

**WEB-BASED TRAINING GUIDE
FOR
Automated Commercial Environment (ACE) Initial Login
for Trade Account Owners**

Version 1.0

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Module 1: Course Navigation

Lesson 1: 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.

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons: Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

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.

Select Next to continue.

Image: A gavel lying on top of a document.

Buttons: Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

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.

Select Next to continue.

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

Buttons: Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

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.

Select Next to continue.

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

Navigation bar Options

Pause button, temporarily stops the slide.

Next button, moves to the next slide.

Back button moves to the previous slide.

Exit button, closes the lesson and returns to the Course Menu.

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

Buttons: Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

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.

Select Next to continue.

Buttons: Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

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.

Select Next to continue.

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

Buttons: Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

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.

Select Exit to return to the Menu.

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

Buttons: Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Module 2: ACE Initial Login for Trade Account Owners

Lesson 1: Retrieving the Temporary Password

Screen 1:

Lesson 1 Temporary Password

Lesson 1 demonstrates how to retrieve the temporary password needed for the initial login to the Automated Commercial Environment (ACE) secure data portal.

After completing this lesson, you will be able to:

- Retrieve your temporary password

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 2:

As the Trade Account Owner (TAO), you will receive two e-mails that contain information about your new ACE portal account.

You will need information from both of these e-mails in order to perform the initial login to the ACE portal.

One of the e-mails is from aceuserservice@cbp.dhs.gov and contains:

- Your Account ID or UserID;
- Link to your temporary password.

Tip: If you do not receive this first e-mail, look in your junk or spam folders. E-mail firewalls may forward incoming mail to these folders.

The other e-mail is from the account administrator who created your account. This e-mail:

- Notifies you of your account creation;
- May contain your shared secret; and
- Provides instructions for logging in to the ACE portal.

Select Next to continue.

Image: Green rectangles surrounding the text.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 3:

When you get access to the ACE portal, you will get an e-mail from aceuserservice@cbp.dhs.gov. Open the e-mail and select the enclosed link to retrieve your temporary password.

Text caption displays: Open the New Account Information e-mail

Image: Screenshot of a Microsoft Outlook Inbox with a message from aceuserice@cpb.dhs.gov.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 4:

Prior to selecting the Retrieve Password link, be sure to write down the Account ID that is provided in this e-mail. The ID will be used as your "Shared Secret" to access your temporary password. It will also be the ID you use to log into the ACE system.

The temporary password must be retrieved within 21 days from the time the e-mail was created or it will expire. If the password expires, you must contact the ACE Technology Support Center to have it reset.

Select the link on this e-mail to access the temporary password.

Text caption displays: Select the link.

Image: Screenshot of an opened message from aceuserservice@cbp.dhs.gov displaying and ACE Email Notification message. The message contains a Retrieve Password Page link.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 5:

Once you select the Retrieve Password link from your e-mail, ACE displays the Retrieve Password page and automatically enters an access number in the Transaction ID text box.

Your next step is to enter the shared secret you received in the e-mail from the account administrator. The shared secret is only needed to retrieve your temporary password.

If you did not receive this e-mail, contact the Technology Support Center available 24-hours a day, seven days a week at 1-866-530-4172.

Text caption displays: Select the Shared Secret field

Image: Retrieve Password Page containing Transaction ID and Shared Secret text fields as well as submit and cancel buttons.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 6:

Text Caption displays: Select the Submit button

Image: Retrieve Password Page containing Transaction ID and Shared Secret text fields as well as submit and cancel buttons. Transaction ID and Shared Secret text fields are filled with data.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 7:

The temporary password allows you to log in to the ACE secure data portal for the first time. Note that the temporary password is a completely random collection of Capital letters, lower-case letters, numbers, and special characters.

When you get the temporary password, make sure you record it. Once you select the Finished Viewing Password link, you will not be able to retrieve the password again.

Text caption displays: Select the Finished Viewing Password button

Image: Password Retrieval Page containing the following fields and associated data: Resource Name, Your Account ID, and Your password is. The page also contains a Finish viewing password button.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 8:

The Technology Support Center

For additional assistance, call the Technology Support Center 1-866-530-4172 and follow the prompts.

The Technology Support Center is available 24 hours a day and 7 days a week.

Select Next to continue.

Image: A woman working at a computer.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 9:

You have completed Lesson 1: Retrieving the Temporary Password

In this lesson, you learned how to retrieve your temporary password.

Select Exit to return to the Menu.

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

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Lesson 2: Creating Your ACE Password

Screen 1:

Lesson 2: Creating Your ACE Password

Lesson 2 demonstrates how to create a new password when logging into the Automated Commercial Environment (ACE) secure data portal for the first time.

After completing this lesson, you will be able to:

- Create your ACE password.
- Select security questions to aid in the event that you need to reset your password.

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 2:

To access the ACE secure data portal login page, you must open a Web Browser.

Text caption displays: Open the Internet Explorer Web Browser icon

Image: Computer Desktop with icons including Internet Explorer.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 3:

Once you open a Web Browser, type <https://ace.cbp.dhs.gov> in the Address line. Select the Go button in order to open the ACE login screen.

Text caption displays: Select the Go button

Image: The CBP.gov website as displayed in Internet Explorer. The top of the screen features an Address line with a Go button to its right.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 4:

Log into the ACE portal as a new account user to choose your challenge response questions and reset your password.

Text caption displays: Scroll down

Image: The top portion of the ACE secure data portal login page.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 5:

This is the ACE secure data portal login page. You are now ready to type your UserID. Select the UserID field to continue.

Text caption displays: Select the UserID field

Image: The ACE secure data portal login page with text fields for UserID and Password. Neither field currently contains text.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 6:

The next step is to type the temporary password you just retrieved.
Select the Password field to continue.

Text caption displays: Select the Password field

Image: The ACE secure data portal login page with text fields for UserID and Password. The User ID field contains text.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 7:

Text caption displays: Select the Login button.

Image: The ACE secure data portal login page with text fields for UserID and Password. The User ID and Password fields contain text.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 8:

The screen displayed here confirms you entered your UserID and temporary password correctly. The next step in the initial login process is to set five challenge response questions.

Select Next to continue.

Image: The ACE secure data portal – New User-Set Challenge Response Questions page

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 9:

At the Reset Password Challenge Questions page, you will need to select and answer five different challenge questions from the list of 14 questions.

To begin, select the first challenge question drop-down menu arrow in order to display a listing of options.

Note: As with passwords, answers to response questions are case sensitive. It is recommended that you use either all upper or lower case when typing in responses.

Text caption displays: Select the Question 1 drop-down menu

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 10:

These challenge questions are used to validate your identity should you need to reset your password.

For this demonstration, we are going to select "What is your birthplace?"

Text caption displays: Select what is your birth place? Item

Image: The ACE secure data portal – Reset Password-Challenge Questions page. The drop-down menu associated with question 1 is expanded with a list of several question options from which the user can make a selection.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 11:

Select the first Question 1 field and we will type a response to the first challenge question for you.

Text caption displays: Select the first Question 1 field

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 12:

Select the second Question 1 field for the first challenge question.

ACE requires each challenge question to be answered twice.

Text caption displays: Select the second Question 1 field

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question. The first text field associated with question 1 is filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 13:

Text caption displays: Select the Question 2 drop-down menu

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question. The text fields associated with question 1 are filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 14:

Text caption displays: Select what is your mother's maiden name?
Item

Image: The ACE secure data portal – Reset Password-Challenge Questions page. The drop-down menu associated with question 2 is expanded with a list of several question options from which the user can make a selection.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 15:

Text caption displays: Select the first Question 2 field

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question. The text fields associated with question 1 are filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen16:

We will answer the rest of the challenge questions for you.

Text caption displays: Select the second Question 2 field

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question. The text fields associated with question 1, and the first text field associated with question 2 are filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 17:

Once all of your questions have been answered, you may submit your answers. In case you forget your password in the future, ACE will prompt you to answer three of these questions, selected randomly, before resetting your password.

Text caption displays: Select the Submit Questions button

Image: The ACE secure data portal – Reset Password-Challenge Questions page. This page contains drop-down menus for five challenge questions and two corresponding text fields for answering each question. The text fields associated with all of the challenge questions are filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 18:

You are now prompted to choose a new password. First let's look at the Password Policy.

Text caption displays: Select the Password Policy link

Image: The ACE secure data portal – Reset Password page. This page includes instructions for resetting one's password, a link to the Password Policy, and text fields to allow users to change their passwords.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 19:

Take a few moments to read the password policy parameters before you select the Close button.

Note: When you change your password at some future date, you will not be able to reuse the last six passwords.

Text caption displays: Select the Close button

Image: The ACE secure data portal – ACE Password Policy page.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 20

Now that you have reviewed the password policy, you are ready to select the New Password field and type your new password.

Text caption: Select the New Password field

Image: The ACE secure data portal – Password reset page. This page includes two text fields: New Password and Retype New Password. Both fields are required. This page also includes Continue and Cancel buttons.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 21

Confirm your new password by typing it again.

Text caption displays: Select the Retype New Password field

Image: The ACE secure data portal – Password reset page. The New Password is filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 22

Text caption displays: Select the Continue button

Image: The ACE secure data portal – Password reset page. The New Password and Retype New Password fields are filled.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 23

To completely close the Web browser, answer yes to the prompt confirming you want to close.

Text caption displays: Select the Yes button

Image: Pop-up box asking if the user wants to close this window. Options include a Yes and No button.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 24

Closing the web browser may include other Internet windows you are separately working on and even your e-mail if it is intranet based like Microsoft Outlook web mail or Hotmail.

Now that you have selected the Yes button to close the Web Browser, make sure you close all other Web Browsers.

Select Next to continue.

Image: A computer desktop.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 25

The Technology Support Center

For additional assistance, call the Technology Support Center 1-866-530-4172 and follow the prompts.

The Technology Support Center is available 24 hours a day and 7 days a week.

Select Next to continue.

Image: A man working on a computer.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 26

You have completed Lesson 2: Creating Your ACE Password

In this lesson, you learned how to:

Create your ACE password.

Establish your challenge questions which will aid you in the event you need to reset your password.

Select Exit to return to the Menu.

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

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Lesson 3: Initial Login to the ACE Portal

Screen 1:

Lesson 3: Initial Login to the ACE Portal

Lesson 3 demonstrates how to log into and log out of the ACE secure data portal.

After completing this lesson, you will be able to:

- Log into the ACE secure data portal.
- Log out of the ACE secure data portal.

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 2

To log into the ACE portal, open a new Web browser.

Text caption displays: Open the Internet Explorer Browser icon to open a new Web browser

Image: A computer desktop.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 3

Type <https://ace.cbp.dhs.gov> in the Address line.

Text caption displays: Select the Go button

Image: The CBP.gov website as displayed in Internet Explorer. The top of the screen features an Address line with a Go button to its right.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 4

Text caption displays: Scroll down

Image: The top portion of the ACE secure data portal login page.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 5

This is the ACE secure data portal login page. You are now ready to select the UserID field and enter your UserID.

Select the UserID field and we will enter the UserID for you.

Text caption displays: Select the UserID field

Image: The ACE secure data portal login page with text fields for UserID and Password. Neither field currently contains text.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 6

The next login step to the ACE secure data portal is to select the Password field and enter your password.

Select the Password field and we will enter the password for you.

Text caption displays: Select the Password field

Image: The ACE secure data portal login page with text fields for UserID and Password. The User ID field contains text.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 7

Text caption displays: Select the Login button.

Image: The ACE secure data portal login page with text fields for UserID and Password. The User ID and Password fields contain text.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 8

This is the ACE secure data portal with the Home tab displayed.

Note: Navigating through the ACE secure data portal can only be done using the buttons, tabs, drop-downs, and icons located within the ACE secure data portal. You should not use the icons on your web browser toolbar, particularly the Back button. These can cause problems with your ACE session and may cause pages not to display or data to be lost.

Select Next to continue.

Image: ACE secure data portal with the Home tab displayed.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 9

To log off the ACE portal, select the Logoff icon located in the upper right-hand corner of the navigation bar. Scroll to the right in this demonstration.

Text caption displays: Scroll to the right

Image: ACE secure data portal with the Home tab displayed.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 10

Text caption displays: Select the Logoff icon to close the ACE portal

Image: ACE secure data portal with the Home tab displayed.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.
Select Exit to return to the course menu screen.

Screen 11

When you log off of the ACE Portal, you are returned to the login page.

Select next to continue.

Image: ACE secure data portal login page.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 12

The Technology Support Center

For additional assistance, call the Technology Support Center 1-866-530-4172 and follow the prompts.

The Technology Support Center is available 24 hours a day and 7 days a week.

Select Next to continue.

Image: A woman working at computer.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 13

You have completed Lesson 3: Initial Login to the ACE Portal

In this lesson, you learned how to log into and log out of the ACE secure data portal.

Select Exit to return to the Menu.

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

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Lesson 4 Setting Up Your Carrier Record

Screen 1:

Lesson 4: Setting Up Your Carrier Record

Lesson 4 demonstrates how to set up carrier records in the Automated Commercial Environment (ACE) secure data portal. Trade Account Owners are the highest level Trade role in the ACE secure data portal.

After completing this lesson, you will be able to:

- Set up a Carrier record.

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 2

In the first three lessons we learned how to retrieve your temporary password, set your challenge questions and your permanent password, and log into ACE for the first time. In this lesson, we will see how to set up your ACE account information.

If you log off of the ACE secure data portal before setting up your carrier's record, you can access ACE through your favorites or by typing <https://ace.cbp.dhs.gov> in your Web browser window.

Once you reach the ACE login page, select the UserID field and enter your UserID.

To continue, select the UserID field and we will type the UserID for you.

Text caption displays: Select the UserID field

Image: The ACE secure data portal login page with text fields for UserID and Password. Neither field currently contains text.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 3

Next, select the Password field and we will type the password for you.

Text capture appears: Select the Password field

Image: The ACE secure data portal login page with text fields for UserID and Password. The User ID field contains text.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 4

And now select the Login button.

Text caption displays: Select the Login button

Image: The ACE secure data portal login page with text fields for UserID and Password. The User ID and Password fields contain text.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 5

This is the home page for the ACE secure data portal.
ACE displays this screen whenever you login.

To view account information, go to the Accounts tab.

Text caption displays: Select the Accounts tab

Image: ACE secure data portal with the Home tab displayed.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 6

At the ACE portal Accounts page, Broker is the account type that is selected by default.

To change the account type to carrier, you must first select the View drop-down menu in the Select Account Type section of the Task Selector panel.

Text caption displays: Select the Account Type drop-down menu

Image: ACE secure data portal with the Accounts tab displayed.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 7

From the drop-down menu, select Carrier.

Text caption displays: Select Carrier

Image: ACE secure data portal with the Accounts tab displayed and the View drop-down menu expanded.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 8

Text caption displays: Select the GO button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 9

Review the listings of top accounts located in the Account Selector List portlet.

To expand a top account list to display both parent and subsidiaries, select the plus sign [+] adjacent to the top account on the lower left side of the screen.

Text caption appears: Select the [+] next to CBP Incorporated

Image: ACE secure data portal with the Accounts tab displayed. CBP Incorporated is the only account listed in the Account Selector List portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 10

Select the subsidiary company name to display a list of options.

Text caption displays: Select the carrier account name

Image: ACE secure data portal with the Accounts tab displayed. Data relating to the CBP Incorporated Top Account page is displayed in the View Top Account portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 11

You can now view the Carrier portlet for the selected carrier. The message at the top of the portlet, "No Contact Persons Found," prompts you to add the missing carrier information.

The next step is to enter the taxpayer ID information for the selected Carrier.

Select Next to continue.

Image: ACE secure data portal with the Accounts tab displayed containing the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 12

Enter the taxpayer ID by using one of the following two Taxpayer ID Type options:

1) USA: Social Security Number

2) USA: Employer ID Number

Note: If your carrier is a Canadian or Mexican company and does not have a US Taxpayer ID, select USA: Employer ID Number as the Taxpayer ID Type and type 99-9999999 as the Taxpayer ID #.

Then select the Organization Structure.

In this simulation we will skip adding this information. Select the Continue button to continue.

Text caption displays: Select the Continue button.

Image: ACE secure data portal with the Accounts tab displayed containing the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 13

Next, enter the address information for the selected carrier. All address text boxes with an asterisk are required. In this simulation we will add the address information for you. Select the Save button to continue.

Note: Although the State/Province text box and the Zip/Postal Codes text box do not have an asterisk next to them, you are still required to enter the information.

Text caption displays: Select the Save button

Image: ACE secure data portal with the Accounts tab displayed containing the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 14

When the required address information has been entered, ACE displays the "Address has been standardized" message in red at the top of the screen.

Note: If there is a problem with an address, ACE asks you if you want to use the address anyway. Check for errors before accepting the address.

Select Next to continue.

Image: ACE secure data portal with the Accounts tab displayed containing the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 15

The Technology Support Center

For additional assistance, call the Technology Support Center 1-866-530-4172 and follow the prompts.

The Technology Support Center is available 24 hours a day and 7 days a week.

Select Next to continue.

Image: A man working at computer.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 16

You have completed Lesson 4: Setting Up Your carrier Record

In this lesson, you learned how to set up a carrier record.

Select Exit to return to the Menu.

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

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Lesson 5 Adding a Company Contact

Screen 1:

Lesson 5: Adding a Company Contact

Lesson 5 demonstrates how to add a company contact in the Automated Commercial Environment (ACE) secure data portal.

After completing this lesson, you will be able to:

- Add a point of contact for a carrier.

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 2:

After entering the tax ID and organization structure, ACE prompts you to enter a point of contact for the newly created company. As the Trade Account Owner (TAO), you may be the point of contact for the company.

To begin, enter the point of contact name in the Last Name field and select the Search button.

Text caption displays: Select the Last Name field

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. The search criteria discussed are contained in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.
Select Exit to return to the course menu screen.

Screen 3

Text caption displays: Select the Search button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. The button mentioned is contained in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 4

If you are the TAO, your account information is already stored within the ACE program.

We will now go through the procedure for adding this existing contact information to your carrier's record as the point of contact.

Text caption displays: Select the Select and Continue button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Search results and two buttons (Select and continue, and Cancel) are contained in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.
Select Back to return to the previous screen.
Select Next to continue.
Select Exit to return to the course menu screen.

Screen 5

ACE now displays the information on file for the point of contact. You can review the information and answer the question, Is the Contact Address the same as the Person Address? You would select Yes if the address stored with the person is the address used as their contact information for this account.

For this demonstration, we will use the default selection, No, because there is no address stored with Diane Sanchez.

Text caption displays: Select the Continue button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Detailed information about the carrier's point of contact is displayed in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 6

You can use this screen to update addresses.

Text boxes with an asterisk (*) indicate the information is required.

We have filled in this information for you for this simulation. Once the information is complete, you can select Save.

Text caption displays: Select the Save button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Form fields associated with the carrier's point of contact are displayed in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 7

Once you select Save, ACE returns you to the Accounts task. If you are unable to view the bottom of the Carrier portlet, scroll down to confirm the ACE program has added your point of contact.

For this demonstration, view the highlighted point of contact information.

Select Next to continue.

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Detailed carrier information is displayed in the Carrier portlet, including tabs that contain information pertaining to carrier Contacts, Addresses, Drivers/Crew, Conveyances, Equipment, Shippers, and Consignees.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 8

Now we will demonstrate how to add a point of contact not already in the ACE program.

Note: If you have searched for a carrier contact and the name is not listed, select the Create button to add a new company contact to ACE.

Text caption displays: Select the Create button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. The Create button is contained in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 9

To begin, select the appropriate contact type from the drop-down menu and enter the contact information. We have entered the information for you in this simulation.

Once completed, select Save.

Text caption displays: Select the Save button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Form fields associated with the carrier's point of contact are displayed in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 10

The Carrier panel displays.

If you cannot see the bottom of the Carrier panel, scroll down to confirm that ACE has added the point of contact information.

Select Next to continue.

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Detailed carrier information is displayed in the Carrier portlet, including tabs that contain information pertaining to carrier Contacts, Addresses, Drivers/Crew, Conveyances, Equipment, Shippers, and Consignees. The new point of contact is listed in the Contacts tab.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 11

The Technology Support Center

For additional assistance, call the Technology Support Center 1-866-530-4172 and follow the prompts.

The Technology Support Center is available 24 hours a day and 7 days a week.

Select Next to continue.

Image: A woman working at computer

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 12

You have completed Lesson 5: Adding a Company Contact

In this lesson, you learned how to add a point of contact to your carrier record both by using an existing person in ACE and by adding a new person.

Select Exit to return to the Menu.

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

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Lesson 6 Editing Your Carrier Record

Screen 1

Lesson 6: Editing Your Carrier Record

Lesson 6 teaches you how to edit carrier records in the Automated Commercial Environment (ACE) secure data portal.

After completing this lesson, you will be able to:

- Edit you carrier record.
- Add Department of Transportation (DOT) number, cargo release notification method, and insurance to a carrier record.

Select Next to continue.

Image: Computer monitor displaying the ACE logo.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 2

For this demonstration, we have entered the carrier's Taxpayer ID number, organization structure, street address, and the points of contact.

The remaining required information for the carrier is:

- Department of Transportation number or DOT
- Cargo release notification
- Other company name
- Insurance if carrying hazardous materials

To edit information currently saved in ACE or to add information, select the Edit button.

Text caption displays: Select the Edit button

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. The Edit button is contained in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 3

The Carrier panel allows you to edit the carrier's information.

If applicable, you should ensure that DOT #, Cargo Release Notification, Other Company Name, and Insurance information are entered accurately. We have entered the DOT # and Cargo Release Notification data for you.

Note: If the company does not have a US DOT number, type the default 99999.

Text caption displays: Select the Save button.

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Form fields associated with the Carrier Information are displayed in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 4

We have simulated completing the DOT# and cargo release notification information.

Select Next to continue.

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Detailed Carrier information is displayed in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 5

You are now ready to use your Carrier portal account. Before you begin to create an e-Manifest, you should enter certain data to the Carrier screen. Entering Drivers/Crew, Conveyances, Equipment, Shippers, and Consignees can simplify the process of creating e-Manifests.

There are several hyperlinks for the Point of Contact name you just created. Select any of these hyperlinks to navigate to a screen where you can enter the data.

For specific instructions on how to set up these records in your portal account, please take the Web Based Training (WBT) - e-Manifest: Trucks R4.

Select Next to continue.

Image: ACE secure data portal with the Accounts tab displayed and the Carrier view selected. Detailed Carrier information is displayed in the Carrier portlet.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 6

The Technology Support Center

For additional assistance, call the Technology Support Center 1-866-530-4172 and follow the prompts.

The Technology Support Center is available 24 hours a day and 7 days a week.

Select Next to continue.

Image: A woman working at computer.

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.

Screen 7

You have completed Lesson 6: Editing Your Carrier Record

In this lesson, you learned how to add the following information to a carrier record:

- Department of Transportation (DOT) number.
- Cargo Release Notification.
- Insurance data.

Select Exit to return to the Menu.

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

Buttons:

Select Pause to temporarily stop the course.

Select Back to return to the previous screen.

Select Next to continue.

Select Exit to return to the course menu screen.