DEVELOPMENT NOTICE

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

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**Topic 1: Introduction to the Truck Manifest Trade Portal**

This Quick Reference Guide (QRG) covers accessing and navigating the new **Truck Manifest Trade Portal**.

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.

**ACCESSING THE TRUCK MANIFEST TRADE PORTAL**

Users must have an account in the **ACE Secure Data Portal** to access the **Truck Manifest Trade Portal**. Truck carriers with a current account for the **ACE Secure Data Portal**, **ACE e-Manifest: Truck** system will automatically have access to the new ACE Truck e-Manifest application, **Truck Manifest Trade Portal**.

Users that are new to Truck e-Manifest processing need to request an **ACE Secure Data Portal** account to access the new **Truck Manifest Trade Portal**. Reference the following link for additional information on getting started with the **ACE Secure Data Portal**: [https://www.cbp.gov/trade/automated/getting-started/portal-introduction](https://www.cbp.gov/trade/automated/getting-started/portal-introduction).

**LOGIN**

Trade users will access the **Truck Manifest Trade Portal** by using the **References** tab after login to the **ACE Secure Data Portal**. Users will not need to enter their user ID and password twice. The login data from the **ACE Secure Data Portal** applies automatically and the **Truck Manifest Trade Portal** displays without a Login screen.

**Log in to Truck Manifest Trade Portal Using the References Tab**


   The **ACE Secure Data Portal** displays.

2. Select the **References** tab at the top.

3. In the **Links** section on the right, select the **Launch Truck Manifest Trade Portal** button.

   The **Truck Manifest Trade Portal** displays.
TRUCK MANIFEST TRADE PORTAL

The Truck Manifest Trade Portal allows easy access to creating a manifest, creating a bill of lading, and adding account data, such as drivers, conveyances, equipment, shippers, and consignees.

This functionality is covered in greater detail in the other quick reference guides (QRGs) in the ACE Truck e-Manifest – Trade series:

- Create a Manifest QRG
- Create a Bill of Lading QRG
- Maintain Account Data QRG.

Figure 1: Truck Manifest Trade Portal

A Title Bar and four main tabs (Dashboard, Manifest, Bill of Lading, and Account) display at the top. These appear on all screens of the application for easy access to the Truck Manifest functionality. Also, a Create button displays at the top of each main tab.
Figure 2: Title Bar, Main Tabs, and Create Button

**Title Bar**

The **Title Bar** includes the **User Menu**, located in the upper right corner, which shows the **User Name** and **SCAC Code** for the account user. This menu contains two options:

- **Change Carrier Account** – displays if user has multiple carrier accounts; allows changing to a different carrier account, but not a different user.
- **Logout** – logs the user out of the application.

**Change Carrier Account Menu**

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.

Figure 3: Change Carrier Account Menu and New Carrier Name

**NOTE:** To change to another account user, the user has to logout and then log in as the other user.

**Main Tabs**

Four main tabs:

- **Dashboard** – displays the number of crew, commercial parties, and vehicles that have been added to the carrier account; and reminder, informational, and warning notification messages.

- **Manifest** – displays the **Manifest List** page with a list of the saved as draft and submitted manifests for the carrier and allows entering search criteria to narrow the list to specific manifests, as well as editing the listed manifests or creating new ones.
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- **Bill of Lading** – displays the **Bill of Lading List** page with a list of the saved as draft and manifested BOLs for the carrier and allows entering search criteria for specific BOLs, as well as editing the listed BOLs or creating new ones.

- **Account** – displays the **Account** page that allows searching for and adding, editing, and deleting crew, vehicles, and commercial parties to the carrier account.

Each of the four main tabs are covered in greater detail in the topics that follow.

**CREATE BUTTON AND MENU**

The **Create** button displays the **Create** drop-down menu with five options:

- **Manifest** – displays the **Create Manifest** page and the manifest header information. Refer to the **Create Manifest Quick Reference Guide** (QRG) for further details.

- **Bill of Lading** – displays the **Create BOL** page and the BOL header information. Refer to the **Create Bill of Lading QRG** for further details.

- **Crew** – displays the **Account - Crew** page to add driver and documents information. Refer to the **Maintain Account Data QRG** for further details.

- **Vehicles** – displays the **Account - Vehicles** page to add conveyance, equipment, insurance, license plate, and seal information, if applicable. Refer to the **Maintain Account Data QRG** for further details.

- **Commercial Parties** – displays the **Account - Commercial Parties** page to add shipper or consignee information. Refer to the **Maintain Account Data QRG** for further details.

**Figure 4: Create Button and Menu**
**Topic 2: Dashboard Tab**

This topic presents the **Dashboard** tab. The **Dashboard** tab includes a quick summary of truck manifest and BOL information specific to the carrier account. This includes information such as notification messages and the number of crew, vehicles, and commercial parties associated with the account; as well as quick access to truck manifest functionality such as creating a manifest and BOL and adding crew, vehicles, and commercial parties to the account.

The **Dashboard** tab is divided into the following sections:

- **Create** button (reference [Topic 1](#))
- **Account** buttons
- **Notifications**
- **Manifest Status** (future functionality)
- **Bill of Lading Status** (future functionality)

![Dashboard Tab](image)

**Figure 5: Dashboard Tab**
ACCOUNT BUTTONS

The Account buttons correspond to the crew, vehicles, and commercial parties saved to the account. The number on the button indicates how many of each type are currently saved to the carrier account. Selecting the button displays the Account tab and the Crew, Vehicles, or Commercial Parties subtab page. Reference the Account Tab topic for more details.

Figure 6: Account Buttons

NOTIFICATIONS SECTION – FUTURE FUNCTIONALITY

NOTE: Initially, the Notifications section will display static messages helpful to the new deployment, such as where to find training materials and a contact email for questions and feedback.

The Notifications section lists notification messages such as information about manifests, bills of lading, or updates to the system.

There are three types of messages:

- **Reminders** – A reminder message may provide a reminder of actions to complete, such as a manifest saved as a draft without a crewmember or vehicle added.
- **Information** – An information message may indicate information about the manifest or BOL such as a manifest has arrived.
- **Warnings** – A warning message may provide a caution about a manifest or bill of lading such as a manifest arrival without a BOL link.

Three oval buttons display in the upper right of the Notifications section representing the three different message types and include a number of the count of each. In a future release, selecting a button limits the display of the notification messages to only that particular message type.

Once a notification message has been reviewed or processed, the Dismiss hyperlink to the right removes it from the Notifications list.

Figure 7: Notifications Section
**MANIFEST STATUS SECTION – FUTURE FUNCTIONALITY**

NOTE: The **Manifest Status** section is future functionality and is subject to change. At this time, the graphical data may be inaccurate so this functionality is deactivated until data issues are resolved. Stay tuned for a future release.

The **Manifest Status** section displays a visual summary of the activity statuses of the manifests within the last 30 days. Hovering over a piece of the visual chart displays the actual count of manifests at that status.

In the upper right corner of the **Manifest Status** section is a **Templates** button. The number on the button indicates how many manifest templates have been added to the carrier account. Selecting the button displays the **Account** tab and the **Manifest** subtab page with the manifest templates details. Reference the **Account Tab** topic for more details.

![Figure 8: Manifest Status Section (future functionality)](image)

**BILL OF LADING STATUS SECTION – FUTURE FUNCTIONALITY**

NOTE: The **Bill of Lading Status** section is future functionality and is subject to change. At this time, the graphical data may be inaccurate so this functionality is deactivated until data issues are resolved. Stay tuned for a future release.

The **Bill of Lading Status** section displays a visual summary of the filing statuses of the bills of lading and the statuses of the entries for those BOLs within the last 30 days. Hovering over a piece of the visual chart displays the actual count of BOLs manifested or not, or the number of entries at different statuses.

In the upper right corner of the **Bill of Lading Status** section is a **Templates** button. The number on the button indicates how many bill of lading templates have been added to the carrier account. Selecting the button displays the **Account** tab and the **Bill of Lading** subtab page with the BOL templates details. Reference the **Account Tab** topic for more details.
Figure 9: Bill of Lading Status Section (future functionality)
**Topic 3: Manifest Tab**

This topic presents the Manifest tab. The Manifest tab displays the Manifests page which displays a list of draft and submitted manifests by default associated with the carrier account and the status of each. Also, by default, the arrival dates prefill with dates 30 days in the past and 30 days in the future. If the manifest is not arrived, the estimated arrival dates are used instead.

The Manifest List page is divided into the following sections:

- Create button (reference Topic 1)
- Search filter
- Sort By options
- Manifest list results

![Manifest Tab](image)

**Figure 10: Manifest Tab**

The steps that follow explain how to navigate the Manifest tab and the functionality available, such as search for particular manifests, set the format of the display of manifests; or edit, print, and cancel a manifest.
NAVIGATE MANIFEST TAB

1. At the top of the Truck Manifest Trade Portal, select the Manifest tab.

   The Manifest List page displays a list of draft and submitted manifests for the carrier. Each manifest displays related information and a status bar with status information.

   ![Manifest List Example]

2. In the Search section at the top of the Manifest tab:

   - In the Search Manifest Number field, type a full or partial manifest number. Or select a manifest number from the drop-down menu (future functionality).

     **NOTE:** The search manifest number field requires the SCAC code and at least 2 characters or numbers.

   - Notice the Arrival Start Date and Arrival End Date fields default to 30 days in the past and 30 days in the future. Adjust the dates if necessary.

     **NOTE:** If the manifest is not arrived, the Estimated Arrival Start Date and Estimated Arrival End Date are used instead.

   - Select the Search button.

     The specific manifest information matching the search criteria displays in the Results section.
d. In the **Search Manifest Number** field, select the X to clear the specific manifest number to begin a new search (future functionality).

![Search Manifest Number](image)

e. Select the **Status** drop-down menu and select a status.

![Status](image)

f. Select the **Search** button.

The **Results** section displays only manifests with that status for the specific arrival period.

g. To the left of the **Search** button, select the **Clear** button.

The contents of all search fields are deleted.

h. Select the **Arrival Port** field and type the *port code* or select a port code from the drop-down menu.

**NOTE:** As you type the digits of the port code, a list of corresponding ports displays in a drop-down menu.

![Arrival Port](image)

i. In the **Arrival Start Date** and **Arrival End Date** fields, type *dates* or select the calendar and choose dates. The estimated dates are used for manifests that are not arrived.

j. Select the **Search** button.

The **Results** section displays only manifests for the specific arrival port and arrival dates.
3. To the right of the Results section title bar:

a. Review the Sort By buttons. The Arrival Date button is selected by default. Review the Results section currently displays manifests in ascending order by arrival date or estimated arrival date.

b. Select the Manifest Number button.

   The Results section now displays manifests in ascending order by manifest number.

   **NOTE:** Once selected, the Descending icon toggles to the Ascending icon.

c. Select the Descending icon.

   The Results section now displays manifests in descending order by manifest number.

   **NOTE:** Once selected, the Descending icon toggles to the Ascending icon.

   

d. Select the Table view icon.

   The Results section now displays manifests in a table format list without the status bars and with column headings.

   ![Table view example]

   The column headings allow sorting the manifests in ascending or descending order based upon the specific column selected. An up arrow or down arrow displays once the column heading is hovered over or selected.

   **NOTE:** Once selected, the Table view icon toggles to the Status bar view icon.


e. Select the Status bar view icon to display the status bar format once again and toggle the icon back to Table view.

4. In the Results section manifest list, in the first manifest record:

a. Select the Manifest Number hyperlink.

   The Edit Manifest page displays, in the Review step, for the selected manifest.
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i. Select the **Close** button to close the **Edit Manifest** page.
   The confirmation dialog box displays.

ii. Select the **Yes** button to close the dialog box and return to the **Manifest** tab.

b. At the top right corner, select the **History** icon (future functionality).
   Timestamps and all activity that has occurred for the manifest displays instead of the status bar format.

   ![Manifest Example]

   **NOTE:** Select the **History** icon again to redisplay the status bar format for the manifest list.

c. To the right of the **History** icon, select the **Actions** icon.
   The **Actions** drop-down menu displays to allow selecting the **Edit Manifest/Amend Manifest, Cancel Manifest**, or **Print Manifest** options.

d. To revise the manifest, select the **Edit Manifest/Amend Manifest** option.
   For draft manifests, the **Edit Manifest** page displays to edit the saved information.
   For submitted manifests, the **Amend Manifest** dialog box displays first to select a reason for amending the submitted manifest and then the **Edit Manifest** page displays to edit the submitted information.

   **NOTE:** The **Edit Manifest** option appears pre-CBP submission with the manifest in draft status. The **Amend Manifest** option appears post-CBP submission with the manifest in submitted status.

e. To cancel the manifest, select the **Cancel Manifest** option.
   The **Cancel Manifest** dialog box displays to confirm the cancel. Two cancel selections are available: cancel the manifest only or cancel the manifest and its bills. A no selection allows exiting without cancelling.

f. To print the manifest, select the **Print Manifest** option.
   The **Print Manifest** dialog box displays. Two print selections are available: print the manifest information or the coversheet. A cancel selection allows exiting without printing.
**Topic 4: Bill of Lading Tab**

This topic presents the **Bill of Lading** tab. The **Bill of Lading** tab displays the **Bill of Lading List** page which includes BOL information for bills of lading saved as draft or added to manifests in the last 30 days by default. Shipper and consignee names and a description of the cargo is also included. In addition, the status of the BOL and the manifest is shown.

The **Bill of Lading** tab is divided into the following sections:

- **Create** button (reference [Topic 1](#))
- **Search** filter
- **Sort By** options
- **BOL list results**

![Bill of Lading Tab](image)

**Figure 11: Bill of Lading Tab**

The steps that follow explain how to navigate the **Bill of Lading** tab and the functionality available, such as search for particular BOLs; set the format of the display of BOLs; or edit and print a BOL.
**NAVIGATE BILL OF LADING TAB**

1. At the top of the Truck Manifest Trade Portal, select the Bill of Lading tab.

   The Bill of Lading List page displays a list of BOLs for draft or submitted manifests for the carrier. Each bill of lading displays related information, shipper and consignee names, brief cargo description, and a status section with status information.

   ![Bill of Lading Example](image)

2. In the Search section at the top:

   a. In the **Search BOL Number** field, type a **full or partial BOL number**. Or select a BOL number from the drop-down menu (future functionality).

   ![Search BOL Number Example](image)

   **NOTE:** The search BOL number field requires the SCAC code and at least 2 characters or numbers.

   b. Notice the **Arrival Start Date** and **Arrival End Date** fields default to 30 days in the past and 30 days in the future. Adjust the dates if necessary.

   ![Arrival Date Example](image)

   **NOTE:** If the associated manifest is not arrived, the **Estimated Arrival Start Date** and **Estimated Arrival End Date** are used instead.

   c. Select the **Search** button.

   The specific bill of lading information matching the search criteria displays in the **Results** section.
d. To the left of the **Search** button, select the **Clear** button.
   The contents of all search fields are deleted.

e. In the **Arrival Start** and **Arrival End** date fields, type *dates* or select the calendar and choose dates. The estimated dates are used for associated manifests not arrived.

f. Select the **Arrival Port** field and type the *port code* or select a port code from the drop-down menu.

   **NOTE:** As you type the digits of the port code, a list of corresponding ports displays in a drop-down menu.

g. Select the **Search** button.
   The **Results** section displays only BOLs for the designated arrival port and arrival dates.

h. In the **Arrival Port** field, select the **X** to clear the specific port number to begin a new search.

i. Select the **Manifested Status** drop-down menu and select a status.

j. Select the **Search** button.
   The **Results** section displays only BOLs with that associated manifest status for the specific arrival period.
3. To the right of the **Results** section title bar:

![Image of Sort By buttons]

a. Review the **Sort By** buttons. The **Arrival Date** button is selected by default. Review the **Results** section currently displays BOLs in ascending order by arrival date or estimated arrival date.

b. Select the **BOL Number** button.

   The **Results** section now displays BOLs in ascending order by BOL number.

c. Select the **Descending** icon.

   The **Results** section now displays BOLs in descending order by BOL number.

   **NOTE:** Once selected, the **Descending** icon toggles to the **Ascending** icon 🔽.

d. Select the **Table view** icon.

   The **Results** section now displays BOLs in a table format list without the status bars and with column headings.

![Table view of BOLs]

The column headings allow sorting the BOLs in ascending or descending order based upon the specific column selected. An up arrow or down arrow displays once the column heading is moused over or selected.

   **NOTE:** Once selected, the **Table view** icon toggles to the **Status bar view** icon 📊.

e. Select the **Status bar view** icon to display the status bar format once again and toggle the icon back to **Table view**.

4. In the **Results** section BOL list, in the first BOL record:

a. Select the **BOL Number** hyperlink.

   The **Bill of Lading Review** page displays for the selected BOL.
i. Select the Close button to close the Bill of Lading Review page. The confirmation dialog box displays.

ii. Select the Yes button to close the dialog box.

b. At the top right corner, select the History icon (future functionality). Timestamps and all activity that has occurred for the bill of lading display instead of the status bar format.

**NOTE:** Select the History icon again to redisplay the status bar format for the BOL list.

c. To the right, select the Actions icon. The Actions drop-down menu displays to allow selecting the Edit BOL/Amend BOL or Cancel BOL options for the BOL.

d. To revise the BOL, select the Edit BOL/Amend BOL option. The Edit BOL page displays to allow editing the BOL information of the draft manifest.

The Amend BOL dialog box displays first to allow selecting a reason for amending the submitted BOL and then the Edit BOL page displays to edit the BOL of the submitted manifest.

**NOTE:** The Edit BOL option appears pre-CBP submission of the manifest in draft status. The Amend BOL option appears post-CBP submission of the manifest in submitted status.

e. To cancel the BOL, select the Cancel BOL option. The Cancel BOL dialog box displays to confirm the cancel. Two cancel selections are available: cancel the BOL only or cancel the BOL and the manifest. A no selection allows exiting without cancelling.
Topic 5: Account Tab

This topic presents the Account tab. The Account tab displays a brief summary of account profile information and listings of the different account data that have been added to the carrier account. The account information and account listings are organized in separate subtabs on the left.

Similar to other main tabs, the Create button displays at the top of the Account tab. Reference Topic 1 for Create button details. Additionally, each subtab also displays a Create button to create the manifest data directly, such as adding crew, vehicles, or commercial parties to the carrier account.

Reference the Maintain Account Data QRG for detailed information to add, edit, or delete account data.

The Account tab is divided into the following subtabs displayed on the left of the page:

- Account Information
- Crew
- Vehicles
- Commercial Parties

The following template subtabs may be included in a future release:

- Commodities (future functionality)
- Manifest (future functionality)
- Bill of Lading (future functionality)

Expand and Contract Subtabs

Select the Expand icon below the subtabs list on the left to expand the list to also display the related names beside the subtab image icons.

Select the Contract icon to contract the subtab list back to only display the subtab image icons.

Figure 12: Expand and Contract Subtabs
ACCOUNT INFORMATION SUBTAB

The **Account Information** subtab displays by default. It contains key information for the carrier account, such as **Carrier Name**, **Taxpayer ID**, **DOT Number**, and **Contacts** information. The account profile information displayed is transferred from the ACE Secure Data Portal account.

![Account Information Subtab](image)

**Figure 13: Account Tab – Account Information Subtab**


To view information for another account, reference **Topic 1** for **Change Carrier Account** menu details.

**NOTE:** Changes made to the account profile information in the ACE Secure Data Portal synchronize and display in the Truck Manifest Trade Portal.
Crew Subtab

The Crew subtab lists drivers that are currently associated with the carrier account. The driver information is displayed in the Crew Cards by default.

The Table view icon displays the driver information in the Table View format.

The Create button displays in the upper right corner of the Crew page and allows adding drivers to the carrier account.

The Search Saved Crews filter allows searching for particular drivers associated with the account.

The Forward icon can be used to view additional cards.

Figure 14: Crew Subtab – Crew Cards

<table>
<thead>
<tr>
<th>Nickname</th>
<th>First Name</th>
<th>Last Name</th>
<th>Crew Type</th>
<th>Document Type</th>
<th>Document ID</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JANES</td>
<td>TRICH</td>
<td>Crew</td>
<td>Commercial Driver's License</td>
<td>ZZZT000919886</td>
</tr>
<tr>
<td></td>
<td>SUGGERMOT</td>
<td>FLEX</td>
<td>Crew</td>
<td>Commercial Driver's License</td>
<td>ZZZT000919172</td>
</tr>
<tr>
<td></td>
<td>BETTY</td>
<td>W</td>
<td>Crew</td>
<td>Commercial Driver's License</td>
<td>OH432433</td>
</tr>
</tbody>
</table>

Figure 15: Crew Subtab – Table View

NOTE: Adding FAST ID drivers is completed during the Create Manifest process and only includes a nickname and FAST ID number in the driver details. Reference the Create Manifest QRG for more details.
The **Edit** icon 🖊️ and **Delete** icon ❌ displayed in the lower left corner of the **Crew Card** or far right columns of the **Table View** allow editing or deleting a specific driver.

![Crew Card](image)

**Figure 16: Crew Card**

Reference the **Maintain Account Data QRG** for detailed information to add, edit, or delete drivers.

**VEHICLES SUBTAB**

The **Vehicles** subtab lists conveyances and equipment currently associated with the carrier account. Conveyance information is displayed in the **Conveyance Cards** and equipment information is displayed in the **Equipment Cards** by default.

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.

The **Create** button in the upper right corner allows adding conveyances and equipment to the carrier account.

The **Search Saved Conveyances** and **Search Saved Equipment** filters allow searching for particular conveyances and equipment associated with the account.

The **Forward** icon ➔ can be used to view additional cards.

![Vehicles Subtab](image)

**Figure 17: Vehicles Subtab – Conveyance and Equipment Cards**
The Edit icon  and Delete icon  displayed in the lower left corner of the Conveyance and Equipment Cards or far right columns of the Table View allow editing or deleting a specific conveyance or equipment.

Reference the Maintain Account Data QRG for details to add, edit, or delete conveyances and equipment.

**COMMERCIAL PARTIES SUBTAB**

The Commercial Parties subtab lists shippers and consignees associated with the carrier account. Shipper information is displayed in the Shipper Cards and consignee information is displayed in the Consignee Cards by default.

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

The Create button allows adding shippers and consignees to the carrier account.

The Search Saved Shippers and Search Saved Consignees filters allow searching for particular shippers and consignees associated with the account.

The Forward icon  can be used to view additional cards.
Figure 20: Commercial Parties Subtab – Shippers and Consignees Cards

<table>
<thead>
<tr>
<th>Shippers</th>
<th>Consignee</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Company Name</strong></td>
<td><strong>Address</strong></td>
</tr>
<tr>
<td>GSPA</td>
<td>1801 N Street</td>
</tr>
<tr>
<td>SHIPPER 1</td>
<td>123 MAIN STREET</td>
</tr>
<tr>
<td>CANADA EXPORT CO</td>
<td>10 DINGERWALLER DRIVE</td>
</tr>
</tbody>
</table>

Figure 21: Commercial Parties Subtab – Table View
The **Edit** icon and **Delete** icon displayed in the lower left corner of the **Shipper and Consignee Cards** or far right columns of the **Table View** allow editing or deleting a specific shipper or consignee.

**Figure 22: Shipper Card**

Reference the **Maintain Account Data QRG** for detailed information to add, edit, or delete shippers and consignees.