



ACE Truck e-Manifest - Trade

Create a Manifest

August 2020



U.S. Customs and
Border Protection





DEVELOPMENT NOTICE

Development for the new ACE Truck e-Manifest System is ongoing; this document reflects functionality as of August 2020.

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TOPIC 1: INTRODUCTION

The new ACE Truck e-Manifest web-based application for the Trade allows carriers to submit electronic truck manifests (formerly trips) and bills of lading (formerly shipments) to U.S. Customs and Border Protection (CBP) prior to a truck's arrival at a United States land border crossing.

One of the main processing functions included in the **Truck Manifest Trade Portal** application is creating a manifest and bill of lading for truck trade users. The create function includes a new wizard feature that guides the user through a series of well-defined steps, entering data in each step and proceeding to the next step until completion.

This Quick Reference Guide (QRG) covers the process to create a manifest.

The steps included in the **Create Manifest** process are:

- **Step 1 Header**
- **Step 2 Crew**
- **Step 3 Vehicles**
- **Step 4 Bill of Lading**
- **Step 5 Review**
- **Step 6 Save as Draft or Submit Manifest**

To start the **Create Manifest** process, select the **Create** button on a main tab of the application to display the **Create** drop-down menu and select the **Manifest** option. This displays the **Create Manifest** landing page.

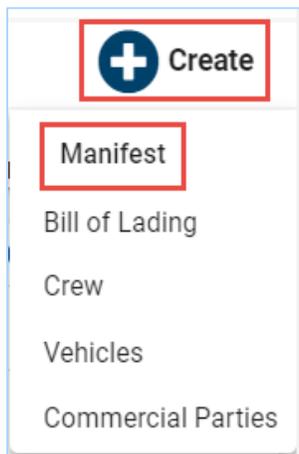


Figure 1: Create Menu – Manifest Option



NOTE: Reference the **Access and Navigate the Truck Manifest Trade Portal QRG** for more information about login and the four main tabs.



Create Manifest Prepared by: ZZZZ Status:

1 Header **2** Crew **3** Vehicles **4** Bill of Lading Review

Header

Carrier * ZZZZ - SCAC Code ZZZZ Spring	Manifest Number * ZZZZ	Estimated Date of Arrival * MM/DD/YYYY
Estimated Time of Arrival * Local Arrival Port Time HH:MM Military	Estimated Port of Arrival *	Is this an in-transit manifest? * <input type="radio"/> Yes <input checked="" type="radio"/> No

Figure 2: Create Manifest Landing Page – Steps in Create Manifest Process



TOPIC 2: STEP 1 HEADER

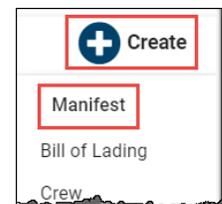
INTRODUCTION

The **Create Manifest** landing page defaults to the **Step 1 Header** section. The **Header** section allows entering header information for the manifest. Fields that are required are marked with an asterisk (*).

Figure 3: Create Manifest – Step 1 Header Section

ADD HEADER INFORMATION TO THE MANIFEST

- At the top of the **Truck Manifest Trade Portal**:
 - Select the **Create** button to display the drop-down menu.
 - In the **Create** drop-down menu, select the **Manifest** option.



- In the **Create Manifest** landing page, in the **Header** section, complete the header information:

- In the **Carrier *** field, the Standard Carrier Alpha Code (SCAC) and name of the carrier account is prefilled. To change this field, highlight the existing SCAC and type a *different SCAC* or select from the drop-down menu.



NOTE: As the code is typed, a list of SCAC codes for the carrier account displays in a drop-down menu for possible selection.



- b. In the **Manifest Number *** field, the SCAC code from the **Carrier** field is prefilled in the **Manifest Number** field. Type the *manifest number*.

Manifest Number *
BDDD



NOTE: The combination of the SCAC and manifest number was previously referred to as the trip number.

- c. In the **Estimated Date of Arrival *** field, type the *estimated arrival date* in MM/DD/YYYY format or select the **Calendar** icon and select the estimated arrival date.

Estimated Date of Arrival *
MM/DD/YYYY



NOTE: The **Estimated Date of Arrival** calendar defaults to the current date when selected.

- d. In the **Estimated Time of Arrival *** field, type the *estimated arrival time* in HH:MM local time format or select the **Clock** icon and select the estimated arrival time.

Estimated Time of Arrival *
Local Arrival Port Time HH:MM

- e. In the **Estimated Port of Arrival *** field, type the *name or port code of the estimated arrival port* or select the port from the drop-down menu.

Estimated Port of Arrival *
BU
0207 - BURLINGTON, VT
0901 - BUFFALO-NIAGARA FA
3305 - BUTTE, MT



NOTE: As a port code is typed, the list of approved ports displays in a drop-down menu for possible selection.

- f. The **Is this an in-transit manifest? *** indicator is set to **No** by default. If this is an in-transit manifest, select the **Yes** radio button.

Is this an in-transit manifest? *
 Yes No

3. Select a button option at the bottom right of the **Header** section:

Close Save as Draft Next

- a. Select the **Close** button to exit the **Create Manifest** process without saving the **Header** information. In the **Are you sure you would like to close this Manifest?** dialog box, select the **Yes** or **No** button.
- b. Select the **Save as Draft** button to save the **Header** information for now and complete the **Create Manifest** process later. All fields must be completed.
- c. Select the **Next** button to save the **Header** information and move forward to the next step to select or add crew. All fields must be completed.

In the next **Crew** step, a check mark will display for the **Header** step at the top of the **Create Manifest** page indicating that it is complete.





TOPIC 3: STEP 2 CREW – DRIVERS AND PASSENGERS

INTRODUCTION

The **Create Manifest – Step 2 Crew** section allows adding crew to the manifest by selecting a crewmember saved to the carrier account or adding a new crewmember (driver or passenger). FAST ID drivers and passengers are added on a one-time basis and are not saved to the carrier account.

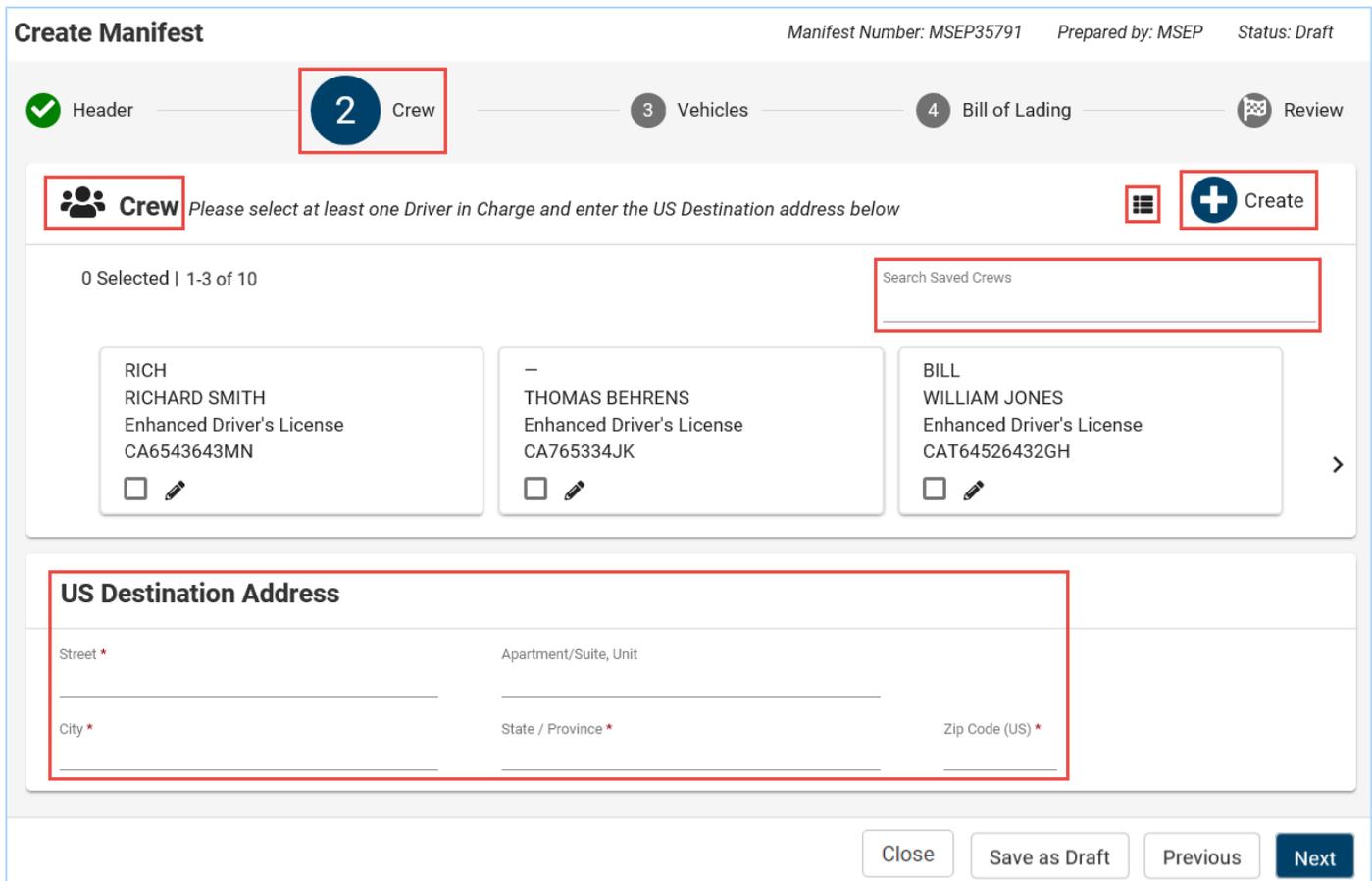
All drivers currently saved to the carrier account will display in the selectable **Crew Cards** that display by default in the **Crew** section. The **Table View** icon  displays the crew information in a table format.

The **Search** filter locates a particular crewmember when numerous cards are displayed. The **Forward** icon  allows viewing additional cards.

The **Crew Cards** can be selected with the checkbox or updated with the **Edit** icon . An **X** icon  in the upper right of the card indicates an issue with the crewmember information. Select the **Edit** icon to resolve it.

The **Create** button allows adding a new crewmember to the manifest. The process to add and save a crewmember to the carrier account is presented in the **Maintain Account Data QRG**.

The **US Destination Address** information for the crewmember can be added before moving to the next step in the **Create Manifest** process. Fields that are required are marked with an asterisk (*).



The screenshot shows the 'Create Manifest' interface. At the top, it displays 'Manifest Number: MSEP35791', 'Prepared by: MSEP', and 'Status: Draft'. Below this is a progress bar with five steps: 1. Header (checked), 2. Crew (highlighted with a red box), 3. Vehicles, 4. Bill of Lading, and 5. Review. The 'Crew' section is active, showing a 'Crew' header with a 'Create' button (highlighted with a red box) and a 'Search Saved Crews' input field (highlighted with a red box). Below the search field are three crew cards. Each card displays the name, license type, and license number, along with a checkbox and an edit icon. The first card is for RICH RICHARD SMITH (CA6543643MN), the second for THOMAS BEHRENS (CA765334JK), and the third for BILL WILLIAM JONES (CAT64526432GH). Below the crew cards is a 'US Destination Address' form with fields for Street, Apartment/Suite, Unit, City, State / Province, and Zip Code (US), all marked with an asterisk to indicate they are required. At the bottom of the form are buttons for 'Close', 'Save as Draft', 'Previous', and 'Next'.

Figure 4: Create Manifest – Step 2 Crew Section – Crew Cards



TABLE VIEW

The **Table View** icon displays the crewmember and address information in the **Crew** section in a table format list. The **Crew** and **US Address** tabs at the top allow displaying the table list for crewmembers and US destination addresses. Select the **Table View** icon again to return to displaying the **Crew Cards**.

Nickname	First Name	Last Name	Crew Type	Document Type	Document ID	In Charge
AR1	ARIF	RASMI	Crew	Enhanced Driver's License	DN01	<input type="checkbox"/>
JMAC	JAMES	SIMON	Crew	Enhanced Driver's License	US7509124	<input type="checkbox"/>
—	BILL	BOB	Crew	Enhanced Driver's License	1234567890123	<input type="checkbox"/>

Figure 5: Create Manifest – Step 2 Crew Section – Table View

SEARCH FILTER

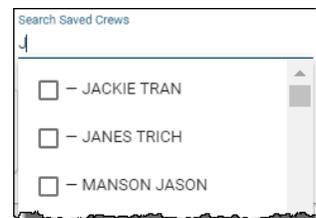
The **Search Saved Crews** filter allows searching for specific crewmembers displayed in the **Crew** section that are associated with the account or newly added.

USE THE SEARCH FILTER

1. Select the **Search Saved Crews** field to display the drop-down list of crewmembers added to the account or saved to the manifest.
2. If necessary, type a name or partial name to narrow the list.



NOTE: As you type, the list of crewmembers narrows to only those names that match the typed text.

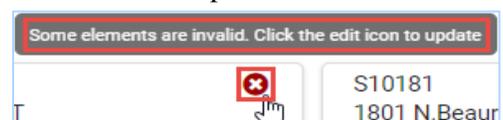


3. In the drop-down list of crewmembers, select the checkbox for a specific crewmember. This selects the corresponding **Crew Card** as well.



EDIT CREW INFORMATION

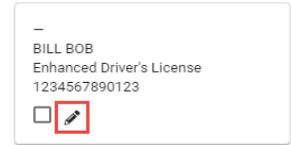
The **Edit** icon in the **Crew Card** allows updating the crewmember information. An **X** icon in the upper right of the card indicates an issue with the information. Hover over the **X** icon for an explanation.





EDIT CREW INFORMATION

1. In the lower left corner of a **Crew Card**, select the **Edit** icon.
The **Edit Crew** pane displays.
2. In the **Edit Crew** pane, update the information fields as appropriate.



Crew Enter Crew Information then add to Manifest

Type of Crew *

Driver Driver with FAST ID Passenger

First Name *	Last Name *	Middle Name	Suffix
BILL	BOB	A	Jr. ▼
Date of Birth *	Country of Citizenship *	Gender *	
01/01/1990	US - UNITED STATES	<input checked="" type="radio"/> Male <input type="radio"/> Female	

Documents

Document Type *	Document Number *	Country *	State / Province *	
Enhanced Driver's License (... ▼)	1234567890123	US - UNITED STATES	GA - Georgia	

Add New Document

3. In the bottom right corner of the pane, select the **Update** button.

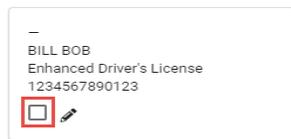
ADD SAVED CREW CARDS TO THE MANIFEST

The **Checkbox** in a **Crew Card** allows selecting a specific crewmember to add to the manifest. If a US destination address needs to be added, the **US Destination Address** section allows adding the address information. Fields that are required are marked with an asterisk (*).

ADD SAVED DRIVERS TO THE MANIFEST

1. In the lower left corner of the **Crew Card**, select the **Checkbox**.

The selected **Crew Card** is checked and highlighted to indicate it is added to the manifest.



NOTE: Select the **Checkbox** again to deselect the specific **Crew Card** and remove the crewmember from the manifest.





2. To add a US destination address, in the **US Destination Address** section:
 - a. In the **Street *** field, type the *street address*.
 - b. If appropriate, in the **Apartment/Suite, Unit** field, type an *apartment, suite, or unit number*.
 - c. In the **City *** field, type the *name of the city*.
 - d. In the **State/Province *** field, type the *name or 2-digit state code or the province name* or select from the drop-down menu.
 - e. In the **Zip Code (US) *** field, type the *zip code*.

ADD A ONE-TIME DRIVER OR PASSENGER TO THE MANIFEST

The **Create** button in the **Crew** section allows adding a one-time driver not previously saved to the carrier account, FAST ID driver, or passenger to the manifest. Fields that are required are marked with an asterisk (*). Passengers cannot be added to the carrier account. Adding FAST ID drivers to the carrier account is future functionality.

ADD ONE-TIME DRIVERS OR PASSENGERS TO THE MANIFEST

1. In the **Crew** section, select the **Create** button.

The **Add Crew** pane displays.

Crew Enter Crew Information then add to Manifest

Type of Crew *

Driver Driver with FAST ID Passenger

First Name * Last Name * Middle Name Suffix

Date of Birth * Country of Citizenship * Gender *

MM/DD/YYYY Male Female

Documents

Document Type *	Document Number *
<input type="text"/>	<input type="text"/>

Nickname

Save to Account?*

Yes No





2. In the **Type of Crew *** field, select the **Driver**, **Driver with FAST ID**, or **Passenger** radio button.

Type of Crew *

Driver Driver with FAST ID Passenger

3. For the **Driver with FAST ID**, in the **Fast Identification Number** field, type the *driver's FAST ID*. The FAST ID will be validated.

FAST Identification Number

4. For the **Driver** (not FAST ID) or **Passenger**:

- In the **First Name *** field, type the *first name*.
- In the **Last Name *** field, type the *last name*.
- If appropriate, in the **Middle Name** field, type the *middle name*.
- If appropriate, in the **Suffix** field, type a *suffix for the name*.
- In the **Date of Birth *** field, type the *birth date* in MM/DD/YYYY format or select the date from the calendar.
- In the **Country of Citizenship *** field, type the *country of citizenship* and select it from the displayed menu.
- For the **Gender ***, select the **Male** or **Female** radio button.

5. For the **Driver** (not FAST ID) or **Passenger**, in the **Documents** section:

- a. Select the **Document Type *** drop-down menu and select a document type.



NOTE: WHTI documentation is not required when using an Enhanced Driver's License since it provides the mandatory information.

- In the **Document Number *** field, type the *document number*.
- If appropriate, in the **Country *** field, type the *country of the document* and select it from the displayed menu.
- If appropriate, in the **State/Province *** field, type the *state or province of the document* and select it from the displayed menu.
- If a document is added in error, select the **Delete** icon  to delete it.
- Select the **Add New Document** button to add more documents.

6. If appropriate, in the **Nickname** field, type the *nickname*.

7. For the **Driver** (not FAST ID), for **Save to Account? ***:

- Select the **No** radio button to add the driver to only the manifest.
- Select the **Yes** radio button to add the driver to the manifest and the carrier account.

The **Nickname** field displays. If appropriate, type a *nickname for the driver*.

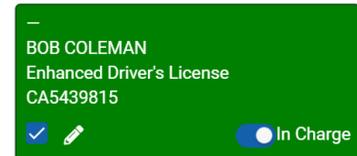
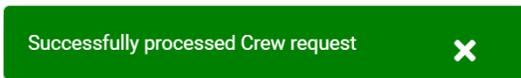




NOTE: For the **Driver with FAST ID** and **Passenger** crew types, the **Save to Account?** * option is grayed out and not available at this time.

8. Select the **Add** button.

A successfully processed message displays and the new **Crew Card** displays with highlighting and a check mark. The driver **In charge** indicator is set by default.



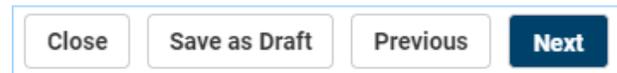
NOTE: Selecting more than one driver changes the **In Charge** indicator setting. Use the slide to set or unset the **In Charge** indicator for the specific driver.

COMPLETE THE PROCESS TO ADD CREW TO THE MANIFEST

Once a crewmember is selected to be added to the manifest, the button options at the bottom of the **Crew** section determine how to proceed; close the section, save the information as draft, move backward to the previous step, or move forward to the next step.

COMPLETE PROCESS TO ADD CREWMEMBERS TO THE MANIFEST

1. Select a button option at the bottom right of the **Crew** section:



- a. Select the **Close** button to exit the **Crew** section without saving. In the **Are you sure you would like to close this Manifest?** dialog box, select the **Yes** or **No** button.
- b. Select the **Save as Draft** button to save the **Crew** information for now and complete the **Create Manifest** process later.
- c. Select the **Previous** button to save the **Crew** information and move backward to the previous step for **Header** information.
- d. Select the **Next** button to save the **Crew** information and move forward to the next step to select or add vehicles. A check mark will display for the **Crew** step at the top indicating that it is complete. However, if there is an issue with the **Crew** information, such as missing **US Destination Address** information, an **X**  will display for the **Crew** step instead.

TOPIC 4: STEP 3 VEHICLES – CONVEYANCE AND EQUIPMENT

INTRODUCTION

The **Create Manifest – Step 3 Vehicles** section allows adding vehicles to the manifest by selecting a conveyance and/or equipment saved to the carrier account or adding new vehicles.

All conveyances and equipment currently saved to the carrier account will display in the **Conveyance and Equipment Cards** that display by default in the **Vehicles** section. The **Table View** icon displays the vehicles information in a table format.

The **Search** filter locates a particular conveyance or equipment when numerous cards are displayed. The **Forward** icon allows viewing additional cards.

The **Conveyance and Equipment Cards** can be selected with the checkbox or updated with the **Edit** icon . An **X** icon in the upper right of the card indicates an issue with the conveyance or equipment information. Select the **Edit** icon to resolve it.

The **Create** button allows adding a new conveyance and/or equipment to the manifest. Reference the **Maintain Account Data QRG** for the details to add and save a conveyance or equipment to the carrier account.

The screenshot shows the 'Create Manifest' interface. At the top, there are progress indicators: Header (checked), Crew (checked), Vehicles (3, highlighted with a red box), Bill of Lading (checked), and Review (X icon). Below this is the 'Vehicles' section, which includes a search bar and a 'Create' button (highlighted with a red box). The 'Conveyance' section shows 0 selected items out of 614, with a search bar for 'Search Saved Conveyances'. It displays three cards: 'ARMORED TRUCK #AR482191 MD - JEJ190', 'BOX TRUCK #1 MI - HGT9393', and 'BOX TRUCK #1 BC - BRGT282'. The 'Equipment' section shows 0 selected items out of 68, with a search bar for 'Search Saved Equipment'. It displays three cards: 'SEMI-TRUCK TRAILER #A92611 CA - SBXLV', 'SEMI-TRUCK TRAILER #HEINZE VA - 57057', and 'TRAILER DRY FREIGHT #S501 BC - 20671D'. At the bottom, there are buttons for 'Close', 'Save as Draft', 'Previous', and 'Next'.

Figure 6: Create Manifest - Step 3 Vehicles Section – Conveyances and Equipment Cards

TABLE VIEW

The **Table View** icon displays the conveyance and equipment information in the **Vehicles** section in a table format list. The **Conveyance** and **Equipment** tabs at the top allow displaying the table list for each of the different types of vehicles. Select the **Table View** icon again to return to displaying the **Conveyance** and **Equipment Cards**.

Conveyance Type	Conveyance Number	Plate
TRACTOR	#1	VA - XXXX45
BOX TRUCK	#BT346	NY - JJJ2174
ARMORED TRUCK	#AR482191	MD - JEJ190

Figure 7: Create Manifest - Step 3 Vehicles Section – Table View

SEARCH FILTER

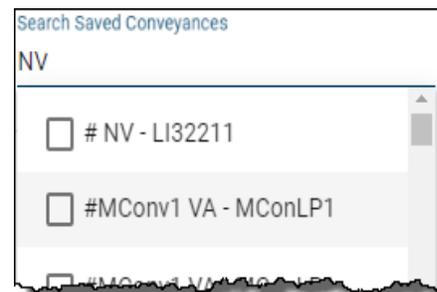
The **Search Saved Conveyances** and **Search Saved Equipment** filters allow searching for specific conveyances and equipment displayed in the **Vehicles** section that are associated with the account or newly added.

USE THE SEARCH FILTER

1. Select the **Search Saved Conveyances** or the **Search Saved Equipment** field to display the drop-down list of conveyances or equipment added to the account or saved to the manifest.
2. If necessary, type a name or partial name to narrow the list.



NOTE: As you type, the list of conveyances or equipment narrows to only those names that match the typed text.



3. In the drop-down list of conveyances or equipment, select the checkbox for a specific conveyance or equipment. This selects the corresponding **Conveyance** or **Equipment Card** as well.



EDIT VEHICLE INFORMATION

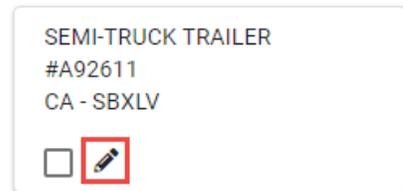
The **Edit** icon  in the **Conveyance** or **Equipment Card** allows updating the conveyance or equipment information. An **X** icon  in the upper right of the card indicates an issue with the information. Hover over the **X** icon for an explanation.



EDIT CONVEYANCE OR EQUIPMENT INFORMATION

1. In the lower left corner of a **Conveyance** or **Equipment Card**, select the **Edit** icon.

The **Edit Vehicles** pane displays.



2. In the **Edit Vehicles** pane, update the information fields as appropriate.
If appropriate, review and update the **License Plates**, **Insurance**, and **Seal** sections.

 **Vehicles** *Enter Vehicle Informn add to Manifest*

Part of Vehicle *

Conveyance Equipment

Equipment Type * Equipment Number

Semi-Truck Trailer A92611

License Plates

License Plate Number *	Country of Registration *	State / Province *	
SBXLV	US - UNITED STATES	CA - California	

 Add New License Plate

Seal

Seal Number

0127S2 

 Add New Seal

3. In the bottom right corner of the pane, select the **Update** button.

ADD SAVED VEHICLE CARDS TO THE MANIFEST

The **Checkbox** in **Conveyance** and **Equipment Cards** allows selecting a specific conveyance or equipment to add to the manifest.

ADD A SAVED CONVEYANCE AND EQUIPMENT TO THE MANIFEST

1. In the lower left corner of a **Conveyance** or **Equipment Card**, select the checkbox.

SEMI-TRUCK TRAILER
#A92611
CA - SBXLV

The selected **Conveyance** or **Equipment Card** is checked and highlighted to indicate it is added to the manifest.

SEMI-TRUCK TRAILER
#A92611
CA - SBXLV



NOTE: Select the **Checkbox** again to deselect the specific **Conveyance** or **Equipment Card** and remove the conveyance or equipment from the manifest.

2. If appropriate, select the **Edit** icon in the **Conveyance** or **Equipment Card** to edit the HAZMAT insurance and seal information.

Reference the [Edit Vehicle Information](#) section above for details.

Insurance *Required if carrying HAZMAT*

Company Name	Policy Number	Liability Amount	Policy Year
_____	_____	_____	YYYY

Seal

Seal Number _____

Add New Seal

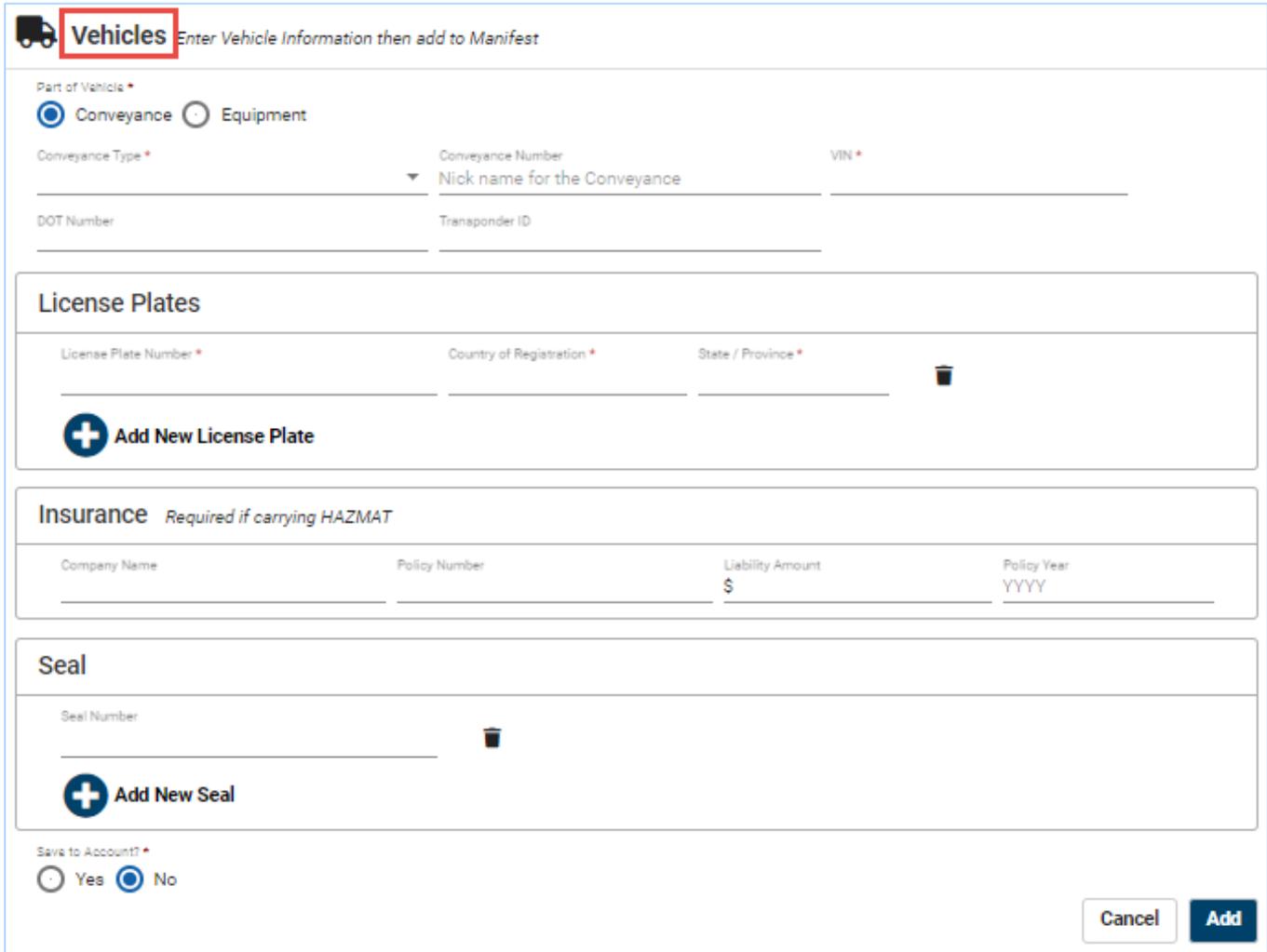
ADD A NEW CONVEYANCE OR EQUIPMENT TO THE MANIFEST

The **Create** button in the **Vehicles** section allows adding a new conveyance or equipment to the manifest not previously saved to the account. Fields that are required are marked with an asterisk (*). A **Save to Account** option allows adding the new conveyance or equipment to the carrier account as well as the manifest.

ADD A NEW CONVEYANCE OR EQUIPMENT TO THE MANIFEST

1. In the **Vehicles** section, select the **Create** button.

The **Add Vehicles** pane displays.



Vehicles Enter Vehicle Information then add to Manifest

Part of Vehicle *
 Conveyance Equipment

Conveyance Type *
Conveyance Number
VIN *
Nick name for the Conveyance

DOT Number
Transponder ID

License Plates

License Plate Number *
Country of Registration *
State / Province *
+ Add New License Plate

Insurance Required if carrying HAZMAT

Company Name
Policy Number
Liability Amount \$
Policy Year YYYY

Seal

Seal Number
+ Add New Seal

Save to Account? *
 Yes No

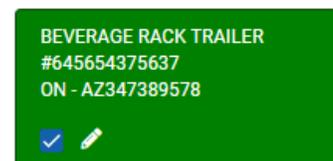
Cancel Add

2. For **Part of Vehicle ***, select the **Conveyance** or **Equipment** radio button.
3. For the **Conveyance**:
 - a. Select the **Conveyance Type** drop-down menu and select the type of conveyance.
 - b. If appropriate, in the **Conveyance Number** field, type a *nickname for the conveyance*.
 - c. In the **VIN *** field, type the *VIN of the conveyance*.
 - d. If appropriate, in the **DOT Number** field, type the *DOT number of the conveyance*.
 - e. If appropriate, in the **Transponder ID** field, type the *transponder ID*.



4. For the **Equipment**:
 - a. Select the **Equipment Type** drop-down menu and select the type of equipment.
 - b. If appropriate, in the **Equipment Number** field, type a *nickname for the equipment*.
5. In the **License Plates** section:
 - a. In the **License Plate Number *** field, type the *license plate number*.
 - b. In the **Country of Registration *** field, type the *country* and select it from the displayed menu.
 - c. In the **State/Province *** field, type the *state or province* and select it from the displayed menu.
 - d. Select the **Add New License Plate** button to add additional license plates.
6. If carrying HAZMAT, in the **Insurance** section:
 - a. In the **Company Name** field, type the *insurance company name*.
 - b. In the **Policy Number** field, type the *insurance policy number*.
 - c. In the **Liability Amount** field, type the *amount of insurance liability*.
 - d. In the **Policy Year** field, type the *insurance policy issuance year* in YYYY format.
7. If the vehicle contains a seal, in the **Seal** section:
 - a. In the **Seal Number** field, type the *seal number*.
 - b. Select the **Add New Seal** button to add additional seal numbers.
8. For **Save to Account? ***:
 - a. Select the **No** radio button to add the vehicle to only the manifest.
 - b. Select the **Yes** radio button to add the vehicle to the manifest and the carrier account.
9. Select the **Add** button.

The new **Vehicle Card** displays with highlighting and a check mark.



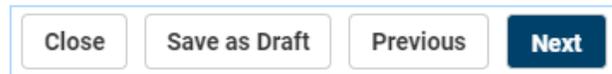


COMPLETE THE PROCESS TO ADD VEHICLES TO THE MANIFEST

Once a conveyance and/or equipment is selected to be added to the manifest, the button options at the bottom of the **Vehicles** section determine how to proceed; close the section, save the information as draft, move backward to the previous step, or move forward to the next step.

COMPLETE PROCESS TO ADD VEHICLES TO THE MANIFEST

1. Select a button option at the bottom right of the **Vehicles** section:



- a. Select the **Close** button to exit the **Vehicles** section without saving. In the **Are you sure you would like to close this Manifest?** dialog box, select the **Yes** or **No** button.
- b. Select the **Save as Draft** button to save the **Vehicles** information for now and complete the **Create Manifest** process later.
- c. Select the **Previous** button to save the **Vehicles** information and move backward to the previous step for **Crew** information.
- d. Select the **Next** button to save the **Vehicles** information and move forward to the next step to select or add bill of lading information. A check mark will display for the **Vehicles** step at the top indicating that it is complete.





TOPIC 5: STEP 4 BILL OF LADING

INTRODUCTION

The next step in the **Create Manifest** process is to add shipment Bill of Lading (BOL) information to the manifest. The **Create Manifest – Step 4 Bill of Lading** section allows adding a bill of lading to the manifest by selecting a BOL previously saved or adding a new BOL. Creating and saving a BOL for a future manifest is useful if the shipment information is available prior to creation of the manifest.

Saving a BOL to the carrier account is future functionality. Saved BOLs display in the **Bill of Lading** tab rather than the **Account** tab.

All bills of lading previously saved will display in the **BOL Cards** in the **Bill of Lading** section. The **Table View** icon  displays the bill of lading information in a table format.

The **Search** filter locates a particular BOL when numerous cards are displayed. The **Forward** icon  allows viewing additional cards.

The **BOL Cards** can be selected with the checkbox or updated with the **Edit** icon . An **X** icon  in the upper right of the card indicates an issue with the bill of lading information. Select the **Edit** icon to resolve it.

The **Create** button allows adding a new bill of lading to the manifest. Reference the **Create a Bill of Lading QRG** for more detailed information to create a BOL.

Create Manifest Manifest Number: ZZZZ99567 Prepared by: ZZZZ Status: Draft

Header Crew Vehicles **4 Bill of Lading** Review

Bill of Lading Please select one or more Bills of Lading   Create

0 Selected | 1-3 of 128 Search Saved Bol/Manifest

ZZZZ99357 (SIMPLE) ANIXSTER CANADA INC MYMM CONVEYANCE <input type="checkbox"/> 	ZZZZ99246 (SIMPLE) CANADA EXPORT CO DEVBUG CONVEYANCE <input type="checkbox"/> 	ZZZZ99123 (SIMPLE) GARY SHIPPER MYMM CONVEYANCE <input type="checkbox"/> 
---	--	--

Close Save as Draft Previous **Next**

Figure 8: Create Manifest – Step 4 Bill of Lading Section – BOL Cards





TABLE VIEW

The **Table View** icon  displays the BOL information in the **Bill of Lading** section in a table format list. Select the **Table View** icon again to return to displaying the **BOL Cards**.

Bill of Lading + Create										
Search BOL Number	Arrival Start Date	Arrival End Date	Arrival Port	Manifested Status						
	05/13/2020	07/12/2020		x Clear Search						
328 of 328 Results 										
BOL	Prepared By	Type	Est. Date of Arrival	Est. Port of Arrival	Shipper	Consignee	Description	Manifest Number	Entry Status	Actions
ZZZZ04232020M1	ZZZZ	In-Bond	5/21/2020, 12:00 AM	W TEXAS - NEW MEXICO CMC	Split party	TEST CONSIGNEE	CARGO1	ZZZZAAAAA2	Not on File	
ZZZZ06M4	ZZZZ	Simple Bill	6/1/2020, 12:00 AM	W TEXAS - NEW MEXICO CMC	ANIXSTER CANADA INC	BEST WOOLENS LLC	CAR	ZZZZ06012020MAN1	Not on File	
ZZZZ900217	ZZZZ	Instruments of International Traffic	6/1/2020, 12:00 AM	PORTLAND, ME				ZZZZ04302020MAN1	N/A	
			5/29/2020	NEW ORLEANS		TEST			Not on	

Figure 9: Create Manifest – Step 4 Bill of Lading Section – Table View

SEARCH FILTER

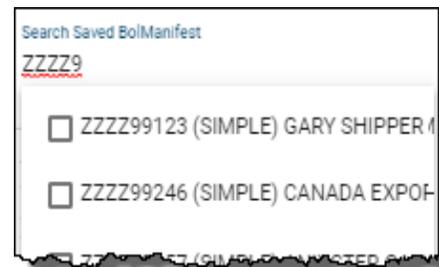
The **Search Saved BOL/Manifest** filter allows searching for specific BOLs displayed in the **Bill of Lading** section that are saved or associated with the manifest.

USE THE SEARCH FILTER

1. Select the **Search Saved BOL/Manifest** field to display the drop-down list of BOLs added or saved to the manifest.
2. If necessary, type a name or partial name to narrow the list.



NOTE: As you type, the list of BOLs narrows to only those names that match the typed text.



3. In the drop-down list of bills of lading, select the checkbox for a specific BOL. This selects the corresponding **BOL Card** as well.





EDIT BILL OF LADING INFORMATION

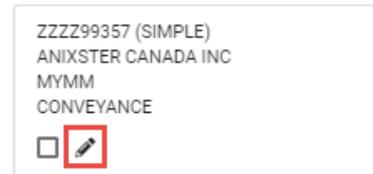
The **Edit** icon  in the **BOL Card** allows updating the bill of lading information. An **X** icon  in the upper right of the card indicates an issue with the information. Hover over the **X** icon for an explanation.



EDIT BILL OF LADING INFORMATION

1. In the lower left corner of a **BOL Card**, select the **Edit** icon.

The **Header** section of the **Edit BOL** pane displays.



2. In the **Edit BOL** pane, update the header information fields as appropriate.

3. If appropriate, select the **Commercial Parties** step at the top; select the **Edit** icon  for a **Shipper** or **Consignee Card**, and update the shipper or consignee information.
4. If appropriate, select the **Commodities** step at the top; select the **Edit** icon  for a **Commodity Card**, and update the commodity information.
5. Select the **Review** step at the top, review all BOL information, and select the **Save** button.

The **Bill of Lading** section of the **Edit Manifest** pane displays.

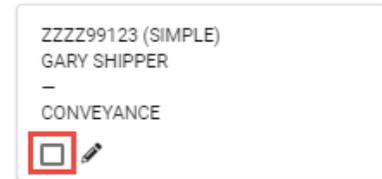


ADD SAVED BOL CARDS TO THE MANIFEST

The **Checkbox** in a **BOL Card** allows selecting a specific bill of lading to add to the manifest.

ADD A SAVED BILL OF LADING TO THE MANIFEST

1. In the lower left corner of a **Bill of Lading Card**, select the **Checkbox**.



The selected **BOL Card** is checked and highlighted to indicate it is added to the manifest.



NOTE: Select the **Checkbox** again to deselect the specific **BOL Card** and remove the BOL from the manifest.



ADD A NEW BOL TO THE MANIFEST

The **Create** button in the **Bill of Lading** section allows adding a new BOL to the manifest not previously saved. Fields that are required are marked with an asterisk (*).

ADD BILL OF LADING INFORMATION TO THE MANIFEST

1. In the **Bill of Lading** section, select the **Create** button.
The **Header** section of the **Create BOL** pane displays with current manifest information prefilled in many fields.
2. The **Bill Issuer SCAC *** field is prefilled with the SCAC of the carrier account. To change this SCAC, highlight the existing SCAC and type the *new* SCAC.
3. In the **Bill of Lading Number *** field (formerly Shipment Control #), type the *BOL number* to add to the manifest.
4. The **House Bill of Lading Number** field is gray indicating this field is not currently available but may be included in a future release.
5. Select the **Bill of Lading Type *** (formerly Shipment Release Type) drop-down menu and select the type of bill of lading



NOTE: **Simple Bill** was formerly Pre-Arrival Processing System (PAPS).

In-Bond requires entering additional fields as appropriate (In-Bond Type and Number, Bonded Carrier ID, Onward Carrier SCAC, and Transfer Bonded Carrier ID) and more depending on In-Bond Type (US Port of Destination, Foreign Port of Destination, Est Date of Departure from US, Mexican Pedimento Number, and Canadian BOL Number). In addition, as appropriate when the commodity is added later (Customs Shipment Value).

Section 321 and 3311-US Goods Returned requires entering additional fields when the commodity is added later (Customs Shipment Value and Country of Origin).

GN1 Exemptions/Goods Astray requires answering the “Is it Goods Astray?” question with a Yes or No response. A Yes response requires entering a Date of Departure from US and affirming that goods have not left carrier or foreign countries custom control.

Instruments of International-Traffic (IIT) requires entering an additional field (Bonded Carrier ID).



IMPORTANT: For IITs, a bill with an IIT bill type must be created.

The four types grayed out at the bottom of the drop-down menu (Carnet, DOD, FTZ, and International Mail) are future functionality.

6. The **Estimated Date of Arrival *** field is prefilled with the manifest date. To change this date, highlight the existing date and type the *estimated arrival date* in MM/DD/YYYY format or select the **Calendar** icon  and select the date.
7. The **Estimated Time of Arrival *** field is prefilled with the manifest time. To change this time, highlight the existing time and type the *estimated arrival time* in HH:MM local time format or select the **Clock** icon  and select the time.
8. The **Estimated Arrival Port *** field is prefilled with the manifest port. To change this port, highlight the existing port and type the *name or port code of the first expected US port of arrival* or select from the drop-down menu.



NOTE: As a name or port code is typed, the list of approved ports displays in a drop-down menu for possible selection.

9. In the **Port of Lading *** field, type the *name or port code of the foreign port of lading* or select from the drop-down menu.



NOTE: As a name or port code is typed, the list of approved ports displays in a drop-down menu for possible selection.

If the cargo wasn't loaded at a port, select the nearest port to the cargo loading location.

10. If appropriate, in the **Place of Receipt** field, type the *city or country where the carrier took possession of the cargo*.
11. If appropriate, in the **Authorized SCAC** field, type the *SCAC for the authorized carrier user*.
12. For **Is this subject to FDA requirements? ***:
 - a. If this BOL is subject to FDA requirements, select the **Yes** radio button.
 - b. If this BOL is not subject to FDA requirements, select the **No** radio button.
13. Select the **Next** button.

The **Commercial Parties** step displays to add the shipper and consignee to the BOL.

14. In the **Commercial Parties** section, in the specific **Shipper** and **Consignee Cards**, select the **Checkbox**.



15. If appropriate, in the **Secondary Notify Party** section, select the party type and type a party ID.

16. Select the **Next** button.

The **Commodities** step displays to add a commodity to the BOL.

17. In the **Commodities** section, select the **Create** button.

18. In the **Commodities** section, select and type the required fields.

Reference the **Add a New Commodity to the BOL** section in **Topic 4: Step 3 Commodities** of the **Create a Bill of Lading QRG** for more details.

19. Select the **Add** button.

The added **Commodity Card** displays with highlighting and a check mark.

20. Select the **Next** button.

The **Review** step displays to review the added BOL information.

21. Select the **Save** button.

The successfully created BOL message dialog box displays.

22. In the message dialog box, select the **OK** button.

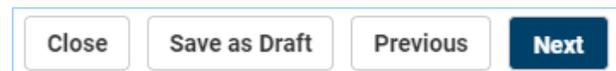
The **Bill of Lading** step displays and the newly added **BOL Card** displays with highlighting and a check mark.

COMPLETE THE PROCESS TO ADD BOLs TO THE MANIFEST

Once a bill of lading is selected to be added to the manifest, the button options at the bottom of the **Bill of Lading** section determine how to proceed; close the section, save the information as draft, move backward to the previous step, or move forward to the next step.

COMPLETE PROCESS TO ADD BOLs TO THE MANIFEST

1. Select a button option at the bottom right of the **Bill of Lading** section:



- a. Select the **Close** button to exit the **Bill of Lading** section without saving. In the **Are you sure you would like to close this Manifest?** dialog box, select the **Yes** or **No** button.
- b. Select the **Save as Draft** button to save the **Bill of Lading** information for now and complete the **Create Manifest** process later.
- c. Select the **Previous** button to save the **Bill of Lading** information and move backward to the previous step for **Vehicle** information.
- d. Select the **Next** button to save the **Bill of Lading** information and move forward to the next step to review the manifest information. A check mark will display for the **Bill of Lading** step at the top indicating that it is complete.



TOPIC 6: FINAL STEP REVIEW AND SUBMIT MANIFEST

The final step in the **Create Manifest** process is to review all the manifest information and edit any information as required. If a step contains validation errors or is missing information, the step title will display an **X** rather than a check mark.

The **Edit** icon at the top right of the **Header**, **Crews**, **Vehicles**, and **Bill of Lading** sections and the step titles at the top of the **Create Manifest** page displays the corresponding section pane. This allows editing the displayed information or changing the selected cards.

Create Manifest Manifest Number: ZZZZ12468 Prepared by: ZZZZ Status: Draft

✓ Header ✓ Crew ✓ Vehicles ✓ Bill of Lading **Review**

Header ✓

Carrier: ZZZZ - SCAC Code ZZZZ Spring Manifest Number: ZZZZ12468 Est. Port of Arrival: 0901 - BUFFALO-NIAGARA FALLS
Est. Date and Time: 2/14/2020, 12:00 PM In-Transit Manifest? No

Crews ✓ 1 of 1
BILL BOB
Enhanced Driver's License
1234567890123
100 CONTROLS AVE NEW YORK CITY, NY 1...

Vehicles ✓ 1 of 2
BOX TRUCK
#BT346
NY - JJJ2174

Bill of Lading ✓ 1 of 1
ZZZZ99357 (SIMPLE)
ANIXSTER CANADA INC
MYMM
CONVEYANCE

Save as template?
 Yes No

Close Previous **Submit to CBP**

Figure 10: Create Manifest – Final Step Review Section

REVIEW AND EDIT THE MANIFEST INFORMATION

The **Review** step includes the **Header**, **Crews**, **Vehicles**, and **Bill of Lading** sections. Select the step title at the top or the **Edit** icon at the top right of the section to edit that section.



REVIEW AND EDIT THE HEADER INFORMATION

1. In the **Review** pane, review the information in the **Header** section.
2. To edit the header information:
 - a. Select the **Header** step title at the top or the **Edit** icon  at the top right of the **Header** section.
The **Header** pane displays.
 - b. Update the appropriate header information fields.
 - c. Select the **Review** step at the top to save your edits and return to the **Review** pane.

REVIEW AND EDIT THE CREW INFORMATION

1. In the **Review** pane, review the information in the **Crews** section.
2. To change to another crewmember:
 - a. Select the **Crew** step title at the top or the **Edit** icon  at the top right of the **Crews** section.
The **Crew** pane displays the **Crew Cards**.
 - b. Select the checkbox of the highlighted **Crew Card** to deselect it.
 - c. Select the checkbox in the **Crew Card** of the changed crewmember.
3. To change the information of a specific crewmember:
 - a. Select the **Edit** icon  at the bottom left of the **Crew Card**.
The **Crew** pane displays the crew information.
 - b. Update the appropriate crew and documents information fields.
 - c. Select the **Update** button to save the edits.
4. To update the **US Destination Address** information of the crewmember:
 - a. Select the **Crew** step title at the top or the **Edit** icon  at the top right of the **Crews** section.
The **Crew** pane displays.
 - b. Update the appropriate address fields.
 - c. Select the **Update** button to save the edits.
5. If appropriate, select the **Review** step at the top to return to the **Review** pane.



REVIEW AND EDIT THE VEHICLES INFORMATION

1. In the **Review** pane, in the **Vehicles** section, review the **Conveyance** and **Equipment Cards**. The **Forward** icon  allows viewing additional cards.
2. To change which vehicles are included in the manifest:
 - a. Select the **Vehicles** step title at the top or the **Edit** icon  at the top right of the **Vehicles** section.
The **Vehicles** pane displays the **Conveyance** and **Equipment Cards**.
 - b. Select the checkbox of the highlighted **Conveyance** and/or **Equipment Cards** to deselect it.
 - c. Select the checkbox in the **Conveyance** and/or **Equipment Cards** of the changed vehicles.
 - d. Select the **Review** step at the top to return to the **Review** pane. The changes are saved and the updated card selections display in the **Vehicles** section.
3. To change the information of a specific conveyance or equipment:
 - a. Select the **Edit** icon  at the bottom left of the **Conveyance** or **Equipment Card**.
The **Vehicles** pane displays information for the specific conveyance or equipment.
 - b. Update the appropriate vehicle, license plate, insurance, and/or seal information fields.
 - c. Select the **Update** button to save the edits.
 - d. Select the **Review** step at the top to return to the **Review** pane.

REVIEW AND EDIT THE BILL OF LADING INFORMATION

1. In the **Review** pane, review the information in the **Bill of Lading** section.
2. To change which bill of lading is included in the manifest:
 - a. Select the **Bill of Lading** step title at the top or the **Edit** icon  at the top right of the **Bill of Lading** section.
The **Bill of Lading** pane displays the **Bill of Lading Card(s)**.
 - b. Select the checkbox of the highlighted **Bill of Lading Card** to deselect it.
 - c. Select the checkbox in the **Bill of Lading Card** of the changed bill of lading.
3. To edit the information in the **Bill of Lading Card**:
 - a. Select the **Edit** icon  at the bottom left of the card.
The **Edit BOL – BOL Header** pane displays.



- b. To update a particular section of the bill of lading, select that section step at the top.
- c. In the section pane, complete the appropriate updates.



NOTE: Reference the **Create a Bill of Lading QRG** for more information about updating the bill of lading.

- d. Select the **Review** step at the top to return to the **Review** pane.
- e. Select the **Save** button.

The successfully updated BOL message dialog box displays.

- f. In the message dialog box, select the **OK** button.

The **Bill of Lading** pane displays.

- 4. Select the **Review** step at the top to return to the manifest **Review** pane.

COMPLETE THE PROCESS TO ADD OR SUBMIT THE MANIFEST

Once all the manifest information is accurate and complete, the manifest can be saved and added, printed, or submitted to CBP. The button options at the bottom of the **Review** step of the **Create Manifest** pane allow deciding how to proceed; close the step and add the manifest by saving the information as draft, move backward to the previous **Bill of Lading** step, print the manifest information, or submit the electronic manifest to CBP.

COMPLETE PROCESS TO ADD OR SUBMIT THE MANIFEST

- 1. Select a button option at the bottom right of the **Review** pane:



- a. Select the **Close** button to exit the manifest review process and save a draft of the manifest. In the **Are you sure you would like to close this Manifest?** dialog box, select the **Yes** or **No** button.
- b. Select the **Previous** button to save the manifest and move back to the **Bill of Lading** pane.
- c. Select the **Submit to CBP** button to save the manifest and submit it to CBP.

The **Manifest** dialog box displays. Select the **Print Manifest Coversheet** button to print the coversheet. Select the **Print Manifest** button to print the manifest information. Select the **OK** button to close the dialog box.

