ACE Truck e-Manifest - Trade

Maintain Account Data

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 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.
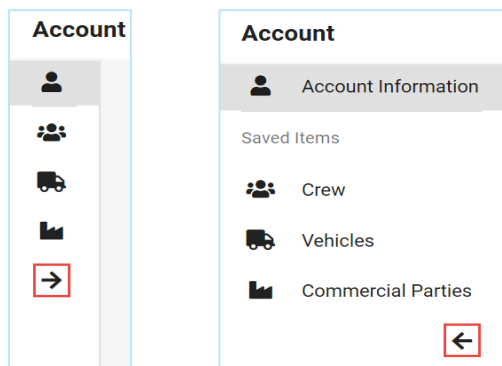

Figure 1: Expand and Contract Subtabs

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.
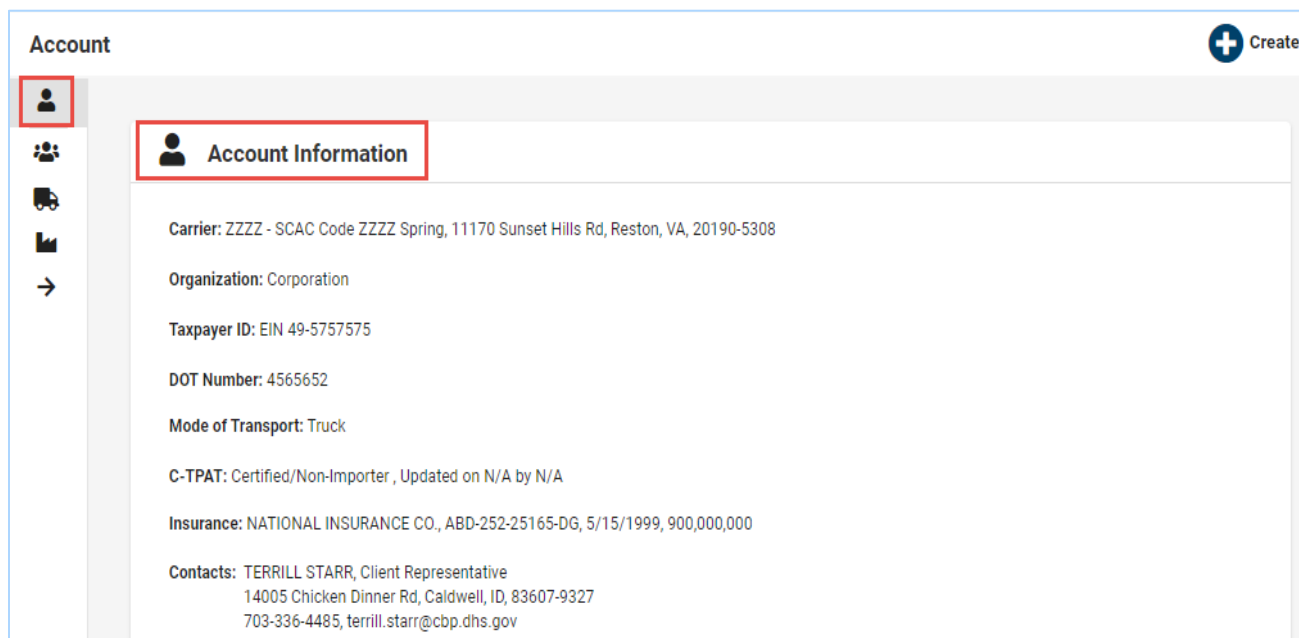

Figure 2: Account Tab – Account Information Subtab

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 SUBTABS

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.
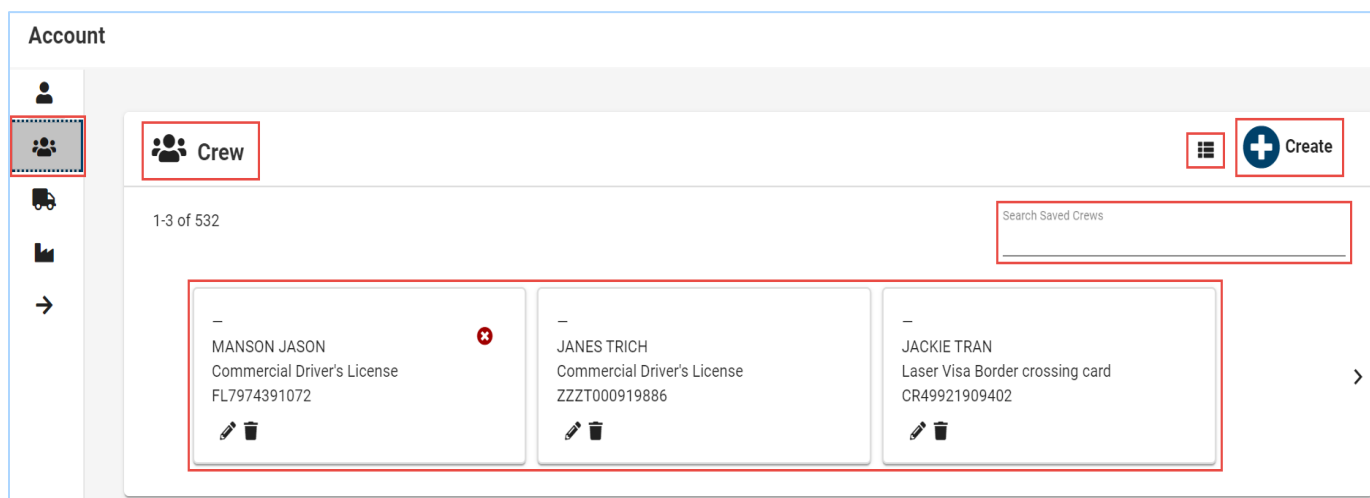
TOPIC 2: MAINTAIN CREW

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

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.

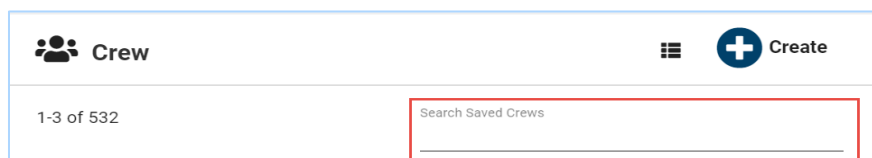| Nickname	First Name	Last Name	Crew Type	Document Type	Document ID			
–	MANSON	JASON	Crew	Commercial Driver's License	FL7974391072	✕	✏	🗑
–	JANES	TRICH	Crew	Commercial Driver's License	ZZZT000919886		✏	🗑
–	JACKIE	TRAN	Crew	Laser Visa Border crossing card	CR49921909402		✏	🗑
–	SUGGERMOT	FLEX	Crew	Commercial Driver's License	ZZZT000919172		✏	🗑
–	SMITHHH	JOHNNNN	Crew	Commercial Driver's License	68798809		✏	🗑

Figure 4: Crew - Table View

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.

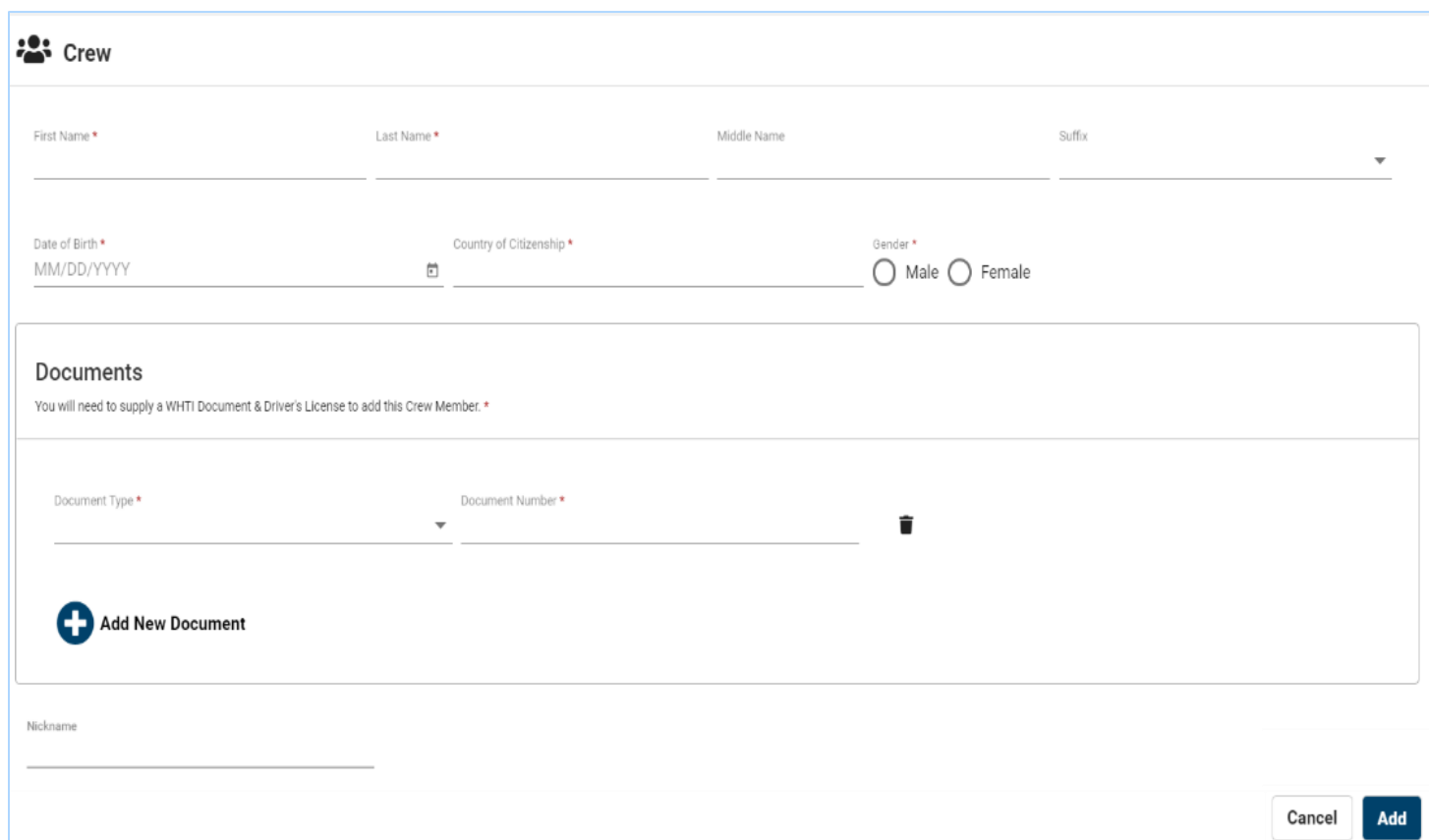### USE THE SEARCH FILTER

1. To search:

   a. Select the **Searched Saved Crews** field.

   b. 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:

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:

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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.

b. In the **Document Number** * field, type the *document number*.

c. If appropriate, in the **Country** * field, type the *country of the document* and select it from the menu of options that displays as you type.

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.
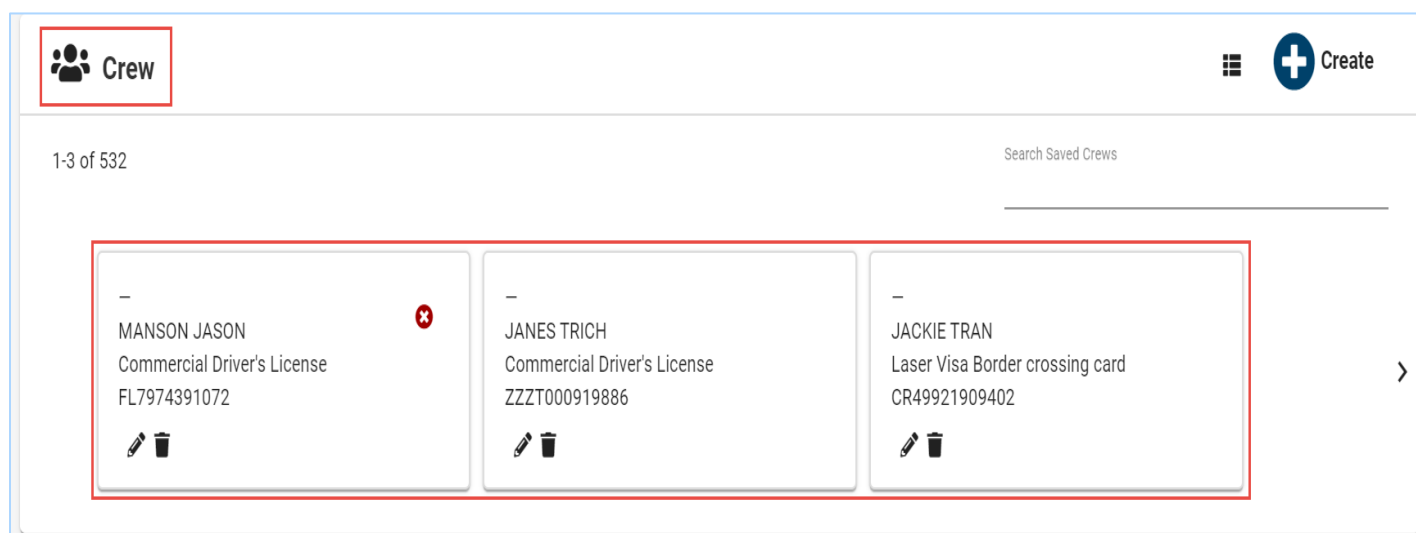
Figure 5: Saved Crew Cards

EDIT A DRIVER

1. Search and locate the driver.

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

   "THEO DENNISTOUN"
   THEO DENNISTOUN
   Passport
   #6004823805

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

Crew								
606 of 606					Search Saved Crews			
Nickname	First Name	Last Name	Crew Type	Document Type	Document ID			
–	MANSON	JASON	Crew	Commercial Driver's License	FL7974391072	❌	✏️	🗑️
–	JANES	TRICH	Crew	Commercial Driver's License	ZZZT000919886		✏️	🗑️

3. In the **Edit Crew** pane, update the driver information fields, as appropriate.

👥 Crew

First Name *	Last Name *	Middle Name	Suffix
Theo	Dennistoun		II

Date of Birth *   Country of Citizenship *   Gender *
MM/DD/YYYY   US - UNITED STATES   ○ Male ● Female

4. In the **Documents** section, update the document information, fields as appropriate.

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.

DELETE A DRIVER

1. Search and locate the driver.
2. On the **Crew Card**, select the **Delete** icon.

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

The successfully processed message displays.

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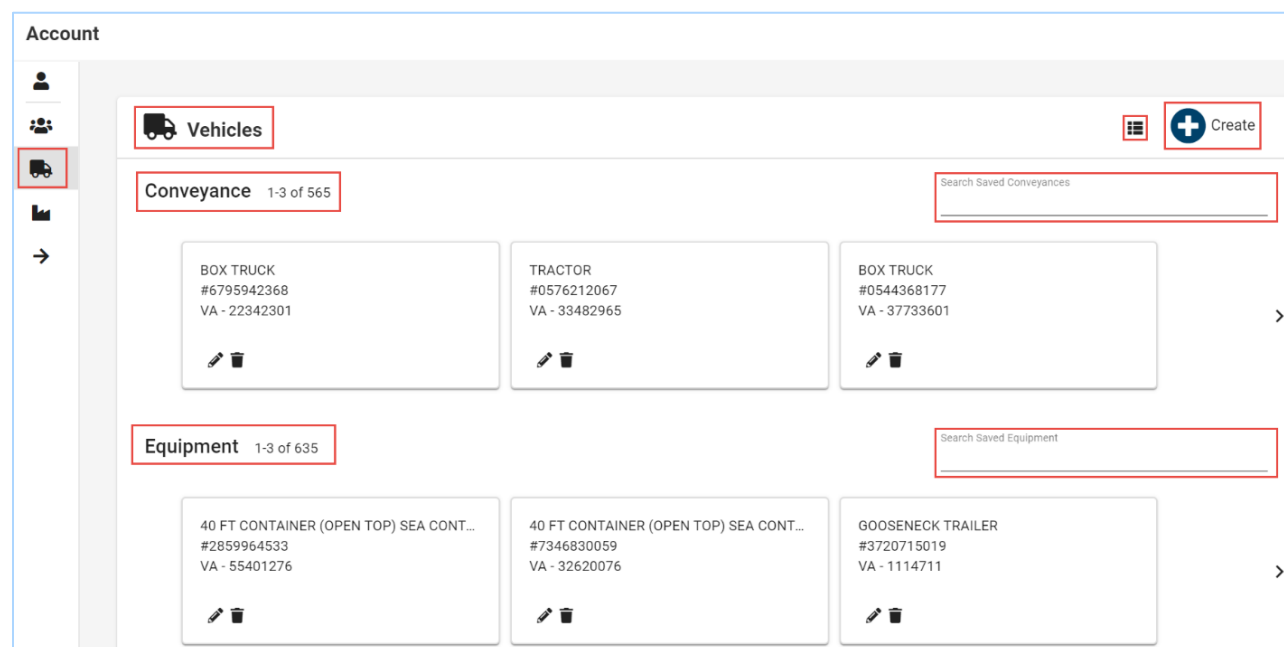
TOPIC 3: MAINTAIN VEHICLES

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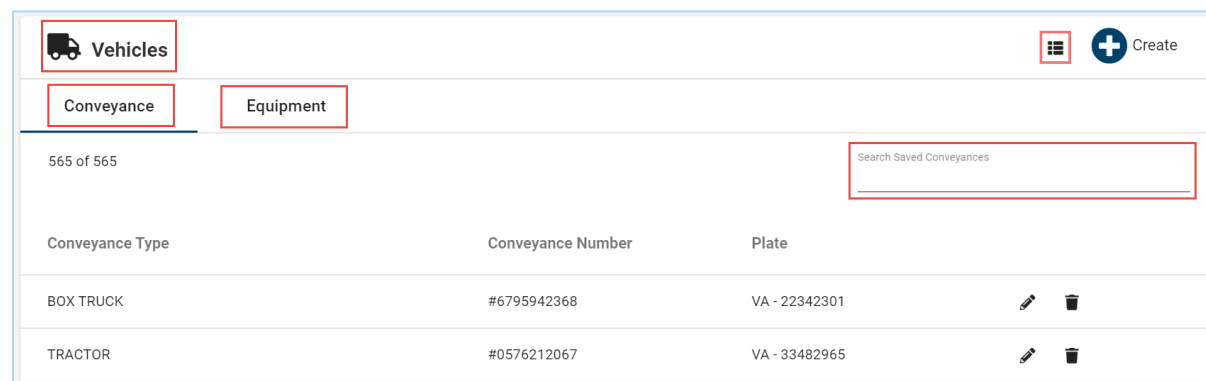
The **Conveyance** and **Equipment Cards** provide license plate, Vehicle Identification Numbers (VIN), insurance, seal, and other details related to conveyances and equipment.

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.

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.

🚚 Vehicles

Part of Vehicle *
◉ Conveyance ○ Equipment

Conveyance Type *
▼

Conveyance Number
Nick name for the Conveyance

VIN *

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

Cancel   Add

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.

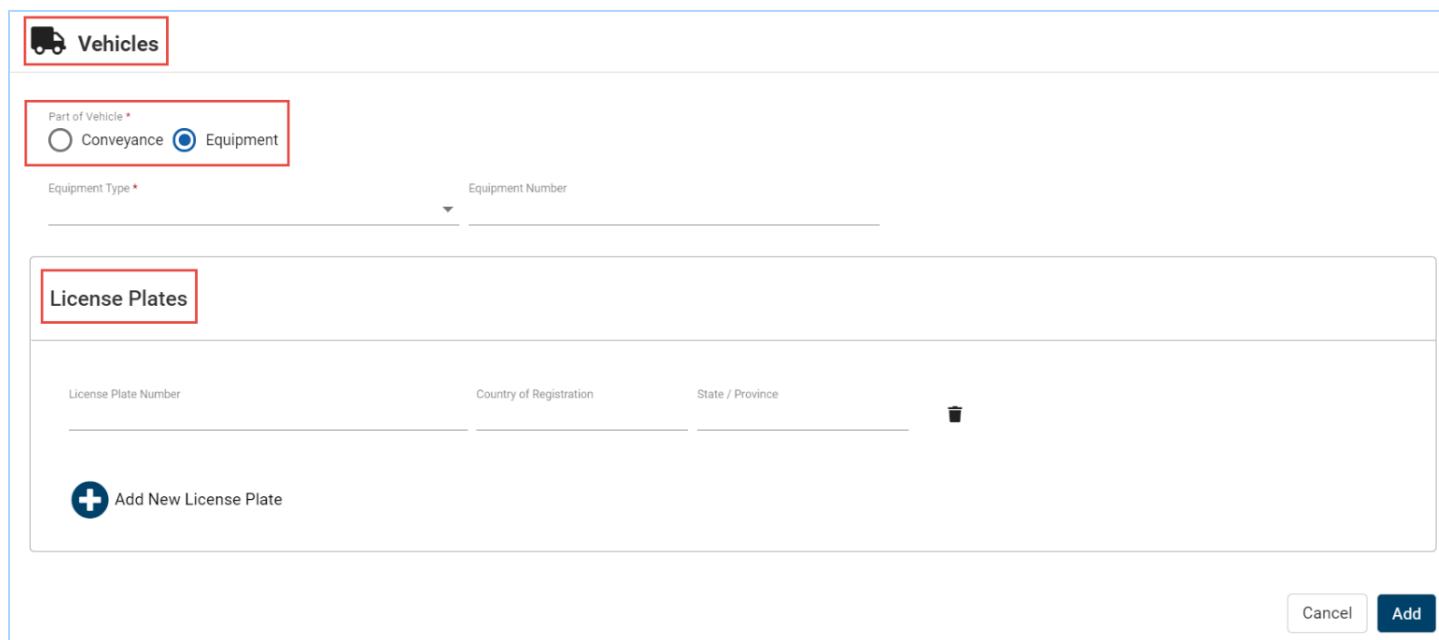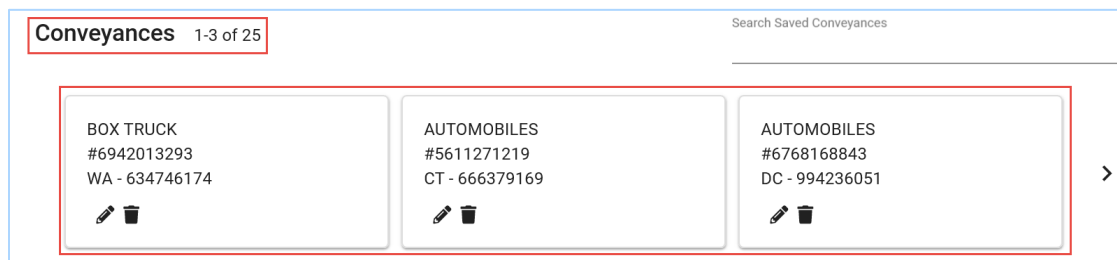5. Complete the **Insurance** section.

   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.

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.

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

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

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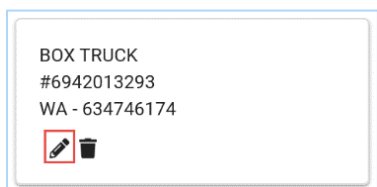
Vehicle Cards provide options for editing or deleting conveyances and equipment saved to a carrier account.

Figure 8: Saved Conveyance Cards
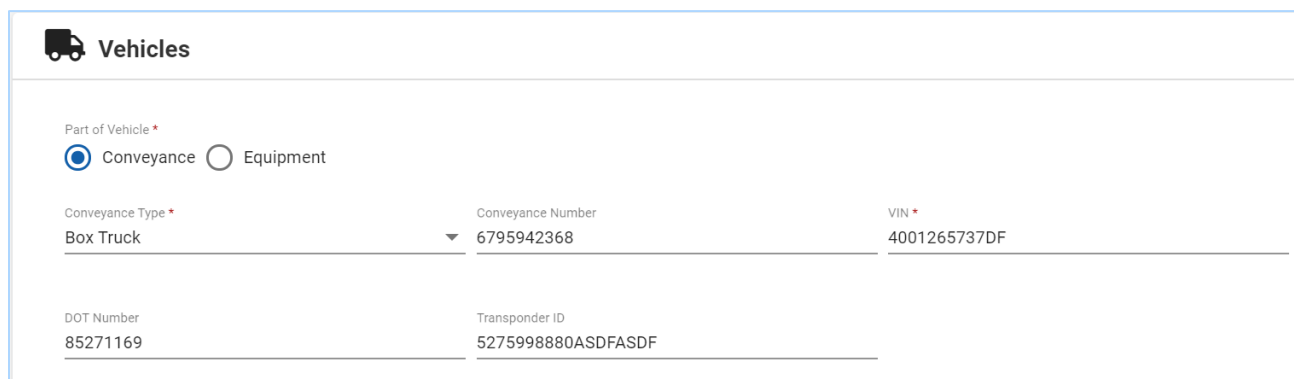
EDIT CONVEYANCES OR EQUIPMENT

1. Search and locate the conveyance or equipment.

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

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.

4. Select the **Update** button.

DELETE A CONVEYANCE OR EQUIPMENT

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

BOX TRUCK
#6942013293
WA - 634746174

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

Conveyances	Equipment					
			Search Saved			
conveyances Type		conveyances Number	Plate			
TRACTOR		#GUESBRO765	GU - BRO765	✓	✏	🗑
ARMORED TRUCK		#000000000000001	WV - ABC123	✓	✏	🗑

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.
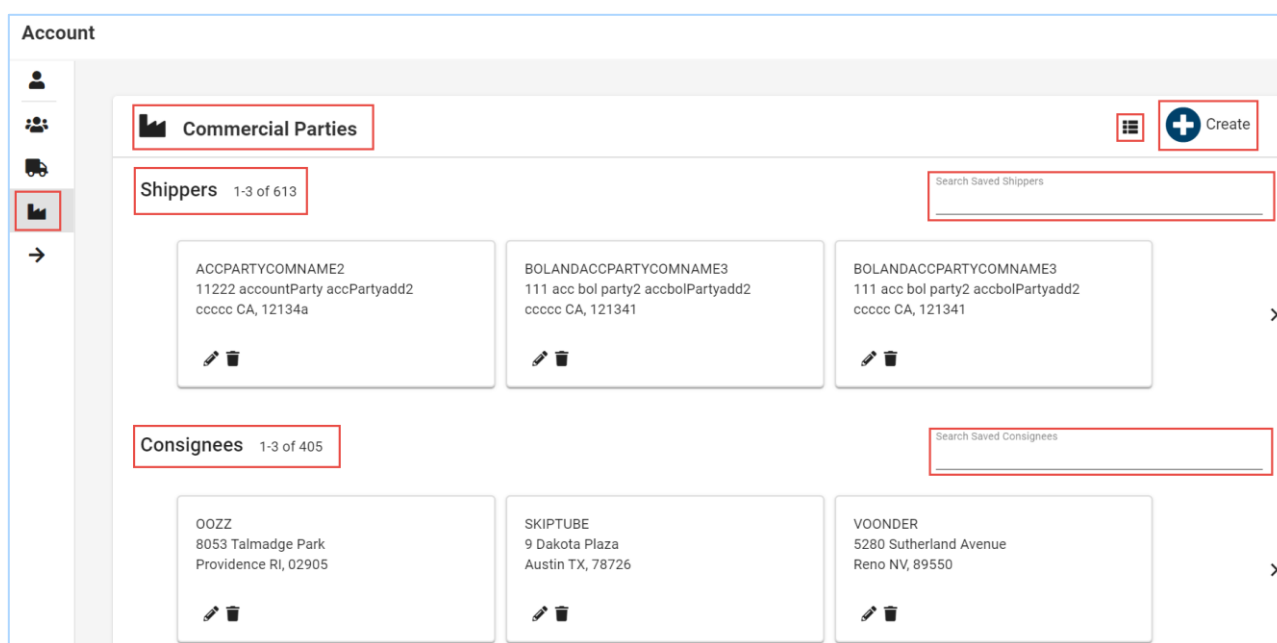
Figure 9: Commercial Parties Subtab

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

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*.
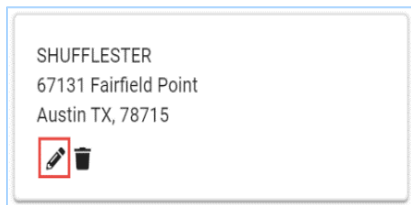
6. In the **City** * field, type the *city name*

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.

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

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3. In the **Edit Commercial Parties** pane, update the shipper or consignee fields as appropriate.

4. Select the **Update** button.

DELETE A SHIPPER OR CONSIGNEE

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

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

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

    A confirmation message displays to indicate the card was deleted.

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