publishing.

Image: A gavel laying on top of a document.

## Screen 3:

### Course Structure

Each ACE Web-based training course follows a module and lesson structure. Each module is divided into a number of lessons.

The course menu reflects a list of modules on the left and the associated list of lessons on the right. To begin the course, select a module name and then the lesson name.

Each ACE Web-based training course is designed to allow you to proceed at your own pace. You can complete the course modules and lessons in one sitting or in stages.

Image: Sample ACE Web-based Training menu displaying Module links on the left and Lesson links on the right.

## Screen 4:

### Using the Navigation Bar

At the bottom of each lesson screen, there is a Navigation Bar. The Navigation Bar allows for movement through the screens of an ACE Web-based training course.

Image: Chart that shows Navigation Bar Options (see below) and definitions.

### Navigation Bar Options

Pause. Temporarily stops the slide.

Next. Moves to the next slide.

Back. Moves to the previous slide.

Exit. Exits the lesson and returns to the Course Menu.

Progress Bar. Shows overall progress and allows movement through the slides in either direction.

## Screen 5:

### Navigating Interactive Simulations

A simulation is an interactive feature that imitates real world use. The example below describes how highlighting and captions are used as guidance in simulations.

Callout: When using the simulations, select areas highlighted in red to complete steps.

Callout: Blue directional captions provide instructional steps to follow.

Image: Partial ACE secure data portal screenshot with arrows pointing to callouts.

## Screen 6:

### Rollovers

Rollovers are images that change to display additional details or information when a mouse cursor is positioned over a specified location. The text that appears is called rollover text.

The example to the left contains rollovers. Position your mouse cursor over the image to reveal related rollover text.

R1 rollover displays Basic Foundational Design - released 2001.

R2 rollover displays Functionality to the Trade - released 2003.

R3 rollover displays Periodic Monthly Statement - released 2004.

R4 rollover displays E-manifest Trucks - released 2005.

Image: Diagram of ACE Releases, R1, R2, R3 and R4.

## Screen 7:

You have completed Lesson 1: ACE Web-Based Training Navigation.

In this lesson you learned how to navigate an ACE Web-based training course.

Image: Purple rectangle surrounding the screen text. A computer monitor displaying the ACE logo is in the lower-right corner of the rectangle.

## Module 2: e-Manifest: Trucks

### ***Lesson 1: Introduction***

#### Screen 1:

##### Lesson 1: Introduction

In Lesson 1: Introduction, you will learn about the features and capabilities of e-Manifest: Trucks (Release 4), the automated process for filing electronic manifests in the ACE portal. Periodic Payments (Release 3) is a prerequisite training for this lesson.

After completing this lesson, you will be able to:

- Identify new capabilities for truck carriers in the ACE portal.
- Explain the benefits of e-Manifest: Trucks (Release 4) for the Trade community.
- Describe the features of the Manifest tab.

Image: Computer monitor displaying the ACE logo.

#### Screen 2:

The first automated manifest for all trucks is here!

e-Manifest Trucks (Release 4) extends the capabilities of the ACE portal to truck carrier accounts. You can create, submit, and manage electronic manifests with ACE. Submitting the manifest early supports the twin goals of CBP, expediting legitimate trade while keeping America's borders secure. You can access the ACE portal at <https://ace.cbp.dhs.gov/>

Image: Computer monitor displaying the ACE logo.

### Screen 3:

The ACE portal works with the legacy Automated Commercial System (ACS) release process. The features of e-Manifest: Trucks (Release 4) support compliance with the Trade Act of 2002 Required Advance Electronic Presentation of Cargo Information Requirements.

e-Manifest: Trucks (Release 4) includes capabilities for you, or a designated party, to create, submit, and manage e-Manifests for all applicable shipment types, including in-bonds. ACE provides a new feature to truck carriers that lets them arrive their own in-bond shipments. Reports are also available for carrier accounts. Carriers can designate parties to receive the status of a shipment.

Image #1: Clipboard with an "at" symbol on it.

Image #2: The word "Featuring" placed over a yellow ellipse is displayed over the second text paragraph on the screen.

Rollover text:

The words "designated party" - A designated party can be any person that you add to your ACE account and to whom you have granted permission to create manifests. Some examples are Brokers, other carriers, or third-party service centers. You may add or delete designated parties at any time.

### Screen 4:

Submitting e-Manifests through the ACE portal complies with the Advanced Electronic Presentation of Cargo Information Rule. Some of the related Federal Register Notices (FRNs) are listed below.

Select each element below to read a summary.

Image: Federal Register Document cover.

Rollover text #1:

Federal Register Notices (FRNs) - Other subsequent FRNs can be viewed on the web at:

[http://www.cbp.gov/xp/cgov/trade/legal/recent\\_federal\\_register\\_notices/](http://www.cbp.gov/xp/cgov/trade/legal/recent_federal_register_notices/)

Rollover text #2:

December 5, 2003 Required Advance Electronic Presentation of Cargo Information - This document amends the Customs Regulations to provide that CBP must receive, by way of a CBP-approved Electronic Data Interchange (EDI) system, information pertaining to cargo before the cargo is either brought into or sent from the U.S. by any mode of commercial transportation (sea, air, rail, or truck).

Rollover text #3:

February 4, 2004 Applications To Establish Truck Carrier Account - This document announces that CBP is accepting applications to establish Truck Carrier accounts for the National Customs Automation Program (NCAP) test for ACE. Truck carriers who open Truck Carrier accounts will eventually have the ability to file truck manifest information electronically via the ACE portal or via EDI messaging.

Rollover text #4:

September 13, 2004 Test of Automated Truck Manifest for Truck Carrier Accounts - This document announces that CBP, in conjunction with the Department of Transportation Federal Motor Carrier Safety Administration (FMCSA), plans to conduct an NCAP test concerning the transmission of automated truck manifest data. This notice provides a description of the test process, outlines the development and evaluation methodology to be used, sets forth eligibility requirements for participation, and invites public comment on any aspect of the planned test.

Rollover text #5:

March 21, 2005 Test of Automated Truck Manifest - This document provides a modification to CBP's NCAP test concerning the transmission of automated truck manifest data. The original notice announcing this test stated that the transmission of certain data elements is requested, but not required. This notice emphasizes that all relevant data elements (with a single exception, as explained in this notice) are required to be submitted in the automated truck manifest submission.

Rollover text #6:

May 21, 2005 Test of Automated Truck Manifest for Modification of Deployment Schedule - This document announces that CBP is currently conducting a NCAP test concerning the transmission of automated truck manifest data, This document announces a modification of the deployment schedule for this test.

Rollover text #7:

July 29, 2005 Test of Automated Truck Manifest for Truck Carrier Account - This document announces that CBP is currently conducting a NCAP test concerning the transmission of automated truck manifest data. This document announces the next two groups, or clusters, of ports to be deployed for this test.

Rollover text #8:

October 14, 2005 Test of Automated Truck Manifest - This document announces the next group, or cluster, of ports to be deployed for this test.

Screen 5:

e-Manifest is a comprehensive process that includes the benefits shown below

Select each picture to learn more about the benefits of e-Manifest: Trucks (Release 4).

Image #1: Fingers typing on a keyboard with the words "3 Ways to Submit" under the image.

Image # 2: Picture of a truck with the words "Reduced Time" under the image.

Image #3: Fingers typing on a keyboard with the word "Communication" under the image.

Image #4: Picture of a computer monitor displaying the ACE logo with the words "Store/Access Information" under the image.

Rollover text #1:

3 Ways to Submit - Carriers can participate in ACE in three ways: through the ACE portal, via a direct EDI link, or through a combination of ACE and EDI. Carriers can record all company, cargo, crew, conveyance, and equipment data in the ACE portal. Companies can opt to send all the information via a direct EDI link. A combination of EDI and ACE can also be used. For example: company and cargo information sent via EDI, and crew, conveyance, and equipment sent through the ACE portal.

Rollover text #2:

Reduced Time - The Trade community benefits because advanced electronic submission of data reduces processing time. The Electronic Release (e-Release) is a simplified and expedited cargo release. The manifest and the entry are matched within ACE. Current shipment release programs, such as Pre-Arrival Processing System (PAPS), Section 321, Border Release Advanced Selectivity System (BRASS), and In-Bond are supported by ACE.

Rollover text #3:

Communication - Carriers can use the Broker Download feature to send shipment data to the entry filers. The entry and e-Manifest are matched within ACE.

Rollover text #4:

Store/Access Information - Reports track account activity. In the ACE portal, you can access a set of reports to evaluate and identify compliance issues and risks. Carrier accounts have the option of storing conveyance and crew information in their account to reduce the data entry required with each crossing by using lookups. A Business Activity Log (BAL) records, displays, and stores information activities, or communications regarding your account. You can learn more details about these features in the Periodic Payments (Release 3) WBT.

## Screen 6:

The e-Manifest business process steps are shown below.  
Select each element to see more details.

Image: Blue rectangular box divided into six separate panels with the text captions for process steps.

Rollover text #1:

Set Up and Manage ACE Account - Carriers have the option of storing conveyance, equipment, crew, shipper and consignee information in their account, reducing the data entry required for each crossing by using lookups. You can learn more details about these Account Management features in the Periodic Payments (Release 3) WBT.

Rollover text #2:

Create a Manifest - You can create shipments and later link them to a trip, or create shipment and trip information at one time. You can

access information on conveyance, equipment, crew, shipper and consignee information that you store in your account.

Rollover text #3:

Submit an e-Manifest - The Review Standard Manifest panel displays all of the information that you have entered into the system for a particular manifest so that you can give it a final review before submitting it to ACE. Should you decide to do so, you can also edit the manifest from this screen prior to submitting it.

Rollover text #4:

Check Status - You can obtain status of your cargo, crew, conveyance, and equipment regardless of whether you submitted your information via EDI or the ACE portal.

Rollover text #5:

Arrive an In-Bond - The In-bonds Due To Arrive panel lets you search for and view a list of all the in-bond shipments that are due to arrive at a specific port.

Rollover text #6:

Amend an e-Manifest - If corrections or modifications are required after you have submitted a manifest, you may make these adjustments and supply a reason and an amendment code for doing so.

Screen 7:

e-Manifest: Trucks (Release 4) delivers a variety of features for the Trade community to submit data and receive information via the Web.

Select each element to see more details.

Image: Six circles with the text caption for each feature/element.

Rollover text #1:

Broker Download - Use the Broker Download feature to transfer pertinent information to the entry filer, ensuring a match between entry and manifest. Shipment data reported by the carrier is forwarded to the ACS entry filer identified by the carrier.

Rollover text #2:

Lookup Links - Use lookup links to save time and avoid repetitive data entry by storing your crew, conveyance, and equipment data in your ACE account. You can also look up U.S. port codes, foreign port codes, and Facilities Information Resource Management System (FIRMS) codes.

Rollover text #3:

Secondary Notify Party - Add a Secondary Notify Party to send a notification, which posts to the Automated Commercial System (ACS) to additional interested parties. These include brokers in subsequent ports, other carriers, deconsolidators, and warehouses.

Rollover text #4:

Search for Status - Obtain the status of your cargo, crew, conveyance, and equipment via EDI or the ACE portal.

Rollover text #5:

Request, Arrive & Export In-Bonds - Reports Generate reports tailored to your needs. Carriers will have access to a set of reports to evaluate and identify compliance issues and risks.

Rollover text #6:

Request and Arrive In-Bond - ACE supports these in-bond types: 61 - Immediate Transportation (IT), 62 - Transportation and Exportation (T&E), 63 - Immediate Exportation. (IE)

## Screen 8:

e-Manifest: Trucks (Release 4) consolidates ACE release information with data from legacy systems and programs. With ACE, the International Trade Data System (ITDS) has taken the first step toward the "Single Window to the Government."

Select the name of each system or program to learn more about ACE interfaces.

Image: Circle with text caption, e-Manifest: Trucks is a single system for truck release, in the middle with the names of the seven systems or programs (In-Bond, Section 321, BRASS, PAPS, CAFES, FAST, and FMCSA) around the outside.

Rollover text #1:

The words "International Trade Data System (ITDS)" - The ITDS program is designed to implement an integrated government-wide system for the electronic collection, use, and dissemination of the international trade and transportation data that federal agencies need to perform their missions. More than 100 federal agencies have been mandated to collect, use, and disseminate international trade and transportation data.

Rollover text #2:

In-Bond - In-bond request and authorization and in-bond arrival can be performed via the ACE portal.

Methods of supported data transmission are ACE e-Manifest: Trucks (Release 4), Electronic In-Bond via the Automated Broker Interface (record identifiers QP/WP), and Customs Automated Forms Entry System (CAFES).

Rollover text #3:

Section 321 (a type of informal entry) - Special rules apply, 19 Code of Federal Regulations (CFR) 143.23(j): country of origin and value will be entered into the manifest shipment records. With these additional data elements, the manifest becomes the entry. Maximum value is \$200.

Rollover text #4:

Border Release Advanced Screening and Selectivity (BRASS) - Common Commodity Classification Code (C-4) code numbers will be entered into the manifest records. BRASS barcodes are not required. An entry number will be assigned at the time of release.

Rollover text #5:

Pre-Arrival Processing System (PAPS) - Border cargo selectivity, entry, and entry summary can be pre-filed in ACE. Bar codes are not required. Shipment Control Number (SCN) must match the SCN supplied on the entry. Manifest and entry information are reconciled within ACE.

Rollover text #6:

Customs Automated Forms Entry System (CAFES) -CAFES will be supported as an alternative in-bond process.

Rollover text #7:

Free and Secure Trade (FAST) - - ACE supports the release of FAST trips. FAST transactions cannot be created or modified via the ACE portal. However, FAST transactions can be viewed via the ACE portal.

Rollover text #8:

Federal Motor Carrier Safety Administration (FMCSA) - FMCSA will send ACE up-to-the-minute safety information on trucks crossing the borders, and in return, will receive accurate and timely statistics.

Screen 9:

The vision of ACE/ITDS is secure, integrated, two-way communication between international trade interests and the government through a single window.

Select each picture to learn more about ITDS.

Image: Silhouette of a truck representing the Trade Community with an arrow going to a box labeled with the ACE and ITDS logos representing the single window to the government, followed by arrows pointing to three buildings with pillars representing 100+ federal agencies.

Rollover text #1:

The Trade Community - When ACE/ITDS is fully functional, the Trade community will electronically transmit their information to a single destination. Information will be real-time, and Trade community interests will receive the information they need in electronic format.

Rollover text #2:

“Single Window to the Government” - The role of ITDS is to make ACE a government-wide system. ITDS functions are incorporated into ACE. The goal is for ACE/ITDS to distribute the information to participating agencies. Only those agencies with a legal or regulatory interest in the information will receive data, and they will receive only that portion of the data in which they have a legal or regulatory interest.

Rollover text #3:

100+ Federal Agencies - More than 100 federal agencies are involved in international trade. Of those agencies, more than two dozen collect

international trade and transportation data from the private sector before or at the time of inspection at the border. FMCSA was the first agency in ITDS; other agencies have been and will continue to be added in the future.

### Screen 10:

It is recommended that drivers have the paper manifest available, as well as an e-Manifest.

Select the billboard to get more details on reasons to bring a paper manifest.

Image: Billboard with Text caption, "Remember! Bring your paper manifest!" displayed.

Rollover text:

It is beneficial to have a paper manifest in case of weather condition interference with transponders, and periods of system downtime. Other government agencies may also require a paper manifest.

### Screen 11:

The password feature for your ACE account is improved for e-Manifest: Trucks (Release 4). When your new ACE account is created, you will receive an e-mail containing a link to the Password Retrieval page. To retrieve your password, you will need to enter your shared secret value.

Select the picture to learn more about shared secret values.

Image: An envelope.

Rollover text:

If you are the Trade Account Owner (TAO), contact the CBP Technology Support Center for assistance with your shared secret value.

If you are a proxy TAO or account user, contact the TAO for assistance with your shared secret value.

## Screen 12:

The first time you log in to the ACE portal, you will be asked to answer a few challenge questions about your favorite things or other information only you would know.

Why do you think ACE wants to know about your favorite things? Select the pictures to find out.

Image #1: An image of a padlock on top of a silhouette of a man's face.

Image: A silhouette of a man indicating the need for quiet.

Rollover text #1:

If you forget your password, ACE will verify your identity by asking you to correctly answer your challenge questions. Then, you can reset your own password without needing to call the Technology Support Center.

Rollover text #2:

After you have recorded the answers to your challenge questions, ACE will ask you to change your initial system-generated password to one that you choose.

## Screen 13:

We will now log into ACE and navigate the manifest screens in the ACE Portal.

If you want more information about logging in to ACE for the first time, please see the ACE Initial Login WBT.

Open the Launch Internet Explorer Browser icon

Image: Computer desktop displaying the Internet Explorer icon.

## Screen 14:

Select the Address text box

Image: CBP.gov webpage.

### Screen 15:

Select the GO button

Image: CBP webpage displaying <https://ace.cbp.dhs.gov> in the Address text box.

### Screen 16:

Now you are ready to log in with your new login information.

Scroll down

Image: ACE Login webpage.

### Screen 17:

Select the UserID text box.

Image: ACE Login webpage.

### Screen 18:

Select the Password text box.

Image: ACE Login webpage with text in the UserID text box.

### Screen 19:

Select the Login button.

Image: ACE Login webpage with text in both the UserID text box and the Password text box.

## Screen 20:

The ACE portal defaults to the Home tab. Manifests are created and maintained using the Manifest tool on the Tools tab.

Select the Tools tab

Image: ACE Portal Home tab.

## Screen 21:

Select the Manifest Tools link

Image: ACE Portal Tools tab. This screen is divided into two panels, the Task Selector panel and the User Access panel. Manifest Tools is a link within the Task Selector panel.

## Screen 22:

There are four panels on the Manifest tool. You will need to expand the account you will be working with in the Accounts list to view information in the Manifest and Shipment panels.

Select the + next to CBP Incorporated

Image: ACE Portal Tools tab. This screen divides into four panels: Task Selector, Account Selector List, Manifest, and Shipment. The Accounts list is in the Account Selector List panel.

## Screen 23:

Select the TRUCK AMS TEST CARRIER link

Image: ACE Portal Tools tab. The Accounts list expands to display four account hyperlinks.

## Screen 24:

Once you have selected the carrier, the Manifest and Shipment panels populate with carrier-specific information.

The Manifest panel lets you view manifest details or go to other screens to create, edit, and cancel manifests. The fields and selectors you see here are used to filter the list. Selecting a Trip # from the list takes you to the View Manifest screen. The Create a Standard Manifest link displays the Create Standard Manifest panel.

Scroll down

Image: ACE Portal Tools tab. The Manifest panel now displays manifest details related to the selected carrier account.

## Screen 25:

The Shipment panel lets you view shipment details or go to other screens to create, edit, and cancel shipments.

Selecting a Shipment Control # takes you to the View Shipment screen. Selecting Create Standard Shipment takes you to the Create Standard Shipment screen.

Image: ACE Portal Tools tab. The Shipment panel now displays shipment details related to the selected carrier account.

## Screen 26:

To Summarize...

You learned about the new capabilities and benefits of the ACE portal.

You reviewed the steps for processing an e-Manifest.

You read about the ITDS initiative to provide secure, integrated, and two way communication.

You logged into the system for the first time.

Image: A clipboard leaning against a stack of boxes.

## Screen 27:

### Knowledge Check

Submitting e-Manifests through ACE complies with which of the following?

- A) The Patriot Act of 2001 Record and Report for Instruments of Monetary Transactions Requirements.
- B) Trade Act of 2002 Required advanced Electronic Presentation of Cargo Information Requirements.
- C) The Counterfeit Response Act of 2003 Testing and Verification Requirements.
- D) Country-of-Origin Labeling Enhancement Act of 2004 Expedited Implementation of Country-of-Origin Labeling Requirements.

The correct answer is B.

## Screen 28:

### Knowledge Check

Using the features of e-Manifest: Trucks (Release 4) in ACE, carrier accounts or their designated agents can do which of the following?

- A) Create, submit, and manage e-Manifests for all shipment types.
- B) Arrive their own in-bonds.
- C) Access a set of reports to evaluate and identify compliance issues and risks.
- D) All of the above.

The correct answer is D.

### Screen 29:

#### Knowledge Check

Carriers can participate in ACE in which of the following ways?

- A) Send all company, crew, conveyance, and equipment data via the ACE portal.
- B) Send all company, cargo, crew, conveyance, and equipment data via a direct EDI link.
- C) Use a combination of EDI and ACE.
- D) All of the above.

The correct answer is D.

### Screen 30:

#### Knowledge Check

Which of the following is the first participating government agency in ITDS?

- A) USPGA
- B) FMCSA
- C) CBP
- D) DHS

The correct answer is B.

### Screen 31:

#### Knowledge Check

Which choice lists the names of the three panels contained in the Manifest tool?

- A) UserID, Password, Login
- B) Home, Accounts, Reports
- C) Account List, Manifest, Shipment
- D) Create, Submit, Manage

The correct answer is C.

### Screen 32:

#### Knowledge Check

For more information on features to help manage your ACE portal account, you should refer to which of the following?

- A) Periodic Payment (Release 3) WBT
- B) Federal Register Notices
- C) The Review Standard Manifest panel
- D) None of the above

The correct answer is A.

### Screen 33:

You have completed this lesson. In this lesson, you learned about the capabilities and benefits of e-Manifest: Trucks (Release 4).

For more information, see the following section of the Online Help in the ACE portal:

- Trade Introduction to ACE

## ***Lesson 2: Setting Up Records in the ACE Portal***

### Screen 1:

#### Lesson 2: Setting Up Records in the ACE Portal

In Lesson 2: Setting Up Records in the ACE Portal, you will learn how to record crew, conveyance and equipment data in your ACE account. Periodic Payments (Release 3) is prerequisite training for this lesson.

After completing this lesson, you will be able to:

- Store crew data.
- Store conveyance data.
- Store equipment data.
- Store Shipper names and addresses.
- Store Consignee names and addresses.
- Set up notifications.

Image: Computer monitor displaying the ACE logo.

### Screen 2:

When you first set up your ACE account, you select to receive notifications through the ACE portal or via Electronic Data Interchange (EDI).

Image#1: Computer monitor displaying the ACE logo.

Image #2: A woman working at a computer.

Image #3: A truck at a port.

Rollover text:

The word "notifications" - Notifications provide the carrier with the status of the trip, crew, and equipment; i.e. arrived, held, or released.

Screen 3:

Entering crew, conveyance, equipment, consignee and shipper information into every trip or manifest that you create can be time consuming, expensive, and repetitive. e-Manifest: Trucks (Release 4) lets you store required information in your ACE account and then use the Lookup feature to add the data whenever you need it.

To see more information on initially setting up your ACE Account, including adding addresses and contact information, please see the ACE Initial Login WBT.

Image #1: Text reading, "Save Time! Save Money! Save Work!"

Image #2: People in miniature cars driving on a road.

Screen 4:

You are logged in to the ACE portal and are in the Accounts tab in the Carrier view. You are able to store crew, conveyance, equipment information, Shipper and Consignee names and addresses at the Standard Carrier Alpha Code (SCAC) level.

You can view the SCAC level from the Account List panel on the left.

There is no need to enter FAST drivers into your account as they are already in the ACE portal. Additionally, FAST driver information cannot be updated via the portal. You must contact the FAST Enrollment Center to update driver information. Enrollment Centers are listed on the CBP web site.

Select the Drivers/Crew link

Image: ACE Portal Accounts tab. The Carrier view is selected. This page divides into four panels: Task Selector, Account Selector List, View Top Account, and Carrier. At the bottom of the Carrier tab are seven hyperlinked tabs: Contacts, Addresses, Drivers/Crew, Conveyances, Equipment, Shippers, and Consignees.

Screen 5:

You want to add a new driver, Jacob Greene, to your account.

You can edit an existing driver or crew member's information by selecting their name from the list.

Select the Add Driver link

Image: ACE Portal Accounts tab; Carrier panel. The Drivers/Crew tab within the Carrier panel has been selected. It contains the Add Driver link.

Screen 6:

Select the Last Name text box

Image: ACE Portal Accounts tab. The Carrier view is selected. This page is divided into four panels: Task Selector, Account Selector List, Driver/Crew, and View Top Account. The Driver/Crew panel contains the Last Name text box.

Screen 7:

Select the First Name text box

Image: ACE Portal Accounts tab; Driver/Crew panel. The name Greene has been added to the Last Name text box. The First Name text box is directly below the Last Name text box.

Screen 8:

Select the Calendar icon

Image: ACE Portal Accounts tab; Driver/Crew panel. The name Jacob has been added to the First Name text box. The Date of Birth text box is directly below the First Name text box. Next to the Date of Birth text box is the Calendar icon.

Screen 9:

Select the May 2009

Image: ACE Portal Accounts tab; Driver/Crew panel. Upon selecting the Calendar icon, the Choose a date drop-down menu displays, containing the month and year as well as a calendar for the related month and year.

Screen 10:

Select the Month combo box

Image: Driver/Crew panel; Choose a date drop-down menu. Upon selecting "May 2009", the Month combo box and year field display, with two buttons (Okay and Cancel) below.

Screen 11:

Select the September item

Image: Driver/Crew panel; Choose a date drop-down menu.

Screen 12:

Select the Year field

Image: Driver/Crew panel; Choose a date drop-down menu.

Screen 13:

Select the Okay button

Image: Driver/Crew panel; Choose a date drop-down menu. The year 1972 is entered in the Year field.

Screen 14:

Select the 7 link

Image: Driver/Crew panel; Choose a date drop-down menu.

Screen 15:

Select the check box

Image: ACE Portal Accounts tab; Driver/Crew panel. The date 09/07/1972 has been added to the Date of Birth text box. Below the Date of Birth text box is a checkbox next to the text, "Your use of the FIRST NAME, LAST NAME, DATE OF BIRTH, and/or COMMERCIAL/ENHANCED DRIVER LICENSE NUMBER for the referenced individual constitutes your acknowledgement to CBP that you are authorized to access his/her personally identifiable information."

Screen 16:

Select the Search button

Image: ACE Portal Accounts tab; Driver/Crew panel. The checkbox has been selected. Below the checkbox are two buttons: Search and Cancel.

Screen 17:

Select the Create New Driver button

Image: ACE Portal Accounts tab; Driver/Crew panel. Upon selecting the Search button, a listing of any results display, along with two buttons: Create New Driver and Cancel. No results were found for the added search criteria.

Screen 18:

Select the Male radio button

Image: ACE Portal Accounts tab; Driver/Crew panel. The Driver/Crew panel now contains an assortment of radio buttons and text boxes in which information related to the new crew member can be added.

Screen 19:

Select the Complete Name field

Image: Driver/Crew panel. The Male radio button is selected.

Screen 20:

Select the Citizenship/Nationality combo box

Image: Driver/Crew panel. Text has been added to the Complete Name field.

Screen 21:

Scroll down

Image: Driver/Crew panel

Screen 22:

Select the USA item

Image: Driver/Crew panel

Screen 23:

Now we will add Jacob's Commercial Driver's License information.

Select the Commercial Driver's License # field

Image: Driver/Crew panel; Driver Documentation section. USA is now selected in the Citizenship/Nationality combo box.

Screen 24:

Select the no radio button

Image: Driver/Crew panel; Driver Documentation section. Text has been added to the Commercial Driver's License # field. The No radio button is in response to the question, "Is this an Enhanced Driver's License?"

Screen 25:

Select the Country combo box

Image: Driver/Crew panel; Driver Documentation section. The no radio button is selected.

Screen 26:

Scroll down

Image: Driver/Crew panel; Driver Documentation section.

Screen 27:

Select the USA item

Image: Driver/Crew panel; Driver Documentation section.

Screen 28:

Select the State/Province field

Image: Driver/Crew panel; Driver Documentation section. USA is now selected in the Country combo box.

Screen 29:

Select the No radio button

Image: Driver/Crew panel; Driver Documentation section. Text has been added to the State/Province field. The No radio button is in response to the statement, "HAZ-MAT endorsement(s):".

Screen 30:

Scroll down

Image: Driver/Crew panel; Driver Documentation section.

Screen 31:

The Western Hemisphere Travel Initiative (WHTI) is a CBP program intended to facilitate travel on land border crossings between the US and Canada and between the US and Mexico. You are required to enter at least one WHTI-approved travel document for each driver or crew member. This can be either the enhanced CDL or another type of document listed here. We will list Jacob's passport here.

Select the Passport field

Image: Driver/Crew panel; Additional WHTI Documentation section.

Screen 32:

Select the Passport Country combo box

Image: Driver/Crew panel; Additional WHTI Documentation section. Text has been added to the Passport field.

Screen 33:

Scroll down

Image: Driver/Crew panel; Additional WHTI Documentation section.

Screen 34:

Select the USA item

Image: Driver/Crew panel; Additional WHTI Documentation section.

Screen 32:

Scroll down

Image: Driver/Crew panel. USA is now selected in the Passport Country combo box.

Screen 36:

You are ready to record Jacob's personal information and return to the Carrier Details panel.

Select the Save button

Image: Driver/Crew panel. At the bottom of this panel are two buttons: Save and Cancel.

Screen 37:

Select the OK button

Image: ACE Portal Accounts tab; Driver/Crew panel. The Driver/Crew panel now contains the added driver information and an OK button.

Screen 38:

You have successfully stored Jacob Greene in your ACE account. His name now appears in the Drivers/Crew list.

If you need to add additional crew members or drivers, follow the same process to add them.

Let's move on to Conveyances.

Select the Conveyances tab

Image: ACE Portal Accounts tab; Carrier panel. The Conveyances tab is at the bottom of the Carrier panel.

Screen 39:

You are ready to add a new conveyance to your list. A conveyance is the vehicle that moves cargo, in this case the tractor portion of a tractor-trailer. The trailer is termed equipment in ACE. We will cover equipment later in this course.

Previously registered Transponder IDs for a Conveyance will automatically be added to an ACE account when the account is set up. Use the Transponder registration process to make modifications to existing Conveyance data. This will automatically update the ACE portal records. Conveyances without Transponders should be entered via the Conveyances Tab

Add Conveyance link

Image: Carrier panel. The Conveyances tab within the Carrier panel has been selected. It contains the Add Conveyance link.

Screen 40:

Select the VIN/Serial # field

Image: ACE Portal Accounts tab; Carrier panel. The Carrier panel contains the VIN/Serial # field.

Screen 41:

Select the check box

Image: ACE Portal Accounts tab; Carrier panel. Below the VIN/Serial # field is a checkbox next to the text, "Your use of the VIN/SERIAL # for the referenced conveyance constitutes your acknowledgement to CBP

that you are authorized to access this information." Text has been added to the VIN/Serial # field.

Screen 42:

Select the Search button

Image: ACE Portal Accounts tab; Carrier panel. Below the checkbox are two buttons: Search and Cancel.

Screen 43:

Select the Create Conveyance button

Image: ACE Portal Accounts tab; Carrier panel. Below the Search and Cancel buttons, two new buttons display: Create Conveyance and Cancel.

Screen 44:

Select the Conveyance # field

Image: ACE Portal Accounts tab; Carrier panel. The Carrier panel changes to display fields for creating a conveyance within ACE.

Screen 45:

Select the Conveyance Type combo box

Image: ACE Portal Accounts tab; Carrier panel. Text is added to the Conveyance # field.

Screen 46:

Select the Tractor item

Image: ACE Portal Accounts tab; Carrier panel.

Screen 47:

You must enter at least one license plate number.

Select the Add License Plate link

Image: ACE Portal Accounts tab; Carrier panel.

Screen 48:

Select the License Plate # field

Image: ACE Portal Accounts tab; Carrier panel. The Carrier panel changes to display fields for adding a license plate.

Screen 49:

Select the County of Registration combo box

Image: ACE Portal Accounts tab; Carrier panel. Text is added to the License Plate # field.

Screen 50:

Scroll down

Image: ACE Portal Accounts tab; Carrier panel.

Screen 51:

Select the USA item

Image: ACE Portal Accounts tab; Carrier panel.

Screen 52:

Select the State/Province box

Image: ACE Portal Accounts tab; Carrier panel. USA is selected in the County of Registration combo box.

Screen 53:

Scroll down

Image: ACE Portal Accounts tab; Carrier panel.

Screen 54:

Select the Virginia item

Image: ACE Portal Accounts tab; Carrier panel.

Screen 55:

Select the Continue > button

Image: ACE Portal Accounts tab; Carrier panel. Virginia is selected in the State/Province box. Two buttons exist below the State/Province box: Continue > and Cancel.

Screen 56:

The license plate number now appears in the License Plate # list. You can store more than one license plate for a conveyance by following the previous steps.

Select the Save button

Image: ACE Portal Accounts tab; Carrier panel. The added license plate information displays at the bottom of the Carrier panel. Below the added license plate information are two buttons: Save and Cancel.

Screen 57:

Once you select the Save button, your conveyance will be listed. You can continue adding conveyances to your account by following the previous steps.

Image: ACE Portal Accounts tab; Carrier panel.

Screen 58:

Equipment is defined in ACE as the instrument that contains the cargo being transported. For trucks, equipment usually includes trailers of all sorts, including dry cargo, tankers, flatbed trailers, and intermodal shipping containers.

Earlier in this lesson, you learned how to record a driver and a conveyance in an ACE account. Now, let's try an activity to see if you can record a piece of equipment in your ACE account.

Image: Dry freight Trailer with the words "World Freight Trucking, Incorporated" on the side.

Screen 59:

Now you want to record a piece of equipment in your ACE account.

Select the Equipment tab

Image: ACE Portal Accounts tab; Carrier panel. The Equipment tab is at the bottom of the Carrier panel.

Screen 60:

Select the Add Equipment link

Image: Carrier panel; Equipment tab. The Add Equipment link is in the Equipment tab.

Screen 61:

Select the Equipment # text box

Image: ACE Portal Accounts tab; Carrier panel. The Carrier panel now contains text boxes and buttons related to adding equipment to the carrier account.

Screen 62:

Select the Equipment Type combo box

Image: ACE Portal Accounts tab; Carrier panel. Text is added to the Equipment # text box.

Screen 63:

Scroll down

Image: ACE Portal Accounts tab; Carrier panel.

Screen 64:

Select the Trailer Dry Freight item

Image: ACE Portal Accounts tab; Carrier panel.

Screen 65:

Select the Vin/Serial # text box

Image: ACE Portal Accounts tab; Carrier panel. Trailer Dry Freight is selected in the Equipment Type combo box

Screen 66:

Select the Add License Plate link

Image: ACE Portal Accounts tab; Carrier panel. Text is added in the Vin/Serial # text box.

Screen 67:

Select the License Plate # text box

Image: ACE Portal Accounts tab; Carrier panel. The Carrier panel now contains text boxes and buttons related to adding license plate information for the newly added equipment.

Screen 68:

Select the Country of Registration combo box

Image: ACE Portal Accounts tab; Carrier panel. Text is added to the License Plate # text box.

Screen 69:

Scroll down

Image: ACE Portal Accounts tab; Carrier panel.

Screen 70:

Select the USA item

Image: ACE Portal Accounts tab; Carrier panel.

Screen 71:

Select the State/Province combo box

Image: ACE Portal Accounts tab; Carrier panel. USA is selected in the Country of Registration combo box

Screen 72:

Scroll down

Image: ACE Portal Accounts tab; Carrier panel.

Screen 73:

Select the West Virginia item

Image: ACE Portal Accounts tab; Carrier panel.

Screen 74:

Select the Continue > button

Image: ACE Portal Accounts tab; Carrier panel. West Virginia is selected in the State/Province combo box. Below the State/Province combo box are two buttons: Continue > and Cancel.

Screen 75:

You are now ready to record the new trailer in your ACE account.

Select the Save button

Image: ACE Portal Accounts tab; Carrier panel. The newly added equipment license plate information displays. Below this information are two buttons: Save and Cancel.

Screen 76:

The new equipment is listed. You can continue adding equipment to your account by following the previous steps.

Image: Carrier panel; Equipment tab.

Screen 77:

To Summarize...

You set up your account to receive notifications through the ACE portal.

You entered additional carrier information needed for your carrier Account.

You added driver/crew, conveyance, and equipment information to your Account.

Image: A clipboard with a stack of boxes.

Screen 78:

Knowledge Check

What travel documents are acceptable as a form of identification for adding a driver/crew member to your account?

- A) Birth Certificate, Passport, Laser Visa Card
- B) Permanent Residents Card, Citizenship Card, Re-entry Permit
- C) Refugee Permit, Other
- D) All of the above

The correct answer is D.

Screen 79:

Knowledge Check

How many forms of identification are required for adding a driver/crew member to your account?

- A) One
- B) Two
- C) Three
- D) Four

The correct answer is A.

Screen 80:

Knowledge Check

How many license plates can be added for each conveyance or piece of equipment in your ACE account?

- A) One
- B) Two
- C) Three
- D) Four

The correct answer is D.

Screen 81:

Knowledge Check

What type of information can be created and stored in the Carrier Details panel in your account for use when creating an e-manifest?

- A) Driver/Crew
- B) Conveyance/Equipment
- C) Shipper/Consignee
- D) All of the above

The correct answer is D.

Screen 82:

You have completed this lesson. In this lesson, you learned how to store crew, conveyance, and equipment data. You also learned how to set up notifications.

For more information, see the following section of the Online Help in the ACE portal:

- Carrier View: Accounts: Account List: SCAC Code Information

Image: A purple rectangle surrounding the text caption with a computer monitor, displaying the ACE logo, situated in the lower-right hand corner of the rectangle.

### ***Lesson 3: Creating a Complete Manifest***

#### Screen 1:

Lesson 3: Creating a Complete Manifest demonstrates the process of creating a manifest in the ACE Secure Data Portal. This lesson will guide you through the end-to-end process of creating and submitting an e-Manifest with all the required information.

After completing this lesson, you will be able to:

- Create a manifest.
- Save a manifest.
- Submit a manifest.

Image: A white rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the middle-left area of the rectangle.

#### Screen 2:

A manifest is made up of a Trip and Shipment.

Select each picture to learn more about the components of a manifest, a trip, and a shipment.

Image #1: A picture of a clipboard with the word "Manifest" above it.

Image #2: A truck with the word "Trip" above it.

Image #3: Two pallets of cartons with the word "Shipment" above it.

#### Rollover text #1:

Manifest - A manifest includes trip details and shipment information. A manifest submitted through the ACE portal becomes an e-Manifest.

#### Rollover text #2:

Trip - Trip details refers to the portion of the manifest that includes information regarding the trip, crew, equipment, and conveyance. In

the ACE portal, trip information is added by selecting Create a Manifest.

Rollover text #3:

Shipment - A shipment refers to the cargo information on a manifest. This includes the shipper and consignee information, as well as commodity details. In the ACE portal, a shipment is added by selecting Create a Manifest or Create a Shipment.

Screen 3:

The process flow below summarizes the various paths for creating an e-Manifest in the ACE portal. In this lesson, we will focus on the first branch of creating a complete manifest. You will learn more about the other paths in Lessons 4 through 6.

Image: Diagram of a flowchart showing the paths for creating an e-Manifest form with the individual blocks labeled. Creating a Manifest is broken into three processes. The first process is to 1) Complete Manifest (Lookup), 2) Save and Finish Later or Save and Submit Manifest. The second process is to 1) Create Trips (Lookup), 2) Save, 3) Return to Create Trips (Lookup) or Link Shipments and Trip, 4) Save and Finish Later or Save and Submit Manifest. The third process is to 1) Create Unassociated Shipments, 2) Save, 3) Return to Create Unassociated Shipments or Link Shipments and Trip, 4) Save and Finish Later or Save and Submit Manifest.

Screen 4:

You can complete a manifest when you know all of the trip and shipment information to associate with the manifest.

Select each element for more details.

Image: Diagram of a flowchart showing the paths for creating an e-Manifest form with the individual blocks labeled. Only the first process for Creating a Manifest is addressed.

Rollover text #1:

Create Manifest - When you log into the ACE portal to create a manifest, you have three choices. You can create complete manifests, create trips, or create shipments.

Rollover text #2:

Complete Manifest (Look Up) - If you know all of your trip and shipment information, you're able to create a complete manifest. You can add information manually, or by using the Lookup feature, which lets you quickly enter crew, conveyance, and equipment data, that has been pre-recorded in your account.

Rollover text #3:

Save and Finish Later - Do you need more information? You can save and edit the information as often as needed.

Rollover text #4:

Save and Submit Manifest - In the ACE portal, you can save and submit an e-Manifest. The Trade Act of 2002 requires the manifest to be submitted at least one hour before a truck arrives at the border.

Screen 5:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). WFT, Inc. is an ACE account and has access to the ACE portal via the Internet. WFT, Inc. transports recycled paper from Canada through the port of Buffalo, NY. A truck is scheduled to arrive at Buffalo later today, and you have information on the shipment, crew, conveyance, and equipment. You will now create an e-Manifest in the ACE portal.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 6:

You have logged into the ACE portal and are on the Home tab. Before you create a manifest for the first time, the Carrier information must be completed. If you need additional assistance with this, please view Lesson 2: Setting Up Records in the ACE Portal.

To create a manifest, you will need to navigate to the Manifest View which is on the Tools tab.

Select the Tools tab

Image: ACE Portal Home tab.

Screen 7:

Select the Manifest Tools link.

Image: ACE Portal Tools tab. The Tools tab is divided into two panels: Task Selector and User Access. The Manifest Tools link is located in the Task Selector panel.

Screen 8:

The Manifest tool displays the manifest information for the selected carrier account.

From here, you will select your account from the Accounts list.

Select the + next to CBP Incorporated

Image: ACE Portal Tools tab. Selecting the Manifest Tools link changed the Tools tab content. Four panels now display: Task Selector, Account Selector List, Manifest, and Shipment. CBP Incorporated is located in the Account Selector List panel in the Accounts section.

Screen 9:

Select the TRUCK AMS TEST CARRIER link

Image: ACE Portal Tools tab. The Accounts list is expanded to display three account hyperlinks.

Screen 10:

The Manifest and Shipment panels are populated with information relating to your account.

If you have any unsubmitted manifests or unassociated shipments, they would be listed here.

Select the Create Standard Manifest link

Image: ACE Portal Tools tab. The Create Standard Manifest link is in the Manifest panel.

Screen 11:

Trip #: Assigned by the carrier and always begins with the SCAC code. You don't have to enter the SCAC; it will be pre-populated for you to the left of the data field.

Est. date of arrival at first port in the U.S.: The date you expect the trip to arrive at the first port in the U.S.

Est. time of arrival at first port in the U.S.: The approximate time you expect the trip to arrive at the first port in the U.S.

First expected port of arrival: The port at which you expect the trip to arrive.

Select the Trip # text box

Image: Selecting the Create Standard Manifest link replaces the Manifest panel with the Manifest – Create Standard Manifest panel. The Manifest – Create Standard Manifest panel contains fields and radio buttons necessary for creating a manifest within ACE.

Screen 12:

Trip #: Assigned by the carrier and always begins with the SCAC code. You don't have to enter the SCAC; it will be pre-populated for you to the left of the data field.

Est. date of arrival at first port in the U.S.: The date you expect the trip to arrive at the first port in the U.S.

Est. time of arrival at first port in the U.S.: The approximate time you expect the trip to arrive at the first port in the U.S.

First expected port of arrival: The port at which you expect the trip to arrive.

Select the Est. date of arrival at first port in U.S. text box

Image: Manifest – Create Standard Manifest panel. Text is added to the Trip # text box.

Screen 13:

Trip #: Assigned by the carrier and always begins with the SCAC code. You don't have to enter the SCAC; it will be pre-populated for you to the left of the data field.

Est. date of arrival at first port in the U.S.: The date you expect the trip to arrive at the first port in the U.S.

Est. time of arrival at first port in the U.S.: The approximate time you expect the trip to arrive at the first port in the U.S.

First expected port of arrival: The port at which you expect the trip to arrive.

Select the Est. time of arrival at first port in U.S. text box

Image: Manifest – Create Standard Manifest panel. Text is added to the Est. date of arrival at first port in U.S. text box. This text is formatted as mm/dd/yyyy.

Screen 14:

Trip #: Assigned by the carrier and always begins with the SCAC code. You don't have to enter the SCAC; it will be pre-populated for you to the left of the data field.

Est. date of arrival at first port in the U.S.: The date you expect the trip to arrive at the first port in the U.S.

Est. time of arrival at first port in the U.S.: The approximate time you expect the trip to arrive at the first port in the U.S.

First expected port of arrival: The port at which you expect the trip to arrive.

You may either enter a port code or look it up. In this simulation, we are going to look up the Port of Buffalo, NY.

Select the Lookup Port Code link

Image: Manifest – Create Standard Manifest panel. Text is added to the Est. time of arrival at first port in U.S. text box. This text is formatted as hh:mm in local military time.

Screen 15:

Select the State combo box

Image: Selecting the Lookup Port Code link replaces the Manifest – Create Standard Manifest panel with the Manifest – Lookup Port Code panel. The State combo box is in the Manifest – Lookup Port Code panel.

Screen 16:

Scroll down

Image: Manifest – Lookup Port Code panel; State drop-down menu.

Screen 17:

Select the New York item

Image: Manifest – Lookup Port Code panel; State drop-down menu.

Screen 18:

Select the Search button

Image: Manifest – Lookup Port Code panel. The Search button is to the right of the State drop-down menu. New York is now selected in the State drop-down menu.

Screen 19:

Select the 0901-BUFFALO-NIAGARA FALLS radio button

Image: Manifest - Lookup Port Code panel. The port code and names associated with the selected state display below the State drop-down menu. Radio buttons display to the left of the port codes. The port codes and port names in New York are displayed.

Screen 20:

Scroll down

Image: Manifest - Lookup Port Code panel.

Screen 21:

Select the OK button

Image: Manifest - Lookup Port Code panel. Below the list of port code and names are two buttons: OK and Cancel.

Screen 22:

You can enter conveyance information by selecting either Lookup Conveyance or Create One-time Conveyance.

You will learn about the Lookup Conveyance link in Lesson 5: Creating a Trip. For now, we will create a one-time conveyance. You would use this when your conveyance information is not stored in your account.

Select the Create One-time Conveyance link.

Image: Selecting OK replaces the Manifest - Lookup Port Code panel with the Manifest - Create Standard Manifest panel. This panel is divided into sections, one of which is the Conveyance section. The Create One-time Conveyance link is in the Conveyance section.

Screen 23:

Select the Conveyance type combo box.

Image: Selecting the Create One-time Conveyance link replaces the Manifest - Create Standard Manifest panel with the Manifest - Create One-time Conveyance panel. This panel contains several text and combo boxes associated with creating a conveyance within ACE, including the Conveyance type combo box.

Screen 24:

Select the Tractor item.

Image: Manifest - Create One-time Conveyance panel; Conveyance type drop-down menu

Screen 25:

Select the VIN/Serial # text box

Image: Manifest - Create One-time Conveyance panel. Tractor is selected in the Conveyance type combo box.

Screen 26:

The conveyance information is complete. Now, add license plate information.

Select the License Plate # text box

Image: Manifest - Create One-time Conveyance panel. Text is added to the VIN/Serial # text box.

Screen 27:

Select the Country of Registration combo box.

Image: Manifest - Create One-time Conveyance panel. Text is added to the License Plate # text box.

Screen 28:

Scroll down

Image: Manifest - Create One-time Conveyance panel; Country of Registration drop-down menu.

Screen 29:

Select the USA item

Image: Manifest - Create One-time Conveyance panel; Country of Registration drop-down menu.

Screen 30:

Select the State/Province combo box

Image: Create One-time Conveyance panel. USA is selected in the Country of Registration combo box.

Screen 31:

Scroll down

Image: Create One-time Conveyance panel; State/Province drop-down menu.

Screen 32:

Select the Virginia item

Image: Create One-time Conveyance panel; State/Province drop-down menu.

Screen 33:

You are ready to add your conveyance to your manifest.

Note: Insurance information is only required if the shipment contains hazardous materials.

Select Continue button.

Image: Create One-time Conveyance panel. Virginia is selected in the State/Province combo box. The Continue button is at the bottom of this panel.

Screen 34:

Reporting Instruments of International Traffic (IIT) is conditional. If such instruments are being carried in this equipment, select one of the four options to identify whose bond will cover the instruments and whether the instruments are empty or part of other merchandise.

Seals used on equipment can also be reported in the Conveyance section.

Now, you will enter crew members. You can add a crew member by ID, lookup a crew member, or create a one-time crew member.

You will learn how to use the Lookup Crew Member feature in Lesson 5. You can add a crew member by ID if you know the number for one of the travel document options. These include: FAST Proximity Card Serial Number, Commercial Driver's License, certificate of naturalization, passport number, etc.

Scroll down.

Image: Selecting the Continue button returns you to the Manifest – Create Standard Manifest panel. A Conveyance ID (state initials and license plate #) is added to this page.

Screen 35:

Select the Create One-time Crew Member link.

Image: Manifest – Create Standard Manifest panel. The Create One-time Crew Member link is in the Crew member(s) section.

Screen 36:

Select the First name text box

Image: Selecting the Create One-time Crew Member link replaces the Manifest – Create Standard Manifest panel with the Manifest - Create One-time Crew Member panel. This panel contains fields and radio buttons necessary for adding a crew member to an ACE account, including the First name text box.

Screen 37:

Select the Last name text box

Image: Manifest - Create One-time Crew Member panel. Text is added in the First name text box.

Screen 38:

Select the Date of birth text box.

Image: Manifest - Create One-time Crew Member panel. Text is added in the Last name text box.

Screen 39:

Select the Citizenship/Nationality combo box.

Image: Manifest - Create One-time Crew Member panel. Text is added to the Date of birth text box in the mm/dd/yyyy format.

Screen 40:

Scroll down.

Image: Manifest - Create One-time Crew Member panel;  
Citizenship/Nationality drop-down menu.

Screen 41:

Select the USA item.

Image: Manifest - Create One-time Crew Member panel;  
Citizenship/Nationality drop-down menu.

Screen 42:

The US Address for Driver information is the crewmember's destination address. This is the physical location in the U.S. where a crewmember will actually be on this particular trip.

Examples of a destination address include a consignee's location, a hotel, a truck stop, a family, or friend's location.

Select the Address line 1 text box.

Image: Manifest - Create One-time Crew Member panel. USA is selected in the Citizenship/Nationality combo box.

Screen 43:

Select the City text box.

Image: Manifest - Create One-time Crew Member panel. Text is added to the Address line 1 text box.

Screen 44:

Select the State combo box.

Image: Manifest - Create One-time Crew Member panel. Text is added to the City text box.

Screen 45:

Scroll down.

Image: Manifest - Create One-time Crew Member; State drop-down menu.

Screen 46:

Select the Virginia item.

Image: Manifest - Create One-time Crew Member; State drop-down menu.

Screen 47:

Select the Zip/Postal code text box.

Image: Manifest - Create One-time Crew Member panel. Virginia is selected in the State combo box.

Screen 48:

Scroll down.

Image: Manifest - Create One-time Crew Member panel. Text is added to the Zip/Postal code text box.

Screen 49:

If the crew member is a driver, you will also need to enter driver's license information.

If the driver has an Enhanced Driver's License -- a license that also acts as a passport card, allowing land border crossings between the U.S. and Canada or the U.S. and Mexico -- select Yes for that question.

Select the Commercial Driver's License text box

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section.

Screen 50:

Select the No radio button next to Is this an Enhanced Driver's License?

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. Text is added to the Commercial Driver's License text box.

Screen 51:

Select the Country combo box.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. The No radio button associated with the question, "Is this an Enhanced Driver's License?" is selected.

Screen 52:

Scroll down.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. Country drop-down menu.

Screen 53:

Select the USA item.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. Country drop-down menu.

Screen 54:

Select the State/Province combo box.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. USA is selected in the Country combo box.

Screen 55:

Scroll down.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. State/Province drop-down menu.

Screen 56:

Select the Virginia item.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. State/Province drop-down menu.

Screen 57:

If the driver has a HAZ-MAT endorsement, select Yes and enter the endorsement code shown on the driver's license. For states and countries that do not issue a hazmat endorsement on the drivers license, 'Yes' is sufficient.

Scroll down.

Image: Manifest - Create One-time Crew Member panel; Driver Documentation section. Virginia is selected in the State/Province combo box.

Screen 58:

The Western Hemisphere Travel Initiative (WHTI) is a program among the U.S., Canada, and Mexico that allows simplified travel on land and sea entries within those countries. Along with the Enhanced Driver's License, the additional documentation requested here is a list of acceptable WHTI documents that may be presented at the border for entry into the U.S. At least one of these document types is required if the driver does not have an Enhanced Driver's License.

Select the Passport text box.

Image: Manifest - Create One-time Crew Member panel; Additional WHTI Documentation section.

Screen 59:

Select the Country combo box.

Image: Manifest - Create One-time Crew Member panel; Additional WHTI Documentation section. Text is added in the Passport text box.

Screen 60:

Scroll down.

Image: Manifest - Create One-time Crew Member panel; Additional WHTI Documentation section. Country drop-down menu is expanded.

Screen 61:

Select the USA item.

Image: Manifest - Create One-time Crew Member panel; Additional WHTI Documentation section. Country drop-down menu is expanded.

Screen 62:

Scroll down.

Image: Manifest - Create One-time Crew Member panel; Additional WHTI Documentation section. USA is selected in the Country combo box.

Screen 63:

You are now ready to submit the one-time crew member information.

Select the Continue button

Image: Manifest - Create One-time Crew Member panel. At the bottom of the panel are two buttons: Continue and Cancel.

Screen 64:

Scroll down

Image: Selecting Continue returns you to the Manifest - Create Standard Manifest panel.

Screen 65:

Your crew member is now listed under the Crew Member(s) section. To add more than one crew member, you can repeat the previous steps. When you have multiple crew members, you are required to designate which crew member is the 'person in charge'.

The Passenger(s) section is only required if you have a passenger. There is also no lookup option for passengers.

Select the Create One-time Passenger link

Image: Manifest - Create Standard Manifest panel; Passenger(s) section. The Create One-time Passenger link is in the Passenger(s) section of this panel.

Screen 66:

Select the First name text box.

Image: Selecting the Create One-time Passenger link replaces the Manifest - Create Standard Manifest panel with the Manifest - Create One-time Passenger panel. This panel contains text boxes and buttons associated with adding a one-time passenger to your ACE account, including the First name text box.

Screen 67:

Select the Last name text box.

Image: Manifest - Create One-time Passenger panel. Text is added to the First name text box.

Screen 68:

Select the Date of birth text box.

Image: Manifest - Create One-time Passenger panel. Text is added to the Last name text box.

Screen 69:

Select the Citizenship/Nationality combo box

Image: Manifest - Create One-time Passenger panel. Text is added to the Date of birth text box in the mm/dd/yyyy format.

Screen 70:

Scroll down.

Image: Manifest - Create One-time Passenger pane ; Citizenship/Nationality drop-down menu.

Screen 71:

Select the USA item.

Image: Manifest - Create One-time Passenger panel; Citizenship/  
Nationality drop-down menu.

Screen 72:

Select the Passport text box.

Image: Manifest - Create One-time Passenger panel. USA is selected in  
the Citizenship/Nationality combo box.

Screen 73:

Select the Country combo box.

Image: Manifest - Create One-time Passenger panel. Text is added to  
the Passport text box.

Screen 74:

Scroll down.

Image: Manifest - Create One-time Passenger; Country drop-down  
menu.

Screen 75:

Select the USA item.

Image: Manifest - Create One-time Passenger; Country drop-down  
menu.

Screen 76:

Scroll down.

Image: Manifest - Create One-time Passenger panel. USA is selected in the Country combo box.

Screen 77:

Select the Continue button.

Image: Manifest - Create One-time Passenger panel. There are two buttons at the bottom of this panel: Continue and Cancel.

Screen 78:

Equipment is the next section. This section is optional because it is only applicable if the conveyance is separate from the equipment. In this example, the trip has equipment.

Select the Create One-time Equipment link

Image: Selecting Continue returns you to the Manifest - Create Standard Manifest panel. The Create One-time Equipment link is in the Equipment(s) section of this panel.

Screen 79:

Select the Type combo box

The Type field contains a combo box listing the available types of equipment. The Number text box is used for the identifying number for the equipment.

Image: Selecting the Create One-time Equipment link replaces the Manifest - Create Standard Manifest panel with the Manifest - Create One-time Equipment panel. This panel contains text boxes and combo boxes necessary for adding one-time use equipment to your ACE account, including the Type combo box.

Screen 80:

Scroll down.

Image: Manifest - Create One-time Equipment panel; Type drop-down menu.

Screen 81:

Select the Trailer Dry Freight item.

Image: Manifest - Create One-time Equipment panel; Type drop-down menu.

Screen 82:

Select the Number text box.

Image: Manifest - Create One-time Equipment panel. Trailer Dry Freight is selected in the Type combo box.

Screen 83:

You are able to enter up to four license plates for your equipment.

Select the License Plate # text box

Image: Manifest - Create One-time Equipment panel. Text is added to the Number text box.

Screen 84:

Select the Country of Registration combo box

Image: Manifest - Create One-time Equipment panel. Text is added to the

Screen 85:

Scroll down

Image: Manifest - Create One-time Equipment panel; Country of Registration drop-down menu.

Screen 86:

Select the USA item

Image: Manifest - Create One-time Equipment panel; Country of Registration drop-down menu.

Screen 87:

Select the State/Province combo box

Image: Manifest - Create One-time Equipment panel. USA is selected in the Country of Registration combo box.

Screen 88:

Select the Idaho item

Image: Manifest - Create One-time Equipment panel; State/Province drop-down menu.

Screen 89:

A Seal number is a valid exporter/carrier number associated with the container/equipment. Each number is unique and associated with the container/equipment after inspection.

Reporting Instruments of International Traffic (IIT) is conditional. If such instruments are being carried in this equipment, select one of the four options to identify whose bond will cover the instruments and whether the instruments are empty or part of other merchandise

Select the Continue button

Image: Manifest - Create One-time Equipment panel. Idaho is selected in the State/Province combo box. There are two buttons at the bottom of the panel: Continue and Cancel.

Screen 90:

Scroll down.

Image: Selecting Continue returns you to the Manifest - Create Standard Manifest panel.

Screen 91:

The final section to complete is the Shipment(s) section. Shipment information is only required if you are carrying a shipment.

If you had a shipment already created, you could link that shipment to the manifest. You'll learn more about this in Lesson 6 - Linking an Unassociated Shipment to a Trip.

Note: As creating a manifest can be a long process, it is recommended that you select the Save & Continue button while you are creating your manifest. That way, if the system times out for any reason, you don't lose your work.

Select the Create Shipment link

Image: Manifest - Create Standard Manifest; Shipment(s) panel. The Create Shipment link is in the Shipment(s) section of this panel.

Screen 92:

Your first option is Shipment release type. For this exercise, we will use the default PAPS. You will learn more about other available shipment types in Lesson 8: Designating a Shipment Type.

For PAPS shipments, the Shipment Control Number (SCN) is usually the PAPS number or PRO bill number.

Note: The broker must use the same number the carrier uses in the SCN field so that the Entry and manifest match in ACE.

Two fields are required in order to start entering a shipment:

Shipment control # (SCN): This number is designated by the carrier and is pre-populated with the SCAC of the carrier.

Port/ Point of loading: The port or point at which merchandise is loaded on the conveyance that will cross the border.

Select the Shipment control # text box

Image: Shipment - Create Standard Shipment; Shipping Information  
Selecting the Create Shipment link replaces the Manifest - Create Standard Manifest panel with the Shipment - Create Standard Shipment panel. This panel contains text boxes and combo boxes necessary for adding shipment information to your ACE account, including the Shipment control # text box.

Screen 93:

Shipment identifier: This number is intended to simply be passed through to the entry filer via the Broker Download process and is for Trade informational purposes only.

It is required that the Schedule K number, the International Air Transport Association (IATA) Code (the 3-letter airport code), or the specific location where the merchandise was loaded be used for the Port/ Point of loading.

Select the Port/ Point of loading combo box

Image: Shipment - Create Standard Shipment panel. Text is added to the Shipment control # text box.

Screen 94:

Select the Schedule K item.

Image: Shipment - Create Standard Shipment panel; Port/ Point of loading drop-down menu.

Screen 95:

Select the Port/ Point of loading text box.

Image: Shipment - Create Standard Shipment panel. Schedule K is selected in the Port/ Point of loading combo box.

Screen 96:

Place of receipt: City where carrier took receipt of goods.

Service type: Enter if applicable.

Transfer destination FIRMS code: Required if cargo is moving in-bond or a local transfer is being requested

Scroll down

Image: Shipment - Create Standard Shipment panel. Text is added to the Port/ Point of loading text box.

Screen 97:

An ACE ID or Data Universal Numbering System (DUNS) number can be used with the understanding that the address details will not be displayed to the carrier and that the address that is in an ACE importer, broker, or carrier account will be reported to CBP.

Select the Name text box

Image: Shipment - Create Standard Shipment panel; Shipper section.

Screen 98:

If you will be using a particular shipper frequently, you will save time by obtaining their ACE ID or DUNS number.

Select the Address line 1 text box

Image: Shipment - Create Standard Shipment panel. Text is added to the Name text box.

Screen 99:

Select the City text box

Image: Shipment - Create Standard Shipment panel. Text is added to the Address line 1 text box.

Screen 100:

Select the Country combo box

Image: Shipment - Create Standard Shipment panel. Text is added to the City text box.

Screen 101:

Scroll down

Image: Shipment - Create Standard Shipment panel; Country drop-down menu.

Screen 102:

Select the Canada item

Image: Shipment - Create Standard Shipment panel; Country drop-down menu.

Screen 103:

Select the State/Province combo box

Image: Shipment - Create Standard Shipment panel. Canada is selected in the Country combo box.

Screen 104:

Select the Ontario item

Image: Shipment - Create Standard Shipment panel; State/Province drop-down menu.

Screen 105:

Select the Zip/Postal code text box.

Image: Shipment - Create Standard Shipment panel. Ontario is selected in the State/Province combo box.

Screen 106:

Scroll down.

Image: Shipment - Create Standard Shipment panel. Text is added in the Zip/Postal code text box.

Screen 107:

Now you will need to enter the consignee information. An ACE ID or DUNS number can be used with the understanding that the address details will not be displayed to the carrier and the address that is in an ACE importer, broker or carrier account will be reported to CBP.

Select the Name text box

Image: Shipment - Create Standard Shipment panel; Consignee section.

Screen 108:

Select the Address line 1 text box

Image: Shipment - Create Standard Shipment panel. Text is added in the Name text box.

Screen 109:

Select the City text box

Image: Shipment - Create Standard Shipment panel. Text is added in the Address line 1 text box.

Screen 110:

Select the Country combo box

Image: Shipment - Create Standard Shipment panel. Text is added in the City text box.

Screen 111:

Scroll down

Image: Shipment - Create Standard Shipment panel; Country drop-down menu.

Screen 112:

Select the USA item

Image: Shipment - Create Standard Shipment panel; Country drop-down menu.

Screen 113:

Select the State/Province combo box

Image: Shipment - Create Standard Shipment panel. USA is selected in the Country combo box.

Screen 114:

Scroll down

Image: Shipment - Create Standard Shipment panel; State/ Province drop-down menu.

Screen 115:

Select the New York item.

Image: Shipment - Create Standard Shipment panel; State/ Province drop-down menu.

Screen 116:

Select the Zip/Postal code text box.

Image: Shipment - Create Standard Shipment panel. New York is selected in the State/ Province combo box.

Screen 117:

Party is an optional section which provides an opportunity for additional communication between you and the Customs entry filer, other carriers and CBP. You will learn more about adding a party in Lesson 7: Adding a Party.

Scroll down

Image: Shipment - Create Standard Shipment panel. Text is added in the Zip/Postal code text box.

Screen 118:

The Select Equipment by combo box lets you add the commodity to a shipment four different ways:

- Conveyance
- Account
- Create One Time
- Trip

Select the Select Equipment by combo box

Image: Shipment - Create Standard Shipment panel; Equipment section.

Screen 119:

Select the Trip item

Image: Shipment - Create Standard Shipment panel; Select Equipment by drop-down menu.

Screen 120:

When adding commodities to the shipment you need to identify whether the cargo is loaded in the conveyance, equipment, or multiple pieces of equipment (such as tandem trailers).

If you have not previously recorded a piece of equipment in the trip section of the manifest, you can look-up a piece of equipment from your account or add a new piece of equipment by selecting Create One Time from the Select Equipment by combo box.

Select the Add button

.Image: Shipment - Create Standard Shipment panel. Trip is selected in the Select Equipment by combo box.

Screen 121:

The equipment you added earlier is displayed.

Select the radio button

Image: The Shipment - Create Standard Shipment panel is replaced with the Manifest – Select Trip Equipment panel. A radio button next to the equipment is in this panel. Below the equipment are two buttons: Continue and Cancel.

Screen 122:

Select the Continue button

Image: The Manifest – Select Trip Equipment panel.

Screen 123:

Select the Continue button

Image: The Manifest – Select Trip Equipment panel is replaced with the Manifest – Edit One-time Equipment panel. This panel allows you to edit the equipment information. At the bottom of this panel are two buttons: Continue and Cancel.

Screen 124:

Scroll down

Image: Selecting Continue returns you to the Shipment – Edit Standard Shipment panel.

Screen 125:

Now we will enter the commodity information.

Select the Add Commodity link

Image: Shipment – Edit Standard Shipment panel; Commodity section. The Add Commodity link is in the Commodity section.

Screen 126:

Select the Shipment quantity text box

Image: Shipment – Edit Standard Shipment panel is replaced by the Manifest – Edit Standard Shipment Commodity panel. This panel contains text boxes necessary to add commodity information to your ACE account.

Screen 127:

Select the Shipment quantity combo box

Image: Manifest – Edit Standard Shipment Commodity panel. Text is added to the Shipment quantity text box.

Screen 128:

Select the Pieces item

Image: Manifest – Edit Standard Shipment Commodity panel; Shipment quantity drop-down menu.

Screen 129:

Select the Weight text box

Image: Manifest – Edit Standard Shipment Commodity panel. Pieces is selected in the Shipment quantity combo box.

Screen 130:

Select the Weight combo box

Image: Manifest – Edit Standard Shipment Commodity panel. Text is added to the Weight text box.

Screen 131:

Select the Pounds item

Image: Manifest – Edit Standard Shipment Commodity; Weight drop-down menu.

Screen 132:

Select the Description text box.

Image: Manifest – Edit Standard Shipment Commodity panel. Pounds is selected in the Weight combo box.

Screen 133:

If your commodity is a vehicle, you must provide the Vehicle Identification Number (VIN).

Marks & Numbers refers to the marks and numbers that appear on the smallest external package of the commodity.

Scroll down

Image: Manifest – Edit Standard Shipment Commodity panel. Text is added to the Description text box.

Screen 134:

If your commodity is a hazardous material, you must fill out the HAZ-MAT information.

Select the Continue button

Image: Manifest – Edit Standard Shipment Commodity panel. At the bottom of this panel are two buttons: Continue and Cancel.

Screen 135:

Scroll down

Image: The Manifest – Edit Standard Shipment Commodity panel is replaced with the Shipment – Create Standard Shipment panel.

Screen 136:

If a shipment is unable to fit on a truck, you can split the shipment by specifying a boarded quantity. You will learn more about this in Lesson 9: Split Shipment.

Select the Continue button

You are ready to add your shipment to your manifest.

Image: Shipment – Create Standard Shipment panel. At the bottom of this panel are two buttons: Continue and Cancel.

Screen 137:

You have completed all sections and fields required for creating a manifest. You are almost ready to submit the manifest to CBP.

Scroll down

Image: Selecting Continue returns you to the Manifest – Create Standard Manifest panel.

Screen 138:

There are four buttons which give you options for how to proceed with your manifest.

Check for Errors

Choose this option when you are ready to submit to CBP. This will validate that all required fields have been completed.

#### Save & Finish Later

Choose this option if you are still waiting on some information and are not ready to submit.

#### Save & Continue

Choose this option during the process to ensure that you don't lose your work. It is recommended that you use Save & Continue after adding each shipment.

#### Cancel

Choose this option to exit the process. This will cause you to lose any unsaved information.

Select the Check for Errors button

Image: Manifest – Create Standard Manifest panel. At the bottom of this panel are four buttons: Check for Errors, Save & Finish Later, Save & Continue, and Cancel.

Screen 139:

The ACE portal has completed its validation of your data. If there were any errors, you would have received an error message in red at the top of the screen.

To submit the manifest, you will need to scroll down one more time.

Scroll down

Image: The Manifest – Create Standard Manifest panel is replaced with the Manifest – Review Standard Manifest panel. At the bottom of this panel are two buttons: Send to Customs and Change Information.

Screen 140:

Select the Send to Customs button

Image: The Manifest – Review Standard Manifest panel.

Screen 141:

You have successfully submitted an e-Manifest! You now have the option to print your manifest cover sheet. It is required that the cover sheet of the e-Manifest accompany your paper manifest when crossing the border.

Select the Print Cover Sheet button

Image: The Manifest – Review Standard Manifest panel is replaced with the Manifest – Standard Manifest Submitted to Customs Successfully panel. There are three buttons in this panel: Print, Print Cover Sheet, and Ok.

Screen 142:

You can select the print button to print the cover sheet. Once you have finished printing, close the Adobe Acrobat reader.

Select the Close button

Image: ACE Electronic Manifest - Cover Sheet.

Screen 143:

Select the OK button

Image: The Manifest – Standard Manifest Submitted to Customs Successfully panel.

Screen 144:

You are returned to the Manifest View. From here, you can create a new manifest or exit the ACE portal. The trips listed in the Manifest panel are trips which have not yet been submitted to CBP.

Note: (The following steps are not shown in this example) To view a trip which has already been submitted, follow these steps:

- From the Filter Manifest section at the top of the Manifest View screen, select 'Completed' from the Filing Status drop-down list.
- Then, select the Filter Manifests button to search for the Trip #.

Image: Manifest panel.

Screen 145:

To Summarize...

You are familiar with the various sections of an e-Manifest.

You entered the information required for conveyance, crew and passengers.

You filled out the required information for equipment.

You learned the basic information needed to complete the shipment information.

You sent a completed manifest to CBP.

Image: Clipboard and a Stack of boxes.

Screen 146:

Knowledge Check

Which of the following includes all sections of a manifest?

- A) Origin, Destination, License Plate, Control Number, Quantity
- B) Trip, Destination, Conveyance, Equipment, Quantity
- C) Trip, Conveyance, Crew member, Passenger, Equipment, Shipment
- D) Crew member, Passenger, Conveyance, Equipment, Destination

The correct answer is C.

Screen 147:

Knowledge Check

Which of the following selections includes the basic information needed to complete the Shipment section of a manifest?

- A) Conveyance, Equipment, Quantity
- B) Origin, Destination, Quantity
- C) City, State/Province, Country
- D) Shipper, Consignee, Commodity

The correct answer is D.

Screen 148:

You have completed this lesson. In this lesson, you learned how to create, save, and submit a manifest.

For more information, see the following section of the Online Help in the ACE portal:

- Manifests: Working with Standard Manifests

Image: Computer monitor displaying the ACE logo.

## ***Lesson 4: Creating an Unassociated Shipment***

### Screen 1:

#### Lesson 4: Creating an Unassociated Manifest

In Lesson 4: Creating an Unassociated Shipment you will learn the process of creating a shipment using the Shipment panel in the ACE Secure Data Portal. An unassociated shipment is not linked to a trip and, therefore, cannot be submitted to CBP until it is attached to a trip to complete a manifest.

After completing Lesson 4: Creating an Unassociated Shipment, you will be able to:

- Create a shipment.

Image: Computer monitor displaying the ACE logo.

### Screen 2:

The process flow below summarizes the various paths for creating an e-Manifest in the ACE portal. In this lesson, we will focus on the lower branch of creating an Unassociated Shipment. You will learn more about the other paths in Lessons 3, 5, and 6.

Image: The three process flows summarizing the various paths for creating an e-Manifest form in the ACE portal are depicted with their individual process' labeled below:

Create Manifest; Complete Manifest (Lookup); Save and Finish Later, and Save and Submit Manifest.

Create Manifest; Create Trips (Lookup); Save; Link Shipments and Trip; Save and Finish Later, and Save and Submit Manifest

Create Manifest; Create Unassociated Shipments; Save; Link Shipments and Trip; Save and Finish Later, and Save and Submit Manifest.

Image: Diagram summarizing the three process flows for creating an e-Manifest form in the ACE portal with their individual process' labeled:

Screen 3:

The portion of the process flow in the foreground summarizes the steps to create a shipment.

Select each element for more details:

Rollover text #1:

Create Manifest:

-When you log into the ACE portal to create a manifest, you have three choices. You can create complete manifests, create trips, or create shipments.

Rollover text #2:

Create Unassociated Shipments:

-You can create unassociated shipments before you create trips. You may want to create these types of shipments if you do not have or do not know the trip information.

Rollover text #3:

Save:

-You can save a shipment at any time and return to the ACE Portal to edit the information later.

Image: The portion of the process flow summarizing the steps to create a shipment: (Create Manifest; Create Unassociated Shipments, and Save)

Screen 4:

The end-to-end process for creating an unassociated shipment is depicted. Select each step to view more details.

Adding a Party is not a required step, but it is an additional feature for matching an entry to a shipment. This is covered in Lesson 7: Adding a Party.

Rollover text #1:

Select Shipment Type:

-There are 11 shipment types available: BCS, BRASS, PAPS, Pre-filed Inbond, Sec 321 Informal, Consolidated Shipment, GN1 Exceptions, Goods Astray, 7523 Entry and Manifest of Merchandise Free of Duty, 3299 Declaration for Free Entry of Unaccompanied Articles, and 3311 Declaration for Free Entry of Returned American Products.

Rollover text #2:

Add Shipment Information:

-The shipment information is where the Shipment Control Number (SCN) and Port/Point of Loading are required.

Rollover text #3:

-Add Shipper and Consignee:

Must include shipper and consignee address and contact information.

Rollover text #4:

Add Party:

-Provides information to other parties, including entry filers, other Carriers, or CBP. This feature allow you to send information to the entry filer to match the entry to the shipment.

Rollover text #5:

-Add Equipment:

Associate a piece of equipment to a shipment. The commodity is added to the shipment by adding it to the piece of equipment.

Rollover text #6:

Save Equipment:

After completing the required sections, save the shipment information to later associate it with a trip.

Image: Six tabs illustrating the process flow summarizing the various paths for creating an e-Manifest in the ACE portal with each tab labeled: (Select Shipment Type; Add Shipment Information; Add Shipper and Consignee; Add Party; Add Equipment, and Save Equipment

Screen 5:

Let's focus just on the Add Equipment step:

This step is required to associate a piece of equipment and/or conveyance to the shipment. This is because the commodity is

associated with a shipment by first associating it with the equipment and/or conveyance.

### Add Commodity

Image: The six tabs summarizing the process flow for creating an e-Manifest in the ACE portal. All tabs are 'grayed out' with the exception of the fifth tab, 'Add Equipment', which is highlighted with a down-arrow pointing to a block identified as 'Add Commodity.'

Screen 6:

### Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). WFT, Inc. makes a weekly trip from Canada to the port of Buffalo. You receive PRO bills [Shipment Control Numbers (SCNs)] for shipments destined for the port of Buffalo, and enter them into the ACE portal as they are received.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 7:

Select the Tools tab

You log into the ACE portal and the Home tab displays. Before you create a shipment for the first time, the carrier setup information must be completed. If you need additional assistance with this, please review Lesson 2: Setting Up Records in the ACE Portal.

To create a shipment, you will need to navigate to the Manifest tool.

Image: ACE Secure Data Portal Tools tab

Screen 8:

Select the Select the Manifest Tools link

Image: ACE Secure Data Portal Tools tab; Task Selector

Screen 9:

Select the + next to CBP Incorporated

Image: ACE Secure Data Portal Tools tab; Account Selector List

Screen 10:

Select the TRUCK AMS TEST CARRIER link

Image: ACE Secure Data Portal Tools tab; Account Selector List

Screen 11:

Select the Create Standard Shipment link

The Manifest and Shipment panels are populated with information related to your account.

You are able to create a shipment from the Shipment panel.

Image: Selecting the Create Standard Shipment link replaces the Shipment panel with the Shipment – Create Standard Shipment panel.

Screen 12:

Select the Shipment control # text box

When creating a standard shipment, you need to complete all required fields. Required fields are marked with an asterisk (\*).

The first required field is the Shipment release type. The default shipment release type is PAPS, or Pre-Arrival Processing System. For this shipment, we will keep this shipment release type.

The Shipment control # (SCN) and the Port/Point of loading are the only required Shipping Information fields.

The SCN is designated by the carrier, and should begin with the SCAC. It correlates to a master bill number.

The Port/Point of loading is the place at which merchandise is loaded on the conveyance that will cross the border.

Image: Shipment – Create Standard Shipment panel.

Screen 13:

Select the Port/ Point of loading combo box

Image: Shipment – Create Standard Shipment panel.

Screen 14:

Select the Schedule K item

Image: Shipment – Create Standard Shipment; Port/Point of Loading drop-down menu

Screen 15:

Select the Port/ Point of loading text box

Image: Shipment – Create Standard Shipment

Screen 16:

Scroll down

It is very important that the number that is entered into the Shipment Control # field is relayed to the customs broker or entry filer so that it is entered in the bill of lading or PAPS number field of the customs entry. It is this number by which the entry is matched with the manifest shipment record. The Bill Control # field should not be used unless you have coordinated with the entry filer to use master/house bill combinations.

Scroll down to view the Shipper section

Image: Shipment – Create Standard Shipment

Screen 17:

Select the Name text box

The Shipper section is where you provide information about the company requesting the shipment of goods. You can either enter an ID or enter the full address information.

Image: Shipper panel.

Screen 18:

Select the Address line 1 text box

Image: Shipper panel.

Screen 19:

Select the City text box

Image: Shipper panel.

Screen 20:

Select the Country combo box

Image: Shipper panel.

Screen 21:

Scroll down

Image: Shipper; Country combo box drop-down menu

Screen 22:

Select the Canada item

Image: Shipper; Country combo box drop-down menu

Screen 23:

Select the State/Province combo box

Image: Shipper panel.

Screen 24:

Select the Ontario item

Image: Shipper panel.

Screen 25:

Select the Zip/Postal code text box

Image: Shipper panel.

Screen 26:

Scroll down

An ACE ID or Data Universal Numbering System (DUNS) number can be used with the understanding that the address details will not be

displayed to the carrier and that the address that is the ACE importer, broker, or carrier account will be reported to CBP.

You will need to scroll down to view the Consignee section.

Image: Shipper panel.

Screen 27:

Select the Name text box

The consignee is the entity to which the shipment is being delivered. Again, you can either enter an ID or enter the name and address information.

Image: Consignee panel.

Screen 28:

Select the Address line 1 text box

Image: Consignee panel.

Screen 29:

Select the City text box

Image: Consignee panel.

Screen 30:

Select the Country combo box

Image: Consignee panel

Screen 31:

Scroll down

Image: Consignee panel.

Screen 32:

Select the USA item

Image: Consignee panel.

Screen 33:

Select the State/Province combo box

Image: Consignee panel.

Screen 34:

Scroll down

Image: Consignee panel.

Screen 35:

Select the Pennsylvania item

Image: Consignee panel.

Screen 36:

Select the Zip/Postal Code text box

Image: Consignee panel.

Screen 37:

Scroll down

The Consignee section is complete.

Party is an optional section which provides an opportunity for additional communication between you and the entry filer, other carriers, and CBP. It is here that you can identify the customs broker or self-filing importer in order to send a copy of your shipment record to the entry filer's Automated Broker Interface (ABI) system. This is often referred to as "Broker Download". You will learn more about adding a party in Lesson 7: Adding a Party.

Image: Consignee panel.

Screen 38:

Select the Select Equipment by combo box

We are ready to add equipment to this shipment. If you do not know the equipment information at this time, you will be able to come back to this section after you link the unassociated shipment to a manifest.

To begin adding the equipment, choose how the equipment will be added.

Image: Equipment panel.

Screen 39:

Select the Account item

The Select Equipment by combo box drop-down menu allows you to add the commodity to a shipment three different ways:

- If your shipment will be added directly to a conveyance, select Conveyance.
- If your shipment will be added to equipment stored in your account, select Account
- If your shipment will be added to equipment not stored in your account, select Create One Time.

Image: Equipment panel.

Screen 40:

Select the Add button

Image: Shipment – Create Standard Shipment; Equipment panel.

Screen 41:

Select the Type combo box

You can search your account for stored equipment by filling out as many or as few of the fields listed. If you do not choose any fields, all stored equipment will be displayed.

Image: Shipment – Lookup Equipment panel.

Screen 42:

Scroll down

Image: Shipment – Lookup Equipment panel; drop-down menu

Screen 43:

Select the Trailer Dry Freight item

Image: Shipment – Lookup Equipment panel; drop-down menu

Screen 44:

Select the Continue button

Image: Selecting the Continue button replaces the Shipment – Lookup Equipment panel with the Shipment – Select Existing Equipment panel.

Screen 45:

Select the radio button

Select the equipment to add it to your shipment

Image: Shipment – Select Existing Equipment panel.

Screen 46:

Select the Add to Shipment button

You are ready to add this equipment to your shipment

Image: Selecting the Add to Shipment link replaces the Shipment – Select Existing Equipment panel with the Shipment – Edit One-time Equipment panel.

Screen 47:

Select the Continue button

Image: Selecting the Continue button replaces the Shipment – Edit One-time Equipment panel with Shipment – Create Standard Shipment panel.

Screen 48:

Scroll down

Now that your equipment has been selected, you are able to add a commodity to this equipment

Image: Shipment – Create Standard Shipment

Screen 49

Select the Add Commodity link

Image: Selecting the Add Commodity link replaces the Commodity panel with the Shipment – Edit Standard Shipment Commodity panel.

Screen 50

Select the Shipment quantity text box

Fill out the commodity information, including quantity, weight, and a generic description

Image: Shipment – Edit Standard Shipment Commodity

Screen 51

Select the Shipment Quantity combo box

Image: Shipment – Edit Standard Shipment Commodity

Screen 52

Select the Roll item

Image: Shipment – Edit Standard Shipment Commodity drop-down menu

Screen 53

Select the Weight text box

Image: Shipment – Edit Standard Shipment Commodity

Screen 54

Select the Weight combo box

Image: Shipment – Edit Standard Shipment Commodity

Screen 55

Select the Kilograms item

Image: Shipment – Edit Standard Shipment Commodity drop-down menu

Screen 56

Select the Description text box

Image: Shipment – Edit Standard Shipment Commodity

Screen 57

Scroll down

Image: Shipment – Edit Standard Shipment Commodity

Screen 58

Select the Continue button

Image: Selecting the Continue button replaces the Shipment – Edit Standard Shipment Commodity panel with the Shipment – Create Standard Shipment panel.

Screen 59

Scroll down

You have finished creating a shipment.

You are able to save this shipment in the ACE portal and come back to it later when you are ready to link it to a trip.

Image: Shipment – Create Standard Shipment

Screen 60

Select the Save button

Image: Selecting the Save button replaces the Shipment – Create Standard Shipment panel with the Shipment panel.

Screen 61

Your shipment is listed in the Shipment panel. It will remain listed here until it is linked to a trip

Image: Shipment Panel

Screen 62

To Summarize...

You added commodity information to a piece of equipment that was not associated to a trip.

You have identified the piece of equipment this shipment will be loaded into and you have added and associated specific commodities to this equipment

Image: A clipboard representing a Manifest and a stack of boxes representing a Shipment

Screen 63

Knowledge Check

What number is used to connect a carrier's manifest shipment record or records to a Customs Broker or Entry Filer's Pre-filed Customs Entry?

- A) Trip Number
- B) Equipment Number
- C) Conveyance Number

D) Shipment Control Number

The correct answer is D.

Screen 64

Knowledge Check

How many forms of identification are required for adding a driver/crew member to your account?

A) One

B) Two

C) Three

D) Four

The correct answer is A.

Screen 65

For more information, see the following section of the Online Help in the ACE portal: Manifests: Shipments

You have completed this lesson. In this lesson, you learned how to Create a shipment that is not associated to a manifest.

Image: Computer monitor displaying the ACE logo

## ***Lesson 5: Creating a Trip***

### Screen 1:

#### Lesson 5: Creating a Trip

In Lesson 5: Creating a Trip, you will learn the process of creating trip, crew, conveyance, and equipment information using the Lookup capability in the ACE Secure Data Portal. If you plan to use the same crew, conveyance, or equipment information frequently, you may want to store this information in your account. The procedure for creating these records is described in Lesson 2: Setting Up Records in the ACE Portal.

After completing Lesson 5: Creating a Trip, you will be able to:

- Create a Trip using Lookups.

Image: A white rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the middle-left side of the rectangle.

### Screen 2:

The process flow below summarizes the various paths for creating an e-Manifest in the ACE portal. In this lesson, we will focus on the lower branch of creating an Unassociated Shipment. You will learn more about the other paths in Lessons 3, 5, and 6.

The three process flows summarizing the various paths for creating an e-Manifest form in the ACE portal are depicted with their individual process' labeled below:

Create Manifest; Complete Manifest (Lookup); Save and Finish Later, and Save and Submit Manifest.

Create Manifest; Create Trips (Lookup); Save; Link Shipments and Trip; Save and Finish Later, and Save and Submit Manifest

Create Manifest; Create Unassociated Shipments; Save; Link Shipments and Trip; Save and Finish Later, and Save and Submit Manifest.

Image: Diagram summarizing the three process flows for creating an e-Manifest form in the ACE portal with their individual process' labeled.

Screen 3:

The portion of the process flow in the foreground summarizes the steps to create a trip.

Select each element for more details.

Rollover text #1:

Create Manifest:

When you log into the ACE portal to create a manifest, you have three choices. You can create complete manifests, create trips, or create shipments.

Rollover text #2:

Create Trips (Lookup):

You can create trips before you know all your shipment information. The lookup feature lets you quickly enter crew, conveyance, and equipment information if it has been pre-created in your account.

Rollover text #3:

Save:

You can save a shipment at any time and return to the ACE Portal to edit the information later.

Screen 4:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). WFT, Inc. makes a weekly trip from Canada to the port of Buffalo.

You dispatch Jacob Greene, a WFT, Inc. truck driver, for a pickup at their warehouse. You create the trip in the ACE portal. Once Jacob arrives, he will contact you to let you know which shipments he will be carrying.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 5:

Select the Create Standard Manifest link

You have logged into the ACE portal and navigated to the Manifest tool, and selected the appropriate account.

Image: Selecting the Create Standard Manifest link replaces the ACE Secure Data Portal Tools tab; Manifest Tool panel with the Manifest – Create Standard Manifest panel.

Screen 6:

Select the Trip # text box

Image: Manifest – Create Standard Manifest panel.

Screen 7:

Select the Est. date of arrival at first port in U.S. text box

When creating a standard manifest, you need to complete all required fields. These fields are marked with an asterisk (\*).

The trip number is assigned by the carrier and always begins with the Standard Carrier Alpha Code (SCAC). You do not need to enter the

SCAC; it is pre-populated for you, as you can see on the screen to the left of the Trip # text box.

Image: Manifest – Create Standard Manifest panel.

Screen 8:

Select the Est. time of arrival at first port in U.S. text box

Image: Manifest – Create Standard Manifest panel.

Screen 9:

Select the First expected port of arrival text box

Image: Manifest – Create Standard Manifest panel.

Screen 10:

Select the Lookup Conveyance link

Next, you will enter conveyance information. The first expected port of arrival must be reported by using the Schedule D code. If you do not know the Schedule D code you can use the "Lookup Port Code" link to find the proper code. You will want to use the Lookup Conveyance feature, which lets you search for conveyance information you have previously entered into your ACE account.

Lesson 2: Setting Up Records in the ACE Portal describes how to save conveyance, crew, and equipment information in your ACE account.

Image: Selecting the Lookup Conveyance link replaces the Manifest – Create Standard Manifest panel with the Manifest – Lookup Conveyance panel.

Screen 11:

Select the Type combo box

Depending on the volume of information you have entered into your account, you may want to further narrow your search before executing it. You can type the Conveyance ID code in the ID: field and select Search. In this example, we will search for tractors

Image: ACE Secure Data Portal Tools tab; Manifest – Lookup Conveyance panel.

Screen 12:

Select the Tractor item

Image: ACE Secure Data Portal Tools tab; Manifest – Lookup Conveyance panel drop-down menu.

Screen 13:

Select the Search button

Image: Selecting the Search button replaces the ACE Secure Data Portal Tools tab; Manifest – Lookup Conveyance panel with the Manifest – Select Conveyance panel.

Screen 14:

Select the Radio button

Your stored conveyance information displays. Select a conveyance to add to your trip.

Image: ACE Secure Data Portal Tools tab; Manifest – Select Conveyance panel.

Screen 15:

Select the Add Selected to Trip button

Image: Selecting the Add Selected to Trip button replaces the ACE Secure Data Portal Tools tab; Manifest – Select Conveyance panel with the Manifest – Create Standard Manifest panel.

Screen 16:

Scroll down

Note: The Conveyance ID displays the state and license plate number as a link that will return you to the Conveyance Details screen

Image: Manifest – Create Standard Manifest panel.

Screen 17:

Select the Lookup Crew Member link

Next, you will enter the crew members. Like conveyances, you will want to use the Lookup Crew Member option.

Image: Selecting the Lookup Crew Member link replaces the Manifest – Create Standard Manifest panel with the Manifest – Lookup Crew Member panel.

Screen 18:

Select the Last name text box

The more specific the information supplied in the search field, the more accurate the list of retrieved information will be.

Image: Manifest – Lookup Crew Member panel.

Screen 19:

Select the Search button

Select Search to retrieve a complete list of all drivers in your account. To narrow down a search, type information on any of the fields provided as we have done here.

Image: Selecting the Search button replaces the Manifest – Lookup Crew Member panel with the Manifest – Select a Crew Member panel.

Screen 20:

Select the radio button

Your search results display. Select a crewmember to add him to your trip

Image: Manifest – Select a Crew Member panel.

Screen 21:

Select the Add to Trip button

Image: Selecting the Add to Trip button replaces the Manifest – Select a Crew Member panel with the Manifest – Edit One-time Crew Member panel.

Screen 22:

Scroll to the right

You must enter valid address information for all crew members on this trip. The fields with an asterisk (\*) are required

Image: Manifest – Edit One-time Crew Member panel.

Screen 23:

Select the Address line 1 text box

Image: Manifest – Edit One-time Crew Member panel.

Screen 24:

Select the City text box

Image: Manifest – Edit One-time Crew Member panel

Screen 25:

Select the State combo box drop-down menu.

Image: Manifest – Edit One-time Crew Member panel.

Screen 26:

Select the District of Columbia State item

Image: Manifest – Edit One-time Crew Member panel.

Screen 27:

Select the Zip/Postal code text box

Image: Manifest – Edit One-time Crew Member panel.

Screen 28:

Scroll down

Image: Manifest – Edit One-time Crew Member

Screen 29:

Select the Continue button

Image: Selecting the Continue button replaces the Manifest – Edit One-time Crew Member panel with the Manifest – Create Standard Manifest panel.

Screen 30:

Scroll down

Image: Manifest – Create Standard Manifest panel.

Screen 31:

Select the Add Crew Member by ID link

We can also add a crew member by searching for any ID number. For example, we can search for a crew member by Passport Number

Image: Selecting the Add Crew Member by ID link replaces the Manifest – Create Standard Manifest panel with the Manifest – Add Crew Member by Document ID panel.

Screen 32:

Select the Travel document combo box drop-down menu.

Image: Manifest – Add Crew Member by Document ID panel.

Screen 33:

Select the Passport item from the drop-down menu.

Image: Manifest – Add Crew Member by Document ID panel.

Screen 34:

Select the Travel document # text box

Image: Manifest – Add Crew Member by Document ID panel.

Screen 35:

Select the Country combo box drop-down menu.

When searching for crew member by passport, the passport country is required.

Image: Manifest – Add Crew Member by Document ID panel.

Screen 36:

Scroll down

Image: Manifest – Add Crew Member by Document ID panel.

Screen 37:

Select the USA item

Image: Manifest – Add Crew Member by Document ID panel.

Screen 38:

Select the Continue button

Image: Selecting the Continue button replaces the Manifest – Add Crew Member by Document ID panel with the Manifest – Edit One-time Crew Member panel.

Screen 39:

Scroll to the Right

Image: Manifest – Edit One-time Crew Member panel.

Screen 40:

Select the Address line 1 text box

Image: Manifest – Edit One-time Crew Member panel.

Screen 41:

Select the Address line 2-text box

Image: Manifest – Edit One-time Crew Member panel.

Screen 42:

Select the City text box

Image: Manifest – Edit One-time Crew Member panel.

Screen 43:

Select the State combo box drop-down menu.

Image: Manifest – Edit One-time Crew Member panel.

Screen 44:

Scroll down

Image: Manifest – Edit One-time Crew Member panel.

Screen 45:

Select the Virginia item

Image: Manifest – Edit One-time Crew Member panel.

Screen 46:

Select the Zip/Postal code text box

Image: Manifest – Edit One-time Crew Member panel.

Screen 47:

Scroll down

Image: Manifest – Edit One-time Crew Member panel.

Screen 48:

Select the Continue button

Image: Selecting the Continue button replaces the Manifest – Edit One-time Crew Member panel with the Manifest – Create Standard Manifest panel.

Screen 49:

Scroll down

Image: Manifest – Create Standard Manifest panel.

Screen 50:

Select the Lookup Equipment link

Passenger(s) is the next section. This is an optional field, and you will skip it because Jacob does not have a passenger riding with him.

Equipment(s) is a conditionally mandatory section. Any equipment on the trip must be entered. In this example you will want to enter equipment information using the Lookup Equipment feature.

Image: Selecting the Lookup Equipment link replaces the Manifest – Create Standard Manifest panel with the Manifest – Lookup Trip Equipment panel.

Screen 51:

Select the Type combo box drop-down menu.

If your account only has one equipment type saved, you can select Continue, however for this example, we will look for Dry Freight Trailers.

Image: Manifest – Lookup Trip Equipment panel.

Screen 52:

Scroll down

Image: Manifest – Lookup Trip Equipment panel.

Screen 53:

Select the Trailer Dry Freight item from the drop-down menu.

Image: Manifest – Lookup Trip Equipment panel.

Screen 54:

Select the Continue button

Image: Selecting the Continue button replaces the Manifest – Lookup Trip Equipment panel with the Manifest – Select Trip Equipment panel.

Screen 55:

Select the Radio button under the Equip. #/License Plate # panel.

Image: Manifest – Select Trip Equipment panel.

Screen 56:

Select the Add To Manifest button

Image: Selecting the Add to Manifest button will replace the Manifest – Select Trip Equipment panel with the Manifest – Create Standard Manifest panel.

Screen 57:

Scroll down

Your equipment type has been added and you are returned to the Manifest - Create Standard Manifest screen.

Scroll down to view the rest of the screen.

Image: Manifest – Create Standard Manifest panel.

Screen 58:

Select the Save & Finish Later button

Because you do not know your shipment information, you will want to save your trip and complete it later.

Note: Selecting Save & Finish Later will save your work and return you to the first screen in the Manifest section.

Selecting Save and Continue is useful for saving your work while filling out the e-Manifest. It is recommended to save your information often to ensure that you don't lose any work.

Selecting Cancel will exit the displayed screen without saving entered information.

Image: Selecting the Save & Finish Later button replaces the Manifest – Create Standard Manifest panel with the Manifest panel.

Screen 59:

The Manifest panel defaults to list manifests that have a status of "Preliminary," that is, they have not yet been submitted to CBP. Your manifest will remain listed here until you submit it to CBP, at which point its status will change to "Completed".

Image: Manifest panel.

Screen 60:

To Summarize...

You filled out the required information for the trip using the Lookup features.

You saved trip information to which you can attach shipment records to at a later time.

You learned where to find manifests in the preliminary status, which means that a shipment has not yet been associated with a trip.

Image: Clipboard and a Stack of Boxes

Screen 61:

Knowledge Check

Which of the following is a required field under Trip information?

- A) Estimated date of arrival at first port in the U.S.
- B) Estimated time of arrival at first port in the U.S.
- C) First expected port of arrival
- D) All are required fields

The correct answer is D.

Screen 62

Knowledge Check

What type of information does the Lookup feature let you quickly enter if it has been pre-recorded in your account?

- A) Crew, Conveyance, Equipment
- B) Crew, Destination, Equipment
- C) Conveyance, Equipment, Trip
- D) Destination, Equipment, Trip

The correct answer is A.

Screen 63:

Knowledge Check

What code or number assigned by the carrier is at the beginning of a Trip Number?

- A) ACE ID

- B) DOT Number
- C) Randomly Generated Number
- D) SCAC

The correct answer is D.

Screen 64:

Knowledge Check

What is the correct format for a Trip Number?

- A) 12/12/2007Truck1
- B) Alphanumeric Only
- C) 12 AB 12345
- D) 12345-A

The correct answer is B.

Screen 65:

You have completed this lesson. In this lesson, you learned how to create a trip using lookups.

For more information, see the following sections of the Online Help in the ACE portal:

- Looking up and Selecting a Conveyance.
- Looking up and Selecting Crew Members.
- Looking up and Selecting Equipment.

Select Exit to return to the Lesson Menu

Image: Computer monitor displaying the ACE logo



## ***Lesson 6: Linking an Unassociated Shipment to a Trip***

### Screen 1:

#### Lesson 6: Linking an Unassociated Shipment to a Trip

:Lesson 6: Linking an Unassociated Shipment to a Trip demonstrates the process of linking an unassociated shipment to a trip to create a complete manifest ready for submission to CBP.

After completing Lesson 6: Linking an Unassociated Shipment to a Trip, you will be able to:

- Access a saved manifest.
- Edit a manifest
- Look up a shipment
- Save the trip

Image: White rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the middle-left side of the rectangle.

### Screen 2:

The process flow below summarizes the various paths for creating an e-Manifest in the ACE portal. In this lesson, we will focus on the steps to take if you have completed the parts of a manifest and are ready to link them together. The other paths are covered in Lessons 3, 4, and 5.

Image: The three process flows summarizing the paths for creating an e-Manifest form in the ACE portal are depicted below:

Create Manifest; Complete Manifest (Lookup); Save and Finish Later, and Save and Submit Manifest.

Create Manifest; Create Trips (Lookup); Save; Link Shipments and Trip; Save and Finish Later, and Save and Submit Manifest

Create Manifest; Create Unassociated Shipments; Save; Link Shipments and Trip; Save and Finish Later, and Save and Submit Manifest.

### Screen 3:

The portion of the process flow in the foreground summarizes the steps to Create a Trip: Link Shipments and Trip; Save and Submit Manifest, and Save and Finish Later

Select each element for more details.

Rollover text #1:

Link Shipments and Trip:

When you are ready you can link a shipment to a trip.

Rollover text #2:

Save and Finish Later:

If you are not ready to submit, you can save your manifest and return to it at your convenience.

Rollover text #3:

Save and Submit Manifest:

In the ACE Portal you can save and submit an e-Manifest. The Trade Act of 2002 requires that the manifest be submitted at least one hour before the truck arrives at the border.

Image: The process flows summarizing the paths for creating a Trip in the ACE portal are depicted (Link Shipments and Trip, Save and Finish Later, and Save and Submit Manifest).

### Screen 4:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). One of your drivers, Jacob Greene, has picked up a shipment from the exporter. He contacts you in the dispatch office, and informs you of the shipment he is going to take to Buffalo. You search for the trip you previously created in the ACE portal, and add the shipment to this trip. You now have a complete

manifest, and WFT, Inc. is ready to make its weekly trip from Canada to the port of Buffalo. You submit the manifest.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 5:

Select the Tools tab

When you log into the ACE portal, the Home tab displays. To create a manifest, you will need to navigate to the Manifest tool.

Image: ACE Secure Data Portal Tools tab.

Screen 6:

Select the Manifest Tools link

Image: ACE Secure Data Portal Tools tab; Task Selector

Screen 7:

Select the + to expand CBP Incorporated

Image: ACE Secure Data Portal Tools tab; Accounts

Screen 8:

Select the TRUCK AMS TEST CARRIER link

Image: ACE Secure Data Portal Tools tab; Accounts

Screen 9:

Select the > text box

The Manifest and Shipment panels are populated with information related to your account.

As you can see, the Manifest panel lists manifests that have not yet been submitted to CBP.

A manifest selected from the Manifest panel can be reviewed, edited, completed, or submitted as necessary.

In this case, move to page 2 of the Manifest panel to access the trip we want.

Image: ACE Secure Data Portal, Manifest panel

Screen 10:

Select the XXXT20090529 link

Image: ACE Secure Data Portal, Manifest panel

Screen 11:

Select the Edit button

The manifest appears in a view mode. You will need to edit the manifest to lookup a shipment.

Image: Manifest – View Standard Manifest

Screen 12:

Scroll down

The information now showing is from the manifest you created in Lesson 5: Creating a Trip. You know that the only information needed to complete this manifest is shipment information

Image: Manifest – Edit Standard Manifest

### Screen 13:

Select the Lookup Shipment(s) link

Under the Shipment(s) section, you have the option to Lookup Shipment(s). This will let you search for an existing unassociated shipment.

Image: Selecting the Lookup Shipment(s) link replaces the Manifest – Edit Standard Manifest panel with the Manifest – Lookup Shipments panel.

### Screen 14:

Select the check box

Only unassociated shipments appear. You can select a shipment, or filter shipments by:

Image: Manifest – Lookup Shipments panel. The Manifest – Lookup Shipments panel contains check boxes necessary for adding your unassociated shipment to the manifest.

### Screen 15:

Select the Add Selected button

Image: Selecting the Add Selected button replaces the Manifest – Lookup Shipments panel with the Manifest – Edit Standard Manifest panel.

### Screen 16:

Scroll down

Now that the shipment has been added to the trip, you need to associate it with the equipment in the trip. Scroll down to the shipment section.

Image: Manifest – Edit Standard Manifest panel.

Screen 17:

Select the XXXT20090602 link

Image: Selecting the XXXT20090602 link replaces the Manifest – Edit Standard Manifest panel with the Shipment – Edit Standard Shipment panel.

Screen 18:

Scroll down

Image: Shipment – Edit Standard Shipment panel.

Screen 19:

Select the Select Equipment by combo box drop-down menu.

Now we need to select the Equipment associated with this trip.

Image: Shipment – Edit Standard Shipment; Equipment panel.

Screen 20:

Select the Trip item from the drop-down menu.

Image: Shipment – Edit Standard Shipment; Equipment panel.

Screen 21:

Select the Add button

Image: Selecting the Add button replaces the Shipment – Edit Standard Shipment; Equipment panel with the Manifest – Select Trip

Equipment panel. The Manifest – Select Trip Equipment panel contains radio buttons to select the equipment for this trip.

### Screen 22:

Select the radio button

On the Manifest - Select Trip Equipment panel, select the equipment for this trip

Image: Manifest – Select Trip Equipment

### Screen 23:

Select the Continue button

Image: Selecting the Continue button replaces the ACE Secure Data Portal Tools tab; Manifest – Select Trip Equipment panel with the Manifest – Edit One-time Equipment panel.

### Screen 24:

Select the Continue button

Image: Selecting the Continue button replaces the ACE Secure Data Portal Tools tab; Manifest – Select Trip Equipment panel with the Shipment – Edit Standard Shipment panel.

### Screen 25:

Scroll down

Image: Manifest – Select Trip Equipment

### Screen 26:

Select the Continue button

Image: Selecting the Continue button replaces the Shipment – Edit Standard Shipment panel with the Manifest – Edit Standard Manifest panel

### Screen 27:

You are returned to your manifest. Scroll down to review your manifest information once more before submitting to CBP

Scroll down

Scroll down

Image: Manifest – Edit Standard Manifest panel.

### Screen 28:

Select the Check For Errors button

The shipment you just linked to your manifest is listed under the Shipment(s) section.

You are almost ready to submit to CBP, but first you will want to check your information for errors.

Note: It is usually a good idea to select Save & Continue before checking for errors.

Image: Selecting the Check for Errors button replaces the Manifest – Edit Standard Manifest panel with the Manifest – Review Standard Manifest panel.

### Screen 29:

Scroll down

The ACE portal has validated your entries, and returned no errors.

Note: If errors had been found, they would appear in red in the upper left corner of the Manifest panel.

Image: Manifest – Review Standard Manifest panel.

Screen 30:

Select the Send to Customs button

You are ready to submit to CBP.

Image: Selecting the Send to Customs button replaces the Manifest – Review Standard Manifest panel with the Manifest – Standard Manifest Submitted to Customs Successfully panel.

Screen 31:

Select the Ok button

Your manifest has been submitted to CBP. You are brought to the Manifest - Standard Manifest Submitted to Customs Successfully panel.

You now have the option to print your e-Manifest cover sheet. Remember, it is required that the cover sheet of the e-Manifest accompany your paper manifest when crossing the border.

An Adobe Acrobat version of your manifest will open in a new window. You can print this document from your computer.

To print from Adobe Acrobat, select File > Print.

After closing out of the Adobe Acrobat manifest that opened in separate window, you are returned to the Manifest - Standard Manifest Submitted to Customs Successfully panel. Select OK once you are done to return to the Manifest panel.

We will skip printing in this simulation and simply select OK.

Image: Selecting the OK button replaces the Manifest – Standard Manifest Submitted to Customs Successfully panel to the Manifest panel.

Screen 32:

You are returned to the main Manifest panel. From here, you can create a new manifest, or you can exit the ACE portal.

Congratulations, you have successfully linked an unassociated shipment to a trip.

Image: Manifest Panel

Screen 33:

To Summarize...

- You accessed a saved manifest to edit and link to a shipment.
- You edited the manifest using the Lookup feature to add a shipment.
- You saved the manifest and submitted it to CBP

Image: A clipboard and a stack of boxes.

Screen 34:

Knowledge Check

Which feature do you use to link an unassociated shipment to a trip?

- A) Attach
- B) Save
- C) Lookup
- D) Add

Correct answer is C.

Screen 35:

Knowledge Check

When you perform a Lookup Shipments function, what type of shipments display?

- A) All Types
- B) Unassociated
- C) Incomplete
- D) Unattached

Correct answer is B.

Screen 36:

Knowledge Check

Where can you find a list of saved manifests that are waiting to be submitted?

- A) Account Tab
- B) Manifest Panel
- C) Transaction Tab
- D) Shipment Panel

Correct answer is B.

Screen 37:

You have completed this lesson. In this lesson, you learned how to link an unassociated shipment and a trip to complete a manifest.

For more information, see the following section of the Online Help in the ACE portal:

- Looking up and Selecting Shipments

Image: A purple rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the lower-right hand side of the rectangle.

## ***Lesson 7: Adding a Party***

Screen 1:

Lesson 7: Adding a Party

Lesson 7: Adding a Party, demonstrates the functionality available to add a party to a shipment. Adding a party is an optional field used to communicate with the entry filer, other carriers, and CBP. Adding party information is necessary to facilitate Broker Download, Secondary Notify Party, or just providing name and address information which indicates an additional party related to the shipment

After completing Lesson 7: Adding a Party, you will be able to:

- Determine when you would want to add an additional party to a shipment.
- Add an additional party to a shipment

Image: Computer monitor displaying the ACE logo.

Screen 2:

Adding a Party is an optional process that adds an additional interested party to a shipment. It is used to communicate with the entry filer, other carriers, and CBP.

Select each element for more details.

- Broker Download
- Secondary Notify Party
- Additional Party

Rollover text #1:

Broker Download:

Enables shipment data, reported by the carrier, to be forwarded to the Automated Commercial System (ACS) entry filer. The ACS entry filer is identified by the carrier. A filer can use this information when filing an entry, ensuring the entry matches the manifest information.

Rollover text #2:

Secondary Notify Party:

Enables status notifications from CBP to be sent to an identified Standard Carrier Alpha Code (SCAC).

Rollover text #3:

Additional Parties:

Additional Parties to the shipment such as the consignee - can be added to the shipment to provide CBP with name and address information.

Let's go to the ACE Portal

Image: Three blue oblongs labeled: 1) Broker Download  
2) Secondary Notify Party, and 3) Additional Party identifying the interested parties to a shipment.

Screen 3:

Scroll down

You have navigated to the Shipment - Create Standard Shipment panel. Your next task, adding a party, is an option that is available when you create a shipment.

Image: Shipment – Create Standard Shipment panel.

Screen 4:

Select the Add Party link

Image: Selecting the Add Party link replaces the Shipment – Create Standard Shipment panel with the Add Party – Select Party Type panel.

Screen 5:

Select the Add Party link

Image: Add Party – Select Party Type panel.

Screen 6:

Select the Broker Download item drop-down menu.

You would choose Broker Download when you want to provide an entry filer with information regarding your shipment. You will need to provide a filer code, a port code, and optionally, an office code for the broker for this information to be accurately routed to the entry filer.

Image: Add Party – Select Party Type dropdown menu.

Screen 7:

Select the Go button

Image: Selecting the Go button replaces the Add Party – Select Party Type panel with the Shipment – Add Party panel.

Screen 8:

Select the Filer code text box

When the Broker Download party type is selected, the Filer code and Port code are required, and the Office code is an optional field. With this information, your broker can now receive your shipment information including your shipment control number and piece count. This number is important for reconciling the shipment to the entry.

Image: Shipment - Add Party panel.

Screen 9:

Select the Port Code text box

Image: Shipment - Add Party panel.

Screen 10:

Select the Continue button

Image: Selecting the Continue button replaces the Shipment - Add Party panel with the Shipment – Create Standard Shipment panel.

Screen 11:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 12:

Select the Add Party link

Image: Selecting the Add Party link replaces the Shipment – Create Standard Shipment panel with the Add Party – Select Party Type panel.

Screen 13:

Select the Party type combo box drop-down menu.

Image: Add Party – Select Party Type

Screen 14:

Select the Secondary Notify Party item from the drop-down menu.

You would add a Secondary Notify Party if you wanted another carrier to receive CBP status notifications regarding this shipment. You may want to do this if another carrier will be receiving your shipment.

Image: Add Party – Select Party Type panel.

Screen 15:

Select the Go button

Image: Add Party – Select Party Type panel.

Screen 16:

Select the SCAC text box

The only data information required for Secondary Notify Party is the SCAC

Image: Shipment – Add Party panel.

Screen 17:

Select the Continue button

Image: Selecting the Continue button replaces the Shipment – Add Party panel with the Shipment – Create Standard Shipment panel.

Screen 18:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 19:

Select the Add Party link

You will need to add another party to look at the next party type.

Image: Selecting the Add Party link replaces the Shipment – Create Standard Shipment panel with the Add Party – Select Party Type panel.

Screen 20:

You would add an Additional Party for the purpose of reporting the name and address of an entity that is identified in the transaction.

Select the Party type combo box drop-down menu.

Image: Add Party – Select Party Type panel.

Screen 21:

Select the Additional Party item

Image: Add Party – Select Party Type drop-down menu.

Screen 22:

Select the Go button

Image: Selecting the Go button replaces the Add Party – Select Party Type panel with the Shipment – Add Party panel.

Screen 23:

Select the Entity Identifier combo box drop-down menu.

From the Shipment - Additional Party screen, there are a number of additional party types to choose from. Once you choose the party type, you are able to add name and address information of the additional party

Image: Shipment - Add Party panel.

Screen 24:

Scroll down

A drop-down menu displays a list of additional party selections. Choose one to add to your shipment for information purposes. Use Ultimate Consignee in this example.

Image: Shipment - Add Party drop-down menu.

Screen 25:

Select the Ultimate Consignee item

Image: Shipment - Add Party; Entity Identifier drop-down menu.

Screen 26:

Select the Name text box

The Shipment - Additional Party panel requires full name and address information.

Image: Shipment - Add Party panel.

Screen 27:

Select the Country combo box drop-down menu.

Image: Shipment - Add Party panel.

Screen 28:

Scroll down

Image: Shipment - Add Party; Country drop-down menu

Screen 29:

Select the USA item

Image: Shipment - Add Party; Country drop-down menu

Screen 30:

Select the Address line 1 text box

Image: Shipment - Add Party panel.

Screen 31:

Select the City text box

Image: Shipment - Add Party panel.

Screen 32:

Select the State/Province combo box drop-down menu.

Image: Shipment - Add Party panel.

Screen 33:

Select the Maryland item

Image: Shipment - Add Party drop-down menu

Screen 34:

Select the Zip/Postal text box

Image: Shipment – Shipment – Add Party panel.

Screen 35:

Select the Continue button

Image: Selecting the Continue button will replace the Shipment - Add Party panel with the Shipment – Create Standard Shipment panel.

Screen 36:

Scroll down to view the added parties.

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 37:

Congratulations! You have completed adding a party for Broker Download, Secondary Notify Party and Additional Party.

Image: Shipment – Create Standard Shipment; Party panel

Screen 38:

To Summarize...

- You added an entry filer to receive Broker Download data.
- You added a carrier to receive Customs status information on a shipment.
- You added the details of another party to the shipment record.

Image: Clipboard and a Stack of boxes.

Screen 39:

Knowledge Check

Which of the following is NOT a reason for adding a party to a shipment?

- A) To let another carrier receive information regarding your shipment.
- B) To document additional passengers.
- C) To identify for CBP who is the importer of record.
- D) To provide a broker with information regarding your shipment.

Correct answer is B.

Screen 40:

Knowledge Check

Which Adding a Party type enables an entry filer to receive shipment information from a carrier?

- A) Broker Download
- B) Secondary Notify Party
- C) Entry Filer Information
- D) Additional Party

Correct answer is A.

Screen 41:

Knowledge Check

What manifest data element must match between the carrier's shipment record and the filer's customs entry?

- A) Trip Number
- B) Weight
- C) Port Point of Loading
- D) Shipment Control Number

Correct answer is D.

Screen 42:

Knowledge Check

What is the Secondary Notify Party feature used for?

- A) Provide notification of the second time a shipment changes status.
- B) Enables status notifications from CBP to an identified SCAC.

C) Notifies the entry filer of the matching Shipment Control Number for the entry.

D) Add additional information for parties associated with the manifest.

Correct answer is B.

Screen 43:

You have completed this lesson. In this lesson, you learned how to add a party to a shipment.

For more information, see the following section of the Online Help in the ACE portal:

- Manifests: Shipments: Working with Standard Shipments

Image: A purple rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the lower-right hand corner of the rectangle.

## ***Lesson 8: Designating a Shipment Type***

Screen 1:

Lesson 8: Designating a Shipment Type, demonstrates the process of designating a shipment type in the ACE Secure Data Portal. The shipment type selected will affect the commodity information required for completing the shipment information in the ACE portal.

After completing Lesson 8: Designating a Shipment Type, you will be able to:

- Choose the appropriate shipment type for your shipment
- Identify the unique commodity information required based on shipment type

Image: A white rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the left-hand part of the rectangle.

Screen 2:

There are 11 types of shipments available for selection:

- Border Cargo Selectivity (BCS)
- Border Release Advanced Selectivity System (BRASS)
- Pre-Arrival Processing System (PAPS)
- Pre-filed Inbond
- Section 321 Informal
- Consolidated Shipment
- GNI Exemptions
- Goods Astray
- 7523 Entry and Manifest of Merchandise Free of Duty
- 3299 Declaration for Free Entry of Unaccompanied Articles
- 3311 Declaration for Free Entry of Returned American Products

Image: Two pallets stacked with boxes.

Screen 3:

We will now go to the Shipment — Create Standard Shipment panel displayed with the Manifest tool and look at each Shipment Release Type.

In this lesson, we will identify the commodity information required for each shipment type, but we will not create shipments. To review how to create a shipment, return to Lesson 3: Creating a Complete Manifest; or Lesson 4: Creating an Unassociated Shipment.

Image: A white rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the left-hand part of the rectangle.

Screen 4:

Scroll down

Shipment Release Type is a required selection in the ACE portal and is always filled in. This selection defaults to PAPS, or Pre-Arrival Processing System.

Image: Shipment – Create Standard Shipment panel.

Screen 5:

Select the Add Commodity link

From the Commodity section in the Shipment panel, you are able to add a commodity.

Image: Selecting the Add Commodity link replaces the Shipment – Create Standard Shipment panel with the Shipment – Edit Standard Shipment Commodity panel.

Screen 6:

You are now at the Shipment - Edit Standard Shipment Commodity panel.

The default commodity requirements are:

- Shipment quantity:
- Weight: (Cargo Gross Weight)
- Description: (of Cargo)

Now, we will change the shipment release type to BCS, or Border Cargo Selectivity.

Image: Selecting Next to continue replaces the Shipment – Edit Standard Shipment Commodity panel and replaces it with the Shipment – Create Standard Shipment panel.

Screen 7:

Select the Change button

You are back to the Shipment - Create Standard Shipment panel. Select Change to change the release type

Image: Selecting the Change button replaces the Shipment – Create Standard Shipment panel with the Change Shipment Release Type panel.

Screen 8:

You are now at the Change Shipment Release Type panel.

Select the Shipment release type combo box.

The available shipment release types display in the combo box drop-down menu.

Image: Change Shipment Release Type panel.

Screen 9:

Select the Select the BCS item

Image: Change Shipment Release Type drop-down menu.

Screen 10:

Select the Continue button

By selecting Continue, you will change your release type to BCS.

Image: Selecting the Continue button replaces the Change Shipment Release Type panel with the Shipment –Create Standard Shipment panel.

Screen 11:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 12:

The shipment release type selection will be changed to BCS. For a BCS shipment, you must add the broker or entry filer's Pre-filed entry number at the bottom of the shipment screen. BCS shipments have the same required fields on the Commodity screen as PAPS. To review those fields look at the PAPS Shipment type, found at the beginning of this topic.

Now, we will change the shipment release type to BRASS, or Border Release Advanced Selectivity System.

Image: Shipment – Create Standard Shipment panel.

Screen 13:

Select the Change button

You are back to the Shipment - Create Standard Shipment panel. Change the shipment release type again. This time make it at BRASS shipment.

Image: Selecting the Change button replaces the Shipment – Create Standard Shipment panel with the Change Shipment Release Type panel.

Screen 14:

Select the Shipment release type combo box drop-down menu.

Image: Change Shipment Release Type panel.

Screen 15:

Select the BRASS item

Image: Change Shipment Release Type; drop-down menu

Screen 16:

Select the Continue button

By selecting Continue you will change your release type to BRASS.

Image: Selecting the Continue button replaces the Change Shipment Release Type panel with the Shipment – create Standard Shipment panel.

Screen 17:

Scroll down

By selecting BRASS as your shipment type, you have changed your required options on the Commodity screen.

Review the new requirements. BRASS shipments have a Common Carrier Commodity Code (C4) associated with them. By changing your shipment type to BRASS, you are now required to enter a C4 code.

Image: Shipment – Create Standard Shipment panel.

Screen 18:

Select the Add Commodity link

Image: Selecting the Add Commodity link replaces the Shipment – Create Standard Shipment; Commodity panel with the Shipment – Edit Standard BRASS Commodity panel.

Screen 19:

Unlike other shipment types, BRASS shipments require a C4 code.

Now we will look at the next shipment type.

Now, we will change the shipment release type to Consolidated Shipment.

Image: Shipment – Edit Standard BRASS Commodity panel.

Screen 20:

Select the Change button

You are back to the Shipment - Create Standard Shipment panel. A consolidated shipment is used when reporting the Master Bill of Lading of a Freight Consolidation that is not moving In-bond.

Look at the Consolidated Shipment release type.

Image: Selecting the Change button replaces the Shipment – Create Standard Shipment panel with the Change Shipment Release Type panel.

Screen 21:

Select the Shipment release type combo box

Image: Change Shipment Release Type panel.

Screen 22:

Select the Consolidated Shipment item

Image: Change Shipment Release Type; drop-down menu

Screen 23:

Select the Continue button.

By selecting the Continue button you will change your release type to Consolidated Shipment. The consolidated shipment should only be used when reporting the Master bill of lading of a Freight Consolidation that is not moving In-bond. Be sure to report all House bills of lading as separate shipments. A shipment identified as Release Type: Consolidation should only contain a Shipment Control Number (Master bill of lading).

Look at the shipment screen

Image: Selecting the Continue button replaces the Change Shipment Release Type panel with the Shipment – Create Standard Shipment panel.

Screen 24:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 25:

Consolidated shipments cannot be split shipments. Therefore, the Boarded quantity field is not available.

We will skip looking at the commodity screens since the requirements are identical to PAPS.

Now, we will change the shipment release type to Section 321, also known as an Informal.

Image: Shipment – Create Standard Shipment panel.

Screen 26:

Select the Change button

You are back to the Shipment - Create Standard Shipment panel. Section 321 applies to the release of merchandise valued at under \$200. Change this shipment to the Section 321 Informal shipment release type.

Image: Selecting the Change button replaces the Shipment – Create Standard Shipment panel with Change Shipment Release Type panel.

Screen 27:

Select the Shipment release type combo box

Image: Change Shipment Release Type panel.

Screen 28:

Select the Sec 321 Informal item from the drop-down menu.

Image: Change Shipment Release Type; drop-down menu.

Screen 29:

Select the Continue button

Select the continue button and you will change your release type to Section 321. Look at the shipment and commodity screens.

Image: Selecting the Continue button replaces the Change Shipment Release Type panel with the Shipment – Create Standard Shipment panel.

Screen 30:

Scroll down

By selecting Section 321 Informal as your shipment type, you have changed your required fields on the Commodity screen. Navigate to the Commodity screen.

Image: Shipment – Create Standard Shipment panel.

Screen 31:

Select the Add Commodity link

Image: Selecting the Add Commodity link replaces the Shipment – Create Standard Shipment; Commodity panel with the Shipment – Edit Standard Section 321 Commodity panel.

Screen 32:

Section 321 applies to the release of merchandise valued at under \$200. If you designate your shipment type as Section 321, you will need to enter the value of the shipment. Country of origin is also required.

Be careful to only use Section 321 for commodities that qualify this process.

Now, we will change the shipment release type to Pre-filed In-bond.

Image: Shipment - Edit Standard Section 321 Commodity panel.

Screen 33:

Select the Change button

The ACE portal supports three In-bond types: Immediate Transportation (IT), Transportation and Exportation (T&E), and Immediate Exportation (IE).

If you designate a Master Bill as In-bond, the shipment type for the associated house bills will be left at their original release type setting.

You are back to the Shipment - Create Standard Shipment panel. Now look at Pre-filed In-Bond shipments.

Image: Selecting the Change button replaces the Shipment – Create Standard Shipment panel with the Change Shipment Release Type panel.

Screen 34:

Select the Shipment release type combo box

Image: Change Shipment Release Type panel.

Screen 35:

Select the Pre-filed Inbond item from the drop-down menu.

Image: Change Shipment Release Type; drop-down menu.

Screen 36:

Select the Continue button

By selecting the Continue button, you will change your release type to Pre-filed Inbond. Look at the Shipment and Commodity screens

Image: Selecting the Continue button will replace the Change Shipment Release Type panel with the Shipment – Create Standard Shipment panel.

Screen 37:

Scroll down

By selecting Pre-filed Inbond as your shipment type, you have changed your required fields on the Commodity screen and the Shipment screen.

Look at the new requirements.

Image: Shipment – Create Standard Shipment panel.

Screen 38:

Select the Add Commodity link

From here, you will first choose your relevant In-bond type. You will also need to enter an In-bond destination. If your In-bond type is IE or T&E, you will need to enter the foreign port of destination and the estimated date of U.S. departure. Mexican Pedimento Number is required for IE and T&E being exported to Mexico.

The In-bond information includes the following fields:

Rollover text #1:

Onward carrier:

Standard Carrier Alpha Code (SCAC) of carrier to whom in-bonds are being transferred, if applicable.

Rollover text #2:

Bonded carrier:

A code representing the identification (ID) number of the bonded carrier assuming liability for the in-bond movement. This is also referred to as the importer number or Internal Revenue Service (IRS) number. The IRS number of the onward carrier, if different from the importing carrier.

Rollover text #3:

In-bond #: Report a CBP In-bond number here. If left blank, the Shipment Control Number will be used as the In-bond number.

Rollover text #4:

Transfer carrier: The IRS number of a local cartman that will move the shipment within the port.

Image: Selecting the Add Commodity link replaces the Shipment – Create Standard Shipment panel with the Shipment – Edit Standard Inbond Commodity panel.

Screen 39:

In-bond shipments are required to include a dollar amount value in the Value field.

You will also need to include Harmonized Tariff Schedule (HTS) numbers for your commodity. A harmonized number can always be entered, however, it is only required when activating an in-bond that will be exported by ocean.

If you have supplied the additional data asked for by changing the shipment release type to "Pre filed In-bond", then, a QP/WP or CAFES declaration does not need to be made.

Note: Currently, a paper Customs Form 7512 is still required to be presented upon arrival at the first U. S. Port of Arrival  
You have reviewed some examples of the available shipment release types.

Image: Shipment – Edit Standard Inbond Commodity panel.

Screen 40:

To Summarize...

- You learned how to select the appropriate shipment type for your shipment.
- You viewed the varying information required for each shipment type.
- You identified the unique commodity information required based on shipment type.
- You know which shipment types can be split shipments.

Image: A clipboard and a Stack of boxes.

Screen 41:

Knowledge Check

What data element is not required on all shipment release types?

- A) Shipment Control Number
- B) Shipper
- C) Consignee

D) BRASS C-4 Code

Correct answer is D.

Screen 42:

Knowledge Check

If a carrier supplies the additional information required by the Pre-filed In-bond Shipment release type, does anyone else have to file an in-bond request using QP/WP or CAFES?

A) Yes

B) No

Correct answer is A.

Screen 43:

Knowledge Check

What data element is required for a BCS shipment?

A) Value

B) HTS Number

C) Entry Number

D) Country of Origin

Correct answer is C.

Screen 44:

Knowledge Check

Which of the following fields is required for a BRASS Shipment type?

- A) Value
- B) Common Carrier Commodity Code (C4)
- C) HTS Number
- D) Country of Origin

Correct answer is B.

Screen 45:

You have completed this lesson. In this lesson, you learned how to change the release type of a shipment.

For more information, see the following section of the Online Help in the ACE portal:

- Manifests: Shipments

Image: A purple rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the lower right hand corner of the rectangle.

## ***Lesson 9: Split Shipment***

Screen 1:

Lesson 9: Split Shipment demonstrates the process within the ACE Secure Data Portal for creating a shipment that has been split among two or more trips. A split shipment consists of merchandise that is delivered to and accepted by a carrier in the exporting country as one shipment under one bill of lading or waybill even though it is divided by the carrier into different parts which arrive in the United States at different times, often days apart.

After completing Lesson 9: Split Shipment, you will be able to:

- Identify the process for splitting a shipment.
- Specify a Boarded Quantity.
- Report shipments that have been split between multiple trips.

Image: A white rectangle surrounding screen text. A computer monitor, displaying the ACE logo, is situated in the left hand side of the rectangle.

Screen 2:

Image: Six red rectangular boxes identifying the steps for creating a split shipment with the steps labeled: 1) Create 1<sup>st</sup> Manifest; 2) Specify Boarded Quantity; 3) Check/Submit 1<sup>st</sup> Manifest; 4) Create 2<sup>nd</sup> Manifest; 5) Specify Remaining Boarded Quantity, and 6) Check/Submit 2<sup>nd</sup> Manifest.

The Shipment Control Number (SCN) is the key piece of data necessary for linking the manifests.

Select each step to view more details:

A split-shipment must be either a Pre-Arrival Processing System (PAPS) or Border Cargo Selectivity (BCS) shipment type.

Rollover text #1:

This shipment requires two manifests to complete a split shipment. The first manifest details a unique trip number.

Rollover text #2:

A Boarded Quantity indicates the shipment quantity that was loaded on the first trip. The manifest is saved but not submitted.

Rollover text #3:

The first manifest is checked for errors and submitted when complete.

Rollover text #4:

The second manifest is created with the same SCN as the first manifest; however, the trip number is unique.

Rollover text #5:

The remaining quantity is included on the second manifest.

Rollover text #6:

The second manifest is checked for errors and submitted when complete.

Screen 3:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). WFT, Inc. is transporting a shipment of paper from Canada. The original manifest was transmitted for a single trip. At the time of loading, this shipment of paper could not be loaded on one truck. You create a split shipment, and place the shipment of paper on two separate trucks.

Image: Photograph of Diane Sanchez and a business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 4:

Select the [XXXT06032009S1](#) link

For this exercise, we will skip ahead a little. You have already logged into the ACE portal and selected the Manifest tool. We have also already selected Truck AMS Test Carrier and filled out the other components on the manifest except for the shipment information.

To review how to navigate and fill out the previous manifest components, please review Lesson 3: Creating a Manifest.

Image: Selecting the XXXT06032009S1 link replaces the Manifest panel with the Manifest – View Standard Manifest panel.

Screen 5:

Select the Edit button

Image: Selecting the Edit button replaces the Manifest – View Standard Manifest panel with the Manifest – Edit Standard Manifest panel.

Screen 6:

Scroll down

Image: Manifest – Edit Standard Manifest panel.

Screen 7:

Select the Create Shipment link

We will now add shipment information.

Image: Selecting the Create Shipment link will replace the Manifest – Edit Standard Manifest panel with the Shipment – Create Standard Shipment panel.

Screen 8:

Select the Shipment control # text box

The Shipment - Create Standard Shipment panel is displayed. Make note of the shipment control number you enter. This is the number that will link your split shipment.

Image: Shipment – Create Standard Shipment panel.

Screen 9:

Select the Port/ Point of loading combo box drop-down menu.

Image: Shipment – Create Standard Shipment panel.

Screen 10:

Select the Schedule K item from the Port/ Point of Loading drop-down menu.

Image: Shipment – Create Standard Shipment panel.

Screen 11:

Select the Port/ Point of loading text box

Image: Shipment – Create Standard Shipment panel.

Screen 12:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 13:

To Create 1-Time Shipper, fill in the fields below.

Select the Name text box

Image: Shipment – Create Standard Shipment panel.

Screen 14:

Select the Address line 1 text box.

Image: Shipment – Create Standard Shipment panel.

Screen 15:

Select the City text box

Image: Shipment – Create Standard Shipment panel.

Screen 16:

Select the Country combo box drop-down menu.

Image: Shipment – Create Standard Shipment panel.

Screen 17:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 18:

Select the Canada item

Image: Shipment – Create Standard Shipment panel.

Screen 19:

Select the State/Province combo box

Image: Shipment – Create Standard Shipment panel.

Screen 20:

Select the Ontario item

Image: Shipment – Create Standard Shipment panel.

Screen 21:

Select the Zip/Postal code text box

Image: Shipment – Create Standard Shipment panel.

Screen 22:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 23:

To Create 1-Time Consignee, fill in the fields below.

Select the Name text box

Image: Shipment – Create Standard Shipment panel.

Screen 24:

Select the Address line 1 text box

Image: Shipment – Create Standard Shipment panel.

Screen 25:

Select the City text box

Image: Shipment – Create Standard Shipment panel.

Screen 26:

Select the Country combo box drop-down menu.

Image: Shipment – Create Standard Shipment panel.

Screen 27:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 28:

Select the USA item

Image: Saved Consignee; Country drop-down menu

Screen 29:

Select the State/Province combo box drop-down menu.

Image: Shipment – Create Standard Shipment panel.

Screen 30:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 31:

Select the New York item

Image: Shipment – Create Standard Shipment panel.

Screen 32:

Select the Zip/Postal code text box

Image: Shipment – Create Standard Shipment panel.

Screen 33:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 34:

Select the Select Equipment by combo box

Before you can add your commodity, you will need to select the equipment that will transport it.

Image: Shipment – Create Standard Shipment panel.

Screen 35:

Select the trip item from the drop-down menu.

Image: Shipment – Create Standard Shipment panel.

Screen 36:

Select the Add button

Image: Selecting the Add button replaces the Select Equipment by: panel with the Manifest – Select Trip Equipment panel.

Screen 37:

Select the radio button to select the Equip #/ Plate # of the Equipment.

Image: Manifest – Select Trip Equipment panel.

Screen 38:

Select the Continue button

Image: Selecting the Continue button replaces the Manifest – Select Trip Equipment panel with the Manifest – Edit One-time Equipment panel.

Screen 39:

Select the Continue button

Verify all information is correct before continuing

Image: Selecting the Continue button replaces the Manifest – Edit One-time Equipment panel with the Shipment – Create Standard Shipment panel.

Screen 40:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 41:

Select the Add Commodity link

Image: Selecting the Add Commodity link will replace the Shipment – Create Standard Shipment; Commodity panel with the Manifest – Edit Standard Shipment Commodity panel.

Screen 42:

Select the Shipment Quantity text box

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 43:

Select the Shipment Quantity combo box drop-down menu.

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 44:

Select the Roll item from the drop-down menu.

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 45:

Select the Weight text box

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 46:

Select the Weight combo box

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 47:

Select the Pounds item from the drop-down menu

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 48:

Select the Description text box

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 49:

Scroll down

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 50:

Select the Continue button

Image: Selecting the Continue button replaces the Manifest – Edit Standard Shipment panel with the Shipment – Create Standard Shipment panel.

Screen 51:

Scroll down

Image: Shipment – Create Standard Shipment panel.

Screen 52:

Select the Boarded quantity text box

Image: Shipment – Create Standard Shipment panel.

Screen 53:

Select the Continue button

Image: Selecting the Continue button replaces the Shipment – Create Standard Shipment panel with the Manifest – Edit Standard Manifest panel.

Screen 54:

Scroll down

Image: Manifest – Edit Standard Manifest panel.

Screen 55:

Select the Check for Errors button

Image: Selecting the Check for Errors button replaces the Manifest – Edit Standard Manifest panel with the Manifest – Review Standard Manifest panel.

Screen 56:

Scroll down

The ACE portal has completed its validation of your manifest. If there were any errors, you would have received a red error message at the top of the panel.

Image: Manifest – Review Standard Manifest panel.

Screen 57:

Select the Send to Customs button

Image: Selecting the Send to Customs button replaces the Manifest – Review Standard Manifest panel with the Manifest – Standard Manifest Submitted to Customs Successfully panel.

Screen 58:

Select the Ok button

You have successfully submitted your manifest.

You can now print your manifest cover sheet.

It is required that your driver carry a printed copy of your e-Manifest cover sheet when crossing the border.

We will skip the print step in this simulation.

Image: Selecting the OK button replaces the Manifest – Standard Manifest Submitted to Customs Successfully panel with the Manifest panel.

Screen 59:

Select the XXXT06032009S2 link

To add the second half of your split shipment, you must create a new manifest and shipment.

In this simulation, we have already created the second manifest, so we will select it now and add the second half of the shipment to it

Image: Manifest panel

Screen 60:

Select the Edit button

Image: Selecting the Edit button replaces the Manifest – View Standard Manifest panel with the Manifest – Edit Standard Manifest panel.

Screen 61:

Scroll down

Image: Manifest – Edit Standard Manifest panel.

Screen 62:

Select the Create Shipment link

At this point the manifest already exists. To review how to create a new manifest, please review Lesson 3: Creating a Manifest.

To add the second half of your split shipment, you will need to create a new shipment.

Image: Selecting the Create Shipment link replaces the Manifest – Edit Standard Manifest with the Shipment – Create Standard Shipment panel.

Screen 63:

Select the Shipment control # text box

The Shipment Control Number for the second half of the split shipment must match the SCN of the first half.

Image: Shipment – Create Standard Shipment panel.

Screen 64:

Scroll down

You do not have to add any of the other Shipping, Shipper, or Consignee information, since this was all listed on the first shipment.

Image: Shipment – Create Standard Shipment panel.

Screen 65:

Select the Boarded quantity text box

The only other Shipment field you need to fill out is the Boarded quantity. The Total shipment quantity will reflect zero and does not report the balance of pieces available. You need to ensure that you do not exceed the total shipment quantity reported in the first shipment.

Image: Shipment – Create Standard Shipment panel.

Screen 66:

Select the Continue button

Image: Selecting the Continue button will replace the Commodity panel with the Manifest – Edit Standard Manifest panel.

Screen 67:

Scroll down

Image: Manifest – Edit Standard Manifest panel.

Screen 68:

Select the Check For Errors button

Image: Selecting the Check for Errors button will replace the Manifest – Edit Standard Shipments panel with the Manifest – Review Standard Manifest panel.

Screen 69:

Scroll down

The ACE portal has completed its validation of your manifest. If there were any errors, you would have received an error message.

Image: Manifest – Review Standard Manifest panel.

Screen 70:

Select the Send to Customs button

Image: Selecting the Send to Customs button will replace the Shipment(s) panel with the Manifest – Standard Manifest Submitted to Customs Successfully panel.

Screen 71:

Select the Ok button

You have now successfully submitted both parts of your split shipment to CBP.

Image: Selecting the OK button will replace the Manifest – Standard Manifest Submitted to Customs Successfully panel with the Manifest panel.

Screen 72:

You are returned to the Manifest panel. From here, you are able to create a new manifest which you may need to do if your shipment is split across more than two trips.

Image: Manifest panel

Screen 73:

To Summarize...

- You created a split shipment by using the Boarded Quantity field in the Shipment section of a manifest to enter part of a shipment.
- You created a second manifest, with a unique Trip Number but the same Shipment Control Number.
- You entered the remaining part of the shipment in the second manifest.

Image: A clipboard and a Stack of boxes.

Screen 74:

Knowledge Check

Who splits a shipment?

- A) Importer
- B) Carrier
- C) Broker

D) CBP Officer

Correct answer is B.

Screen 75:

Knowledge Check

You are sending 10,000 rolls of paper through the port of Buffalo. However, the driver is only able to transport 6000 rolls. Which of the below statements best completes the remainder of the shipment?

A) Shipment Quantity = 6000

B) Boarded Quantity = 4000

C) Shipment Quantity = 4000

D) Boarded Quantity = 10,000

Correct answer is B.

Screen 76:

Knowledge Check

What number matches the various parts of the split shipment in ACE?

A) BCN

B) SCN

C) Sequence ID Number D) Shipper ID Number

Correct answer is B.

Screen 77:

Knowledge Check

If you have a split shipment, which of the following statements would be correct?

- A) Each shipment must have a unique Trip Number and begin with the same SCAC Code.
- B) Each shipment must have the same Trip Number and begin with the same SCAC Code.
- C) Each shipment must have a unique Trip Number and begin with the same Port Code.
- D) Each shipment must have the same Trip Number and begin with the same Port Code.

Correct answer is A.

Screen 78:

You have completed this lesson. In this lesson, you learned how to link a split shipment and a trip to complete the manifest.

For more information, see the following section of the Online Help in the ACE portal:

- Manifest: Shipments: Editing Standard Shipments.

Image: A purple rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the lower right-hand of the rectangle.

## **Lesson 10: Amend Manifest**

Screen 1:

Lesson 10: Amend Manifest demonstrates the process of locating a submitted manifest and editing it for re-submission to CBP. Manifests can be edited both prior to and after submission to CBP. For those manifests edited prior to submission, the user can either Save and Finish Later or Check for Errors and then Submit to CBP.

For manifests that have already been submitted to CBP, the user must supply an amendment code and re-submit the manifest to CBP. When you amend a submitted manifest prior to arrival, the one-hour clock restarts.

After completing Lesson 10: Amend Manifest, you will be able to:

- Locate a submitted manifest.
- Edit a submitted manifest and provide an amendment code.

Image: White rectangle surrounding screen text. A computer monitor, displaying the ACE logo, is situated in the lower left-hand corner of the rectangle. The second paragraph has blue hyperlink (amendment code) which when rolled over provides the standard amendment codes for both Standard Manifest and a Standard Manifest/Inbond

Rollover Text #1:  
Standard Manifest

01 Not laden abroad per evidence from foreign shipper, or amended pro-bill.

02 Error in manifesting, not laden on this trip; laden on subsequent trip for transportation to United States per evidence in files.

03 Clerical error in manifesting per pro-bill in files.

05 Erroneously duplicated by another pro-bill on the same manifest.

06 Prematurely landed or over carried to another United States port where proper disposition was made per evidence in files.

07 Inadvertently delivered without CBP release. Goods will be redelivered intact or carrier will pay duty, taxes, and/or liquidated damages.

11 Overage omitted from manifest through clerical error.

Rollover text #2:

Standard Manifest/Inbond

04 Pilfered, stolen, or lost while in custody of the carrier, per signed statement of person in charge or his authorized agent, or log extract in files.

16 Error in quantity manifest at port of origin. MDR (Manifest Discrepancy Report) will be filed at origin to correct in-bond entry.

17 Merchandise removed from original container and restuffed as part of in-bond movement.

18 Electronic manifest delayed by communications failure.

19 Amendment to non-critical field or provision of additional data to manifest.

26 In-bond diversion. Reason documented and on file.

27 Short delivery.

28 Wrong delivery.

29 Merchandise damaged/destroyed destroyed during transport.

30 Inadvertently delivered without CBP authorization. Goods will be redelivered intact or carrier will pay duty, taxes, and/or liquidated damages In-bond.

Screen 2:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). You notice a clerical error in the weight of the shipment (commodity — wooden furniture) on a manifest already submitted to CBP. In order to update the manifest, you will amend the manifest and provide CBP with an amendment code indicating the reason for the change.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 3:

Select the Filing Status combo box

The manifest panel defaults to list trip numbers that have not yet been submitted to CBP. We will filter the list to show those that have a status of Completed.

Image: Manifest panel

Screen 4:

Select the Completed item from the drop-down menu.

Image: Manifest panel.

Screen 5:

Select the Filter Manifests button

You can narrow down your manifests further by typing any additional information about the trip that needs to be amended into the corresponding fields.

You do not have any additional information, so select Filter Manifests.

Image: Manifest panel

Screen 6:

Select the XXXT20090529 link

Your completed manifests are displayed.

You can access a trip by selecting the hyperlinked trip number

Image: Selecting the XXXT20090529 link replaces the Manifest panel With the Manifest – View Standard Manifest panel.

Screen 7:

Select the Edit button

You have entered the View mode for this trip number. Here, you can view all of the information you previously submitted. In order to edit, you must enter Edit mode.

Image: Selecting the Edit button replaces the Manifest – View Standard Manifest panel with the Manifest – Amend Submitted Manifest panel.

Screen 8:

Select the Reason combo box

Before you can make edits, you must enter a reason for the amendment

Image: Manifest – Amend Submitted Manifest panel.

Screen 9:

Select the Clerical error in manifesting item from the drop-down menu.

Image: Manifest – Amend Submitted Manifest panel.

Screen 10:

Select the Make Changes button

Now that you have selected a reason code, you are able to make changes to your manifest.

Image: Selecting the Make Changes button will replace the Manifest – Amend Submitted Manifest panel with the Manifest – Edit Standard Manifest panel.

Screen 11:

Scroll down

You have entered the Manifest - Edit Standard Manifest panel. Your error was in the shipment.

If you need to edit the Est. date of arrival at first port in the U.S., the Trip # or Shipment Control #, you must either Cancel Manifest & Shipment(s) or Cancel Manifest but Keep Shipment(s).

Image: Manifest – Edit Standard Manifest panel

Screen 12:

Select the XXXT20090602 link

The shipment is listed at the end of your manifest. You can select the hyperlinked shipment control number to view the shipment information.

Image: Manifest – Edit Standard Manifest panel.

Screen 13:

Select the Reason combo box drop-down menu.

To amend a shipment, you will need a second reason code.

Image: Shipment – Edit Standard Shipment panel.

Screen 14:

Select the Clerical error in manifesting item

Image: Shipment – Edit Standard Shipment panel.

Screen 15:

Scroll down

Image: Shipment – Edit Standard Shipment panel.

Screen 16:

Select the Golf bags link

The commodity is listed under the Commodity section. You can view commodity information by selecting the hyperlinked commodity description.

Image: Shipment – Edit Standard Shipment panel.

Screen 17:

Select the Weight text box

You can now edit your commodity information

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 18:

Scroll down

Image: Manifest – Edit Standard Shipment Commodity panel.

Screen 19:

Select the Continue button

You have edited the weight of your commodity

Image: Selecting the Continue button will replace the Manifest – Edit Standard Shipment Commodity panel with the Shipment – Edit Standard Shipment panel.

Screen 20:

Scroll down

Your shipment has been updated. You are ready to resubmit your manifest

Image: Shipment – Edit Standard Shipment panel.

Screen 21:

Select the Continue button

Image: Selecting the Continue button will replace the Shipment – Edit Standard Shipment panel with the Manifest – Edit Standard Manifest panel.

Screen 22:

Scroll down

You are returned to the Manifest - Edit Standard Manifest panel

Image: Manifest – Edit Standard Manifest panel.

Screen 23:

Select the Check for Errors button

You have made your changes. You must complete your updates during this session since you do not have the option to save and finish later. Therefore, you want to validate your data to send to CBP.

Image: Selecting the Check for Errors button will replace the Manifest – Edit Standard Manifest panel with the Manifest – Review Standard Manifest panel.

Screen 24:

Scroll down

Your data has been validated and there were no errors. You are ready to submit your manifest to CBP.

If there was an error, it would be noted in red at the top of the Manifest-Review Standard Manifest panel.

Image: Manifest – Review Standard Manifest panel.

Screen 25:

Select the Send to Customs button

Image: Selecting the Send to Customs button will replace the Manifest – Review Standard Manifest panel with the Manifest – Standard Manifest Submitted to Customs Successfully panel.

Screen 26:

Select the Ok button

CBP will now receive a copy of your edited e-Manifest, with an amendment code describing the reason this manifest has been

resubmitted. You are now able to print a copy of your manifest. We will skip printing and select Ok.

Image: Selecting the OK button will replace the Manifest – Standard Manifest Submitted to Customs Successfully panel with the Manifest panel.

Screen 27:

Select the Filing Status combo box

The amended manifest is no longer listed in the list showing 'Completed' manifests. The manifest you just submitted now has a 'Completed - Amended' filing status.

Image: Manifest panel.

Screen 28:

Select the Completed - Amended item from the Filing status dropdown menu

Image: Manifest panel.

Screen 29:

Select the Filter Manifests button

You can now filter only for those manifests that have been amended.

Image: Manifest panel.

Screen 30:

Your manifest is now found under the filtered 'Completed - Amended' results.

Image: Manifest panel

Screen 31:

To Summarize...

- You have located a submitted manifest using the 'Filing Status' manifest filters.
- You learned that for trip numbers that have already been submitted to CBP, you must supply an amendment code and then re-submit to CBP.
- You edited the already submitted manifest for re-submission to CBP.

Image: A clipboard with a stack of boxes.

Screen 32:

Knowledge Check

Which filter would you use to locate a manifest that needs to be amended?

- A) Amended
- B) Preliminary
- C) In Progress
- D) Completed

Correct answer is D.

Screen 33:

Knowledge Check

Indicate the best descriptor for the following statement: If you edit a manifest that has not been submitted to CBP, you must identify an amendment reason code.

- A) Always
- B) Never
- C) Frequently
- D) Seldom

Correct answer is B.

Screen 34:

Knowledge Check

Indicate the best descriptor for the following statement: If you amend a manifest that has been submitted to CBP, you must re-submit the manifest.

- A) Always
- B) Never
- C) Frequently
- D) Seldom

Correct answer is A.

Screen 35:

### Knowledge Check

A manifest was submitted to CBP - the driver, Bill Gordon, reviews the manifest and determines the weight was stated at 1000 when it should have been 10,000 pounds. If the amended manifest was submitted to CBP on Tuesday at 0930, what is the earliest time the crew could arrive to be in compliance with the Trade Act of 2002?

- A) The crew can arrive anytime since the manifest has already been received by CBP.
- B) 1000 on Tuesday
- C) 1030 on Tuesday
- D) 2130 on Tuesday

Correct answer is C.

### Screen 36:

You have completed this lesson. In this lesson, you learned how to amend a submitted manifest.

For more information, see the following section of the Online Help in the ACE portal:

- Carrier View: Manifest: Amending
- Submitted Manifests

Image: A purple rectangle surrounding screen text. A computer monitor, displaying the ACE logo, is situated in the lower right hand part of the rectangle.

## ***Lesson 11: Searching Manifest Status***

Screen 1:

Lesson 11: Searching Manifest Status illustrates two options on how to search the status of a manifest in the ACE Secure Data Portal.

After completing this lesson, you will be able to:

- Search for manifests by status.
- View notifications.
- Filter notifications.
- Delete notifications.

Image: A white rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the lower left hand part of the rectangle.

Screen 2:

Image: two icons labeled 'Manifest Search' and 'Notifications' with Rollover text superimposed on top of the individual icons.

The two features that let you search the status of a manifest are Manifest Search and Notifications.

Select each icon below to learn more.

Rollover text #1:

Manifest Search:

Lets you search using trip or shipment information. For example, you would use this feature if you know the trip number and only want to see the current status of a particular trip. You may also search by conveyance, crew, equipment, or shipment control number. This shows you the current status only.

Rollover text #2:

Notifications:

Are electronic messages sent by CBP to give you the status history of a particular trip. For example, a notification will be sent when a trip is released. The Notifications panel also lets you search manifests by using a filter, which is helpful if you don't have the manifest details. You may also access a chronology of status messages here. To have access to notifications, you must select to receive them in Accounts Management.

Screen 3:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). WFT, Inc. sent out a shipment that is due to arrive at the port of Buffalo today. You would like to search the status of this trip to see if it has been released.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 4:

Select the Tools tab

There are two ways to search for the status of a manifest.

We will review the Manifest method first.

Image: ACE Secure Data Portal Tools tab

Screen 5:

Select the Manifest Tools link

Image: ACE Portal; Tools tab. The tools tab is divided into two panels: Task Selector and User Access. The Manifest Tools link is located in the Task Selector panel.

Screen 6:

Select the + next to CBP Incorporated

Image: ACE Portal Tools tab. Selecting the Manifest Tools link changed the Tools tab content. Four panels now display: Task Selector, Account Selector List, Manifest, and Shipment. CBP Incorporated is located in the Account Selector list panel in the Accounts section. The Accounts list has expanded to display four account hyperlinks:

- TRUCK AMS TEST CARRIER,
- CBP DUMMY SCAC OAAAR,
- ACE TEST RAIL CARRIER, and
- ACS OCEAN TEST CARRIER

Screen 7:

Select the TRUCK AMS TEST CARRIER link

Image: Account Selector List; Accounts panel.

Screen 8:

Scroll up

Image: Manifest panel.

Screen 9:

Select the Manifest - Search link

Image: ACE Secure Data Portal; Task Selector panel.

Screen 10:

Select the Category combo box drop-down menu.

Image: Search Manifests panel.

Screen 11:

Select Trip from the drop-down menu.

You can search using any one of the five options.

Image: Search Manifests panel.

Screen 12:

Select the Search button

Image: Selecting the Search button will replace the Search Manifests panel with the Search Manifests – By Trip panel.

Screen 13:

Select the Filing status combo box drop-down menu.

Image: Search Manifests – By Trip panel

Screen 14:

Select the Completed item from the drop-down menu.

Image: Search Manifests – By Trip panel.

Screen 15:

Select the Expected port of arrival text box

Image: Search Manifests – By Trip panel

Screen 16:

Select the Search button

Image: Search Manifests – By Trip panel.

Screen 17:

Select the XXXT1701451 link

Congratulations, you have found a manifest using the Manifest - Search tool.

To view detailed information related to a trip, select the specific Trip # shown in blue.

Image: Selecting the XXXT1701451 link will replace the Search Manifests – By Trip panel with the View Standard Manifest panel.

Screen 18:

Select the Ok button

Image: Selecting the OK button will replace the View Standard Manifest panel with the Search Manifests – By trip panel.

Screen 19:

Select the Accounts tab

Now try the other method of searching for manifest status, using the Carrier view.

Image: ACE Secure Data Portal; Accounts tab

Screen 20:

Select the View combo box

Image: ACE Secure Data Portal; Task Selector panel.

Screen 21:

Select the Carrier item from the drop-down menu.

Image: ACE Secure Data Portal; Task Selector panel.

Screen 22:

Select the GO button

Image: ACE Secure Data Portal; Task Selector panel.

Screen 23:

Select the + next to CBP Incorporated

Image: Account Selector List; Accounts panel.

Screen 24:

Select the TRUCK AMS TEST CARRIER link

Image: Account Selector List; Accounts panel.

Screen 25:

Scroll up

Image: ACE Secure Data Portal, Carrier panel.

Screen 26:

Select the Transactions link

At this time, only the Trade Account Owner has access to the  
Transactions task

Image: Task Selector; Transactions

Screen 27:

Scroll down

You can filter notifications by:

- Trip #
- Event
- Trip Component
- Date start and/or Date end

Image: ACE Secure Data Portal; Transaction Notifications panel.

Screen 28:

Select the Select All check box

Once you have filtered your transactions, you can delete older notifications. Select the check box next to each Trip # and then select the Delete Selected button.

Image: ACE Secure Data Portal; Transaction Notifications panel. The Transaction Notifications panel has check boxes for selecting manifests.

Screen 29:

Select the Delete Selected button

Note that the Select All check box will only select transactions that are currently visible in the window. If you have several pages of transactions, delete each page separately.

Image: Transaction Notifications panel

Screen 30:

Congratulations, you have searched for notifications of a manifest using the Carrier view. You have also filtered the notifications and deleted old notifications.

Image: Transaction Notifications panel

Screen 31:

Summarize...

- You searched for the status of a manifest using two different methods:
- You viewed a manifest using the Manifest - Search tool.
- You searched for notifications using the Transactions task in the Accounts tab.
- You deleted some of the notifications using the Delete Selected button.

Image: A clipboard and a stack of boxes.

Screen 32:

Knowledge Check

Which pair are the correct ways to find the status of a manifest?

- A) Ship Number and Trip Number
- B) Trip Filter and Find Data
- C) License Plate and Date of Submission
- D) Notifications and Manifest Search

Correct answer is D.

Screen 33:

Knowledge Check

Which two views are used to search for the status on a trip?

- A) Broker and Carrier
- B) Transactions and Manifest
- C) Carriers and Transactions
- D) Carrier and Manifest

Correct answer is D.

Screen 34:

Knowledge Check

What action must you take to receive Notifications?

- A) No action is required.
- B) Make a selection upon initial login on the Account tab.
- C) Send a message via the Significant Activity Log (SAL) to CBP.
- D) Select Notifications in Resources.

Correct answer is B.

Screen 35:

Knowledge Check

Where can you delete Notifications from your View?

- A) Transaction View
- B) Search Manifest Panel
- C) Transaction Notifications Panel
- D) You can not delete Notifications from your View.

Correct answer is C.

Screen 36:

You have completed this lesson. In this lesson, you learned how to search for manifest status, view notifications, filter notifications, and delete notifications.

For more information, see the following section of the Online Help in the ACE portal:

- Search for manifests by status.
- View notifications.
- Filter notifications.
- Delete notifications.

Image: A purple rectangle surrounding screen text. A computer monitor, displaying the ACE logo, is situated in the lower right hand side of the rectangle.

## **Lesson 12: In-Bond Arrivals**

Screen 1:

Lesson 12: In-bond Arrivals, illustrates the process of searching, viewing, and arriving In- bond shipments in the ACE Secure Data Portal.

After completing this lesson, you will be able to:

- Search in-bond shipments pending arrival.
- View in-bond shipments pending arrival.
- Report the arrival of in-bond shipments.

Image: A white rectangle surrounding screen text. A computer monitor, displaying the ACE logo, is situated in the lower left hand side of the rectangle.

Screen 2:

Image: Three red rectangles labeled 1) Search, 2) View and 3) Report. The flowchart displays the main in-bond shipment features available for carriers and their designated agents in the ACE portal.

The ACE portal provides a list of all In-bond shipments which have been submitted to CBP through an e-Manifest and that are due to arrive at a specific port.

Below are the main In-bond shipment features available for carriers and their designated agents in the ACE portal. The three in-bond shipment features are labeled as Search; View, and Report.

Select an In-bond shipment feature to learn more.

Rollover text #1:

You can search and/or filter a list of all In-bond shipments that are due to arrive at a specific port. You can also search by filing date, equipment number, In-bond number, or Shipment Control Number (SCN).

Rollover text #2:

View

You can view a list of all In-bond shipments that are due to arrive at a specific port. You can also arrive an In-bond while viewing the list.

Rollover text #3:

Report

Once you have searched and viewed In-bond shipments, you can report the arrival of the In-bond shipment via the ACE portal.

Screen 3:

Scenario

You are Diane Sanchez, a dispatcher for World Freight Trucking, Incorporated (WFT, Inc.). WFT, Inc. is shipping paper from Canada through the port of Buffalo and on to Seattle. The truck has just reached Seattle and you want to arrive the In-bond shipment.

Image: A truck processing port

Rollover Image:

The words "Diane Sanchez" - Photograph of Diane Sanchez with a copy of her business card identifying her as Dispatcher for World Freight Trucking Incorporated.

Screen 4:

Select the In Bond Arrival link

You are in the Manifest tool. From here, you can arrive In-bonds from the In Bond Arrival task.

Image: Selecting the In Bond Arrival link replaces the Task Selector panel with the In bonds Due to Arrive panel.

Screen 5:

Select the Find In-bonds Where combo box drop-down menu.

In the In-bonds Due to Arrive panel you can search for a particular In-bond shipment by equipment number, In-bond number, or shipment control number.

You know the equipment number for the equipment carrying the shipment, so you are able to search by this number.

Image: In-bonds Due to Arrive panel

Screen 6:

Select the Equipment Number item from the drop-down menu

Image: In-bonds Due to Arrive panel.

Screen 7:

Select the **IS** text box

Image: In-bonds Due to Arrive panel

Screen 8:

Select the Search button

The equipment number is entered. You are ready to search for the In-bond.

Image: In-bonds Due to Arrive panel

Screen 9:

Select the check box

The In-bond associated with the equipment number you entered is displayed. You need to enter the In-bond's arrival date in the Arrival Date text box, then enter the arrival port in the Arrival Port text box, and finally select the Arrive Selected In-bond(s) button.

Image: In-bonds Due to Arrive panel

Screen 10:

Select the Arrival Date (MM/DD/YYYY) text box

Image: In-bonds Due to Arrive panel

Screen 11:

Select the Arrival Time (24 HH:MM) text box

Image: In-bonds Due to Arrive panel

Screen 12:

Select the Arrival Port text box

Image: In-bonds Due to Arrive panel

Screen 13:

Select the Arrive Selected In-bond(s) button

You are ready to arrive your in-bond!

Image: In-bonds Due to Arrive panel

Screen 14:

The In-bond displays in the list. You have successfully arrived your In-bond.

After you select the Arrive Selected In-bond(s) button, In-bond shipments will disappear.

Image: In-bonds Due to Arrive panel

Screen 15:

To Summarize...

- You searched for an in-bond shipment using the equipment number.
- You then viewed the in-bond shipments that have not yet been arrived.
- You reported the arrival of the in-bond shipment by providing the date and port of arrival.

Image: A clipboard with a stack of boxes.

Screen 16:

Knowledge Check

Which of the following is a way to search for an in-bond shipment?

- A) Date of Submission
- B) Shipment Control Number
- C) Trip Filter
- D) First Expected Port of Arrival

Correct answer is B.

Screen 17:

Knowledge Check

What information is required to arrive the in-bond?

- A) Arrival Date and Arrival Port
- B) Shipment Control Number

C) Bill Control Number

D) Entry Number and IR Number

Correct answer is A.

Screen 18:

You have completed this lesson. In this lesson, you learned how to search in-bond shipments to arrive, view in-bond shipments to arrive, and report the arrival of in-bond shipments.

For more information, see the following section of the Online Help in the ACE portal:

- Looking up In-bonds due To Arrive

Image: A purple rectangle surrounds the screen text. A computer monitor, displaying the ACE logo, is situated in the lower right hand corner of the rectangle.

## ***Lesson 13: Reporting***

Screen 1:

Lesson 13: Reporting, illustrates how you can search, view, and generate pre-defined reports. You have the ability to analyze account information within the ACE Secure Data Portal, save the information, and print or export the reports. The Periodic Payments (Release 3) web based training course is prerequisite training for using reports in the ACE portal.

After completing this lesson, you will be able to:

- Search reports.
- Generate reports.
- Save reports.
- Print and export reports.

Image: A white rectangle surrounding the screen text. A computer monitor, displaying the ACE logo, is situated in the left hand side of the rectangle.

Screen 2:

In Periodic Payment (Release 3), the reports capability was limited to importers and brokers. e-Manifest: Trucks (Release 4) extends the functionalities of reports to include carriers. There are a number of pre-defined reports from which to choose. You can access a set of reports to evaluate and identify compliance issues and risks.

Select each category below to see more details about the types of reports available to carriers.

Let's go into the ACE portal.

Rollover text #1:

Border Release Advanced Selectivity System (BRASS) Reports:

- TR-018 – Products Report
- TR-019 – Commodity Code Report
- TR-022 – BRASS – Entry Number Bank Status Report

Rollover text #2:

Carrier Activity Reports:

- TR-001 – Crossings by Carrier
- TR-002 - Crossing by Driver Report
- TR-003 – Crossings by Conveyance
- TR-006 – Carrier Activity Report
- TR-020 – Carrier-Truck-Driver Report
- TR-029 – Empty Trips Report
- TR-036 – Crossings by Equipment Report

Rollover text #3:

Compliance Reports

- TR-007 – Split Shipment Interval Compliance Report
- TR-008 – Preferred Filing Interval Compliance Report
- TR-009 – Standard Filing Interval Compliance Report
- TR-011 – Unresolved Shipment Control Number Report
- TR-030 – Release Count Report
- TR-031 – Time Range Driven Release Count Report
- TR-033 – Exam Type Count Report
- TR-034 – Time Range Driven Exam Type Count Report

Rollover text #4:

In-Bond Reports:

- TR-010 – Inbond Shipment Status Report
- TR-013 – Unresolved Inbond Shipment Report
- TR-027 – Inbond Types by Port Report

Rollover text #5:

Transaction Detail Reports:

- TR-004 – Transactions View Report
- TR-005 – Shipment Type Report
- TR-015 – Transaction Party Report

Image: Yellow oblongs displaying the reports available under e-Manifest: Trucks (Release 4). Report categories are BRASS; Carrier Activity; Compliance; In-Bond, and Transaction Detail.

Screen 3:

Select the Accounts tab

Image: ACE Secure Data Portal; Accounts tab

Screen 4:

Select the Reports link

You have logged in to the ACE portal as a carrier and selected the Accounts tab.

In order to view pre-defined reports, you will need to select the Reports task and launch the reporting application.

Image: ACE Secure Data Portal - Task Selector; Select Task, Reports

Screen 5:

Select the Launch Tool button

Image: Launch Reports and Quickview Tool

Screen 6:

Select the + next to Public Folders

A new window displays the Reports home page. You are looking for a Periodic Statement report so you will need to navigate to the Account Revenues folder.

Image: ACE Secure Data Portal – Reports home page

Screen 7:

Select the Account Revenue link

Image: ACE Secure Data Portal – Reports home page

Screen 8:

Select the AR-007 Periodic Statement Quickview - Broker link

The Account Revenue reports are displayed.

Image: ACE Secure Data Portal; Account Revenue Reports

Screen 9:

Select the Filer Code(s) or --ALL—link

When a report is run, you will be prompted for certain information. Some reports require prompts be filled in before the report may be generated. In others, such as this one, all the fields are optional, although narrowing the prompts and information to be filtered will greatly reduce the amount of time to generate the report.

Image: AR-007 Periodic Statement Quickview – Broker; Prompts

Screen 10:

Select the --ALL-- item

Image: AR-007 Periodic Statement Quickview – Broker; Prompts

Screen 11:

Select the << button

Image: AR-007 Periodic Statement Quickview – Broker; Prompts

Screen 12:

Select the Y05 | CBP BROKERAGE, ACE PORTAL TEST BROKER item

Image: AR-007 Periodic Statement Quickview – Broker; Prompts

Screen 13:

Select the >> button

Image: AR-007 Periodic Statement Quickview – Broker; Prompts

Screen 14:

Select the Run Query button

Image: AR-007 Periodic Statement Quickview – Broker; Prompts

Screen 15:

Scroll down

The report is displayed. Reports can be modified and analyzed using the tools on the screen.

We will now review the report before we save it.

Image: AR-007 Periodic Statement Quickview - Broker

Screen 16:

Select the Document menu

You can see that this report is broken into two tables. The top table shows an aggregate total duties, taxes, and fees for this time period, and the bottom table shows the information broken down by broker and individual monthly statement.

Now you are ready to save the report. Save options can be found in the Document menu.

Image: AR-007 Periodic Statement Quickview - Broker

Screen 17:

Select the Save As item

Image: AR-007 Periodic Statement Quickview - Broker

Screen 18:

Select the Refresh on open check box

The Save As window displays. Here, you can choose your report name and the location where you will save the report. If you want the report to show the most up-to-date data each time the report is opened, select the Refresh on open check box. If the check box is not selected, the report will continue to display the data from the last save

Image: AR-007 Periodic Statement Quickview - Broker

Screen 19:

Select the + next to My Folders

Image: AR-007 Periodic Statement Quickview - Broker

Screen 20:

Select the Favorites link

Image: AR-007 Periodic Statement Quickview - Broker

Screen 21:

Scroll down

Image: AR-007 Periodic Statement Quickview - Broker

Screen 22:

Select the OK button

When you are finished making your selections, you can save them by selecting OK.

Image: AR-007 Periodic Statement Quickview - Broker

Screen 23:

Select the Document menu

Now that you have learned how to save a report, we will see how you can save an electronic copy of it in Microsoft Excel format. To do that you will save the report to your computer.

Image: AR-007 Periodic Statement Quickview - Broker

Screen 24:

Select the Save to my computer as sub-menu

Image: AR-007 Periodic Statement Quickview - Broker

Screen 25:

Select the Excel item

Image: AR-007 Periodic Statement Quickview - Broker

Screen 26:

Select the Save button

When the File Download dialog box appears, you can either save the report or open it to quickly view the data.

In this simulation, we will save the report first.

Image: File Download box

Screen 27:

Open the Activity Reports folder

Image: Save As box

Screen 28:

Select the Save button

Image: Save As box

Screen 29:

Select the Open button

Now we will look at the report in Excel format.

Image: Download complete box

Screen 30:

Select the X button

The Microsoft Excel window opens, displaying the report.

You are ready to exit Excel

Image: Microsoft Excel - AR-007\_Periodic\_Statement\_Quickview\_  
\_Broker.xls

Screen 31:

Select the View menu

Now that you know how to save the report we will review how to print a report.

Reports cannot be printed in the interactive view we see here. To print the report, view it in Adobe Acrobat Portable Document Format (PDF) mode.

Image: AR-007 Periodic Statement Quickview – Broker

Screen 32:

Select the PDF mode item

Image: AR-007 Periodic Statement Quickview – Broker

Screen 33:

Select the Print icon

Image: AR-007 Periodic Statement Quickview – Broker

Screen 34:

Select the OK button

The Print dialog box displays. To print the report, select the OK button.

Image: Print dialog box

Screen 35:

Select the View in HTML format button

To return to the interactive view, select the View in HTML format button

Image: HTML Dialogue box

Screen 36:

Select the Home icon

Image: AR-007 Periodic Statement Quickview – Broker

Screen 37:

Select the Log Out icon

To exit the reports module, select the Log Out icon, which resembles a lock.

Image: ACE Secure Data Portal; Reports home page

Screen 38:

Congratulations! You now know how to save, print, and export reports.

Image: ACE Secure Data Portal; Accounts tab

Screen 39:

To Summarize...

- You searched for a report using the Navigation pane.
- You generated a report to view the details.
- You saved, printed, and exported the report to be able to use it in the future.

Image: A clipboard representing a Manifest and a stack of cartons representing a Shipment

Screen 40:

Knowledge Check

Which of the following correctly describes the purpose of the Reports feature in ACE?

- A) To improve compliance by reviewing and responding to specific compliance problems.
- B) To review and respond to risks and solutions agreed to by CBP and an Account Representative.
- C) To filter and display active manifests.
- D) To analyze account information within the ACE portal.

Correct answer is D.

Screen 41:

Knowledge Check

How do you save a report so that it will display the same data each time it is opened?

- A) Check the box next to Refresh on Open.
- B) Un-check the box next to Refresh on Open.
- C) Check the box next to Permanent Regional Formatting.
- D) Un-check the box next to Permanent Regional Formatting.

Correct answer is B.

Screen 42:

Knowledge Check

Which of the following is NOT a format available for exporting a report?

- A) Comma Separated Values (CSV) Text File
- B) Microsoft Excel
- C) Adobe Acrobat PDF
- D) Microsoft Word

Correct answer is D.

Screen 43:

You have completed this lesson. In this lesson, you learned how to view, save, and export a report.

For more information, see the following section of the Online Help in the ACE portal:

- Reports

Additional web-based Reports Training is available on <http://www.cbp.gov>

Select Exit to return to the Lesson Menu Submit

Image: A purple rectangle surrounding screen text. A computer monitor, displaying the ACE logo, is situated in the lower right hand corner of the rectangle.