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 TO THE ACCOUNT TAB**

This Quick Reference Guide (QRG) covers the Account tab of the Truck Manifest Trade Portal application and the functionality available to maintain the manifest elements of the account, such as crew, vehicles, and commercial parties.

The Account tab provides access to the Account Information, Crew, Vehicles, and Commercial Party subtabs. These subtabs are located on the Navigation bar which can be expanded to a text view or contracted to just the icon view.

![Account Tab - Expand and Contract Subtabs](image1)

The Account tab allows carriers to add, edit, or delete drivers, conveyances, equipment, shippers, and consignees on their carrier account. Crew, vehicles, and commercial parties that are saved to the carrier account can be easily selected and added when creating and completing information for manifests and BOLs.

**ACCOUNT INFORMATION**

When the Account tab is selected, the initial view is of the Account Information subtab. The Account Information page includes the Carrier name and information.

![Account Tab – Account Information Subtab](image2)
To change to another ACE Portal carrier account as the preparer for new manifests or bills of lading, select the **Change Carrier Account** drop-down menu and then select another carrier account. The new carrier name then displays at the top. Reference the **Access and Navigate the Truck Manifest Trade Portal QRG** for more details.

To edit the carrier information in the **Account Information** section, edit the account information in the **ACE Secure Data Portal**.

**MANIFEST ELEMENT SUBTABLES**

The **Account** subtabs displayed below represent each of the truck manifest elements:

- **Account Information** – displays carrier name and associated information
- **Crew** – displays current drivers associated with the carrier account.
- **Vehicles** – displays current equipment and conveyances associated with the carrier account.
- **Commercial Parties** – displays current shippers and consignees associated with the carrier account.

When adding new or editing existing crew, vehicles, or commercial parties, select the appropriate **Crew**, **Vehicles**, or **Commercial Parties** subtab to update the account as needed. The functionality related to viewing, adding, editing, and deleting account crew, vehicles, and commercial parties is covered in the topics that follow.
**TOPIC 2: MAINTAIN CREW**

This topic presents the functionality to add or edit drivers on the carrier account.

The **Account** tab, **Crew** page allows users to access the following:

- **Create** button
- **Search Saved Crews** filter
- **Crew Cards** (provide individual driver details)

![Figure 3: Crew Subtab](image)

Use the **Table View** icon next to the **Create** button to switch from the card view to a table view to display driver information in a table row format.

![Figure 4: Crew - Table View](image)
**SEARCH FILTER**

The **Search Saved Crews** filter allows searching for drivers associated with the account. Each saved driver has a **Crew Card** that includes name, nickname, and document information.

**USE THE SEARCH FILTER**

1. To search:
   - Select the **Search Saved Crews** field.
   - Type the *number or characters* for the search. As you type, the **Crew Card(s)** matching the entered search data display.

**CREATE BUTTON**

The **Crew** page **Create** button displays the **Add Crew** pane.

**ADD A DRIVER TO THE ACCOUNT**

1. At the top of the **Crew** page, select the **Create** button. The **Add Crew** pane displays.
NOTE: Note the asterisk beside some fields. When completing information throughout the Truck Manifest Trade Portal, an asterisk beside a field indicates that information must be provided.

Some fields are conditional, meaning they may change based on a selection that is made. For example, a field for license plate information may change from optional to required (with an asterisk) if a vehicle type that requires a license plate is selected.

2. In the **Crew** section, complete the information for the new driver:

   ![Crew Section](image)

   a. In the **First Name** * field, type the *first name*.

   b. In the **Last Name** * field, type the *last name*.

   c. If appropriate, in the **Middle Name** field, type the *middle name*.

   d. If appropriate, in the **Suffix** field, type a *suffix* for the name or select one from the drop-down menu.

   e. In the **Date of Birth** * field, type the *birth date* in MM/DD/YYYY format or select the date from the calendar.

   f. In the **Country of Citizenship** * field, type the *country of citizenship* and select it from the menu of options that displays as you type.

   g. Select the **Male** or **Female** radio button to indicate *Gender*.

3. In the **Documents** section, add **Documents** associated with the new driver:

   ![Documents Section](image)
a. Select the **Document Type** * drop-down menu and select a document type.

**NOTE:** Western Hemisphere Travel Initiative (WHTI) documentation is not required when using an Enhanced Driver’s License since it provides the mandatory information.

d. If appropriate, in the **State/Province** * field, type the *state or province of the document* and select it from the menu of options that displays as you type.

e. As needed, select the **Add New Document** button to add additional documents.

**NOTE:** Select the **Delete** icon next to a document entry to delete the entry.

4. Optionally, in the **Nickname** field, type a nickname for the new driver.

5. Select the **Add** button to add the new driver.

**SAVED CREW CARDS**

Each saved driver has a **Crew Card** that includes nickname, first and last name, and document information. The **Crew Card** provides options for editing or deleting a driver saved to the account.

![Saved Crew Cards](image)

**Figure 5: Saved Crew Cards**
EDIT A DRIVER

1. Search and locate the driver.

2. On the Crew Card, select the Edit icon.

   "THEO DENNISTOUN"
   THEO DENNISTOUN
   Passport
   #6004823605

   **TIP:** If in the table view, the Edit icon is located at the end of the row with the driver name.

3. In the Edit Crew pane, update the driver information fields, as appropriate.
4. In the **Documents** section, update the document information, fields as appropriate.

![Documents section](image)

5. If needed, select the **Add New Document** button to add new documents.

6. If applicable, update the **Nickname** field.

7. Select the **Update** button.

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**DELETE A DRIVER**

1. Search and locate the driver.

2. On the **Crew Card**, select the **Delete** icon.

![Crew Card](image)

**TIP:** If in the table view, the **Delete** icon is located at the end of the row with the driver name.

![Table with driver](image)

The successfully processed message displays.

![Successfully processed message](image)
**TOPIC 3: MAINTAIN VEHICLES**

The Vehicles page displays information on conveyances and equipment currently associated with the carrier account. This topic presents the functionality to add new vehicles to the account. It also covers how to edit or delete current conveyances and equipment associated with the account.

The Vehicles page is divided into the following sections:

- **Create** button
- **Search Saved Conveyances** filter and **Conveyance Cards**
- **Search Saved Equipment** filter and **Equipment Cards**

The Conveyance and Equipment Cards provide license plate, Vehicle Identification Numbers (VIN), insurance, seal, and other details related to conveyances and equipment.

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**Figure 6: Vehicles Subtab**

The Table view icon displays the vehicles information in the Table View format. The Conveyance and Equipment tabs at the top toggle between the conveyances table and equipment table.

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**Figure 7: Vehicles – Table View**
SEARCH FILTERS

The Conveyances and Equipment Search Filters allow searching for conveyances and equipment associated with the account.

USE THE SEARCH FILTER

1. Select the Search Saved Conveyances or the Search Saved Equipment field.
2. Type the number or characters for the search. As you type, the Conveyance or Equipment Card(s) matching the entered search data display.

CREATE BUTTON

The Vehicles page Create button displays the Add Vehicles pane. Completing the information in this pane allows users to add conveyances and equipment to the account.

ADD A CONVEYANCE

1. At the top of the Vehicles page, select the Create button. The Add Vehicles pane displays.
2. Select the Conveyance radio button as the Part of Vehicle * option.

3. Complete the conveyance details.
   a. In the Conveyance Type * drop-down menu, select the conveyance type.
   b. In the Conveyance Number field, type the number.
   c. In the VIN * field, type the VIN number.
   d. Optionally, in the DOT Number field, type the DOT number.
   e. Optionally, in the Transponder ID field, type the Transponder ID number.

4. Complete 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 name and select it from the menu that displays as you type.
   c. In the State/Province * field, type the state or province and select it from the menu that displays as you type.
   d. As needed, select the Add New License Plate button to add additional license plates.

   **NOTE:** Select the Delete icon next to a license plate entry to delete the entry.

5. Complete the Insurance section.

   **NOTE:** When adding a conveyance, insurance information is required if carrying HAZMAT.
   a. In the Company Name * field, type the company name.
   b. In the Policy Number * field, type the policy number.
   c. In the Liability Amount * field, type the liability amount.
   d. In the Policy Year * field, type the four digit year.

6. Select the Add button to save and add the conveyance.
ADD EQUIPMENT

1. At the top of the Vehicles page, select the Create button. The Add Vehicles pane displays.

   ![Add Vehicles pane](image)

   - **Part of Vehicle**: Select Equipment.
   - **Equipment Type**: Select the equipment type.
   - **Equipment Number**: Type the equipment number.
   - **License Plates section**: Complete the license plates section.

   ![License Plates section](image)

   - **License Plate Number**: Type the license plate number.
   - **Country of Registration**: Type the country name and select it from the menu.
   - **State/Province**: Type the state or province and select it from the menu.
   - **Add New License Plate**: As needed, select the Add New License Plate button to add additional license plates.

   **NOTE**: Select the Delete icon next to a license plate entry to delete the entry.

2. Select the Equipment radio button as the Part of Vehicle * option.

   **NOTE**: The required sections of information are based on the Equipment Type option that is selected. For example, if the selected equipment type requires a license plate, then the License Plates section must be completed.

3. Complete the equipment details.
   a. In the Equipment Type * drop-down menu, select the equipment type.
   b. In the Equipment Number * field, type the equipment number.

4. Complete 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 name and select it from the menu that displays as you type.
   c. In the State/Province * field, type the state or province and select it from the menu that displays as you type.
   d. As needed, select the Add New License Plate button to add additional license plates.

5. Select the Add button to save and add the equipment.
**SAVED VEHICLE CARDS**

**Vehicle Cards** provide options for editing or deleting conveyances and equipment saved to a carrier account.

![Saved Conveyance Cards](image)

**EDIT CONVEYANCES OR EQUIPMENT**

1. Search and locate the conveyance or equipment.

2. On the **Conveyance or Equipment Card**, select the **Edit** icon.

   ![Edit Icon](image)

   **TIP:** If in the table view, the **Edit** icon is located at the end of the row with the conveyance or equipment name.

3. In the **Edit Vehicles** pane for the conveyance or equipment, update the information fields for each section as appropriate.

   ![Edit Vehicles](image)

4. Select the **Update** button.
DELETE A CONVEYANCE OR EQUIPMENT

1. On the Conveyance or Equipment Card, select the Delete icon.

TIP: If in the table view, the Delete icon is located at the end of the row with the conveyance or equipment name.

<table>
<thead>
<tr>
<th>Conveyances Type</th>
<th>Conveyances Number</th>
<th>Plate</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRACTOR</td>
<td>#GUESBRO765</td>
<td>GU - BRO765</td>
</tr>
<tr>
<td>ARMOURED TRUCK</td>
<td>#00000000000000001</td>
<td>WV - ABC123</td>
</tr>
</tbody>
</table>

2. Select Yes to confirm the delete.

A confirmation message displays to indicate the card was deleted.
**TOPIC 4: MAINTAIN COMMERCIAL PARTIES**

This topic presents the functionality to add, edit, and delete commercial parties for an account.

The **Account** tab, **Commercial Parties** page is divided into the following sections:

- Create button
- Search Saved Shippers filter and Shippers Cards
- Search Saved Consignees filter and Consignees Cards

**Commercial Parties Cards** provide the name and address information for shippers and consignees associated with the account.

![Figure 9: Commercial Parties Subtab](image)

The **Table View** icon displays the commercial parties information in the **Table View** format. The **Shippers** and **Consignee** tabs at the top toggle between the shippers table and consignees table.

![Figure 10: Commercial Parties – Table View](image)
SEARCH FILTER

The Shippers and Consignees Search Filters allow searching for shippers or consignees associated with the account.

USE THE SEARCH FILTER

1. Select the Search Saved Shippers or the Search Saved Consignees field.
2. Type the number or characters for the search. As you type, the Account Shipper or Consignee Card(s) matching the entered search data displays.

CREATE BUTTON

The Commercial Parties page Create button displays the Add Commercial Parties pane.

ADD A SHIPPER OR CONSIGNEE

1. Select the Commercial Parties page Create button. The Add Commercial Parties pane displays.
2. Select the Shipper or Consignee radio button for Type of Party *.
3. In the Company Name * field, type the company name.
4. In the Street * field, type the street address.
5. Optionally, in the Apartment, Suite, Unit field, type a number.
6. In the City * field, type the city name.
7. In the **Country** * field, type the *country name* and select it from the menu that displays as you type.

8. In the **State/Province** * field, type the *state or province name* and select it from the menu that displays as you type.

9. In the **Zip Code (US)** * field, type the *zip code*.

10. In the **Email Address** field, type the *email*.

11. Optionally, in the **Phone Number** field, type a *number*.

12. Select the **Add** button to save and add the shipper or consignee.

**SAVED COMMERCIAL PARTIES CARDS**

The saved **Commercial Parties Cards** provide options to edit or delete shippers and consignees.

**EDIT A SHIPPER OR CONSIGNEE**

1. Search and locate the shipper or consignee.

2. On the **Shipper** or **Consignee** Card, select the **Edit** icon.

   ![Edit Icon Example]

   **TIP:** If in the table view, the **Edit** icon is located at the end of the row with the shipper or consignee name.
3. In the **Edit Commercial Parties** pane, update the shipper or consignee fields as appropriate.

![Edit Commercial Parties Pane](image)

<table>
<thead>
<tr>
<th>Type of Party*</th>
<th>Company Name*</th>
<th>Street*</th>
<th>City*</th>
<th>Country*</th>
<th>State / Province*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipper</td>
<td>Shufflester</td>
<td>67131 Fairfield Point</td>
<td>Austin</td>
<td>US - UNITED STATES</td>
<td>TX - Texas</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**TIP:** If in the table view, the **Delete** icon is located at the end of the row with the shipper or consignee name.

![Delete Icon](image)

4. Select the **Update** button.

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**DELETE A SHIPPER OR CONSIGNEE**

1. On the **Shipper or Consignee Card**, select the **Delete** icon.

![Delete Icon on Card](image)

**TIP:** If in the table view, the **Delete** icon is located at the end of the row with the shipper or consignee name.

![Delete Icon in Table View](image)

2. Select **Yes** to confirm the delete.

A confirmation message displays to indicate the card was deleted.