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Understanding Cross Account Access

Cross Account Access (CAA) is ACE functionality that allows users to access multiple ACE Portal accounts based on privileges granted by one or more Trade Account Owners (TAO). A TAO can grant and set up CAA for another company's TAO. Establishing CAA requires an invitation or request from a company's TAO that allows access to all or some of that company's Accounts. The recipient can accept or reject the request.

Granting Cross Account Access

When a TAO (the grantor) grants **Cross Account Access** CAA, he or she can give the user (that is, the recipient) permission to have access to the Top Account or to specific accounts under the Top Account. Whether or not access to the Top Account is given, the granting TAO can specify access permissions to each tab name, per account. This means that access restrictions can be set for each individual sub-account. The receiving TAO controls access permissions for their own users based on the privileges granted to them by the granting TAO.
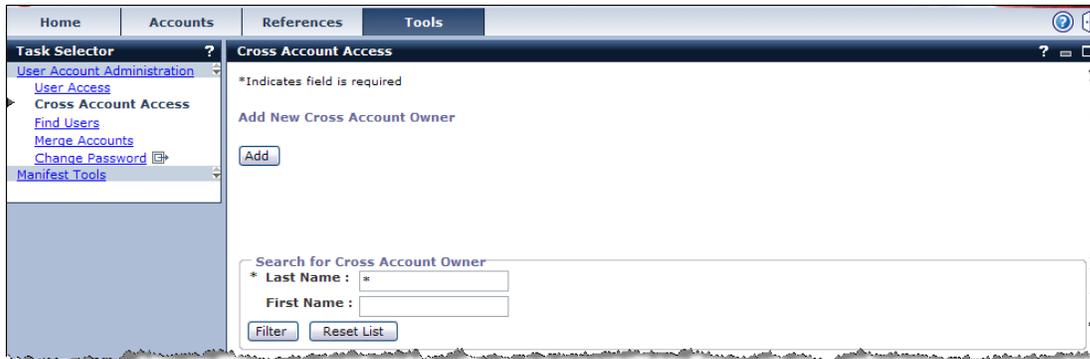
Only the Trade Account Owner (TAO) can grant CAA.

Before starting, make sure you are logged into the account to which you want to grant Cross Account Access.

To grant CAA, follow the steps below:

1. Select the **Tools** tab.

2. Select **Cross Account Access** found under "*User Account Administration.*"

3. The Cross Account Access portlet displays.

4. Select the **Add** button.

5. You must enter the ACE "*Existing User ID*" and the "*Top Account ACE ID*" for the recipient whose access you are granting.

All fields proceeded by an asterisk (*) within the ACE Secure Data Portal are required fields.

Both the grantor (the user granting CAA) and the recipient (the user receiving CAA) must be TAOs.

If you do not know the recipient TAO's ACE user ID and Top Account ACE ID, contact the TAO directly to get this information. If you do not have the TAO's contact information, contact your Account Manager/Account Administrator for assistance. This information is not available through the Portal.

6. Select the **Continue** button.

7. The Cross Account Access portlet displays and you must indicate if you are giving the TAO access to your Top Account by either selecting or not selecting the radio button.

8. Select the **Continue** button.

9. The Cross Account Access portlet displays and you can indicate which accounts are included in the Cross Account Access.

   - To provide read-only access to all accounts, select the **Read-Only Access for All** button.

   - To provide access to all accounts, select the **Full Access for All** button.
   - If you wish, you can edit the permissions to these accounts. To view the Importer of Record (IR) numbers to which you have granted access, select the

down scroll bar. Select the **Importer** sub-tab. You can now see the specific IR numbers as well as edit permissions.

10. Select the **Submit for Review** button. This will send a notification to the recipient TAO Task List. They can either accept or reject the offer.

11. You will get a confirmation that the CAA offer has been submitted. Select the **OK** button. You are back to the beginning of the CAA.

> *Go to your user list to view users that have accepted CAA. Users that have accepted will appear on the list. Users that have not yet taken an action or that have rejected the request will not appear. Users have 14 days to accept or reject a request before the request expires.*
>
> *To learn how to revoke a user's CAA, refer to the section titled "Revoking Cross Account Access."*

Accepting Requests for Cross Account Access

1. In your "*Task List*" is an "*Approvals*" request for CAA. You must first claim the item in order to display it. Select the check box next to the Cross Account Request on the "*Approvals*" sub-tab.

2. Select the **Claim** button.

3. The item is now a link. Select the **Cross Account Request** link.

4. The request opens and you can see the account that is extending access to you as well as the specific sub-accounts to which you are being given access. Select the down scroll bar to view fully.

5. At the bottom of the page there are three options: accept the request; reject the request (you must supply a comment) or keep it on the "*Task List*" for subsequent action. Select the **Accept** button.

6. You are back on the "*Home*" tab and the item is no longer on the "*Task List*." You now will have access to the granting company's accounts.

When a receiving TAO accepts CAA, he or she can then grant permission for his or her own users to have access to that account.

> *The next time you log into ACE, the account to which you have been granted CAA will appear in your list of accounts. To view this account's information, select it as you would any other account.*

For more information on granting access, see the Managing User Access guide. The User Guides are found under the ACE Training and Reference Guides link on CBP.gov/modernization under ACE Training and Reference Guides.

Updating Cross Account Access (Granting TAO)

1. Select the **Tools** tab.

2. Select **Cross Account Access**.

3. The Cross Account Access portlet will appear.

4. Select the name of the user whose account you would like to update from your User List. If your User List is long, use the "*Search for Cross Account Owner*" portlet to search for the user.

```
┌ Search for Cross Account Owner ──────────
  * Last Name :  [*            ]

    First Name :  [             ]

  [ Filter ]   [ Reset List ]
└──────────────────────────────────────────
```

5. The permissions page for the user displays. You want to update the permissions specifically for importer accounts. Select the **Importer** sub-tab.

6. The importer accounts and corresponding permissions page appears.

7. To edit the permissions, select the **Edit Importer Permissions** link found at the top right corner of the sub-tab.

8. You can see the specific access rights for this user. Select the scroll bar to scroll down to change the settings.

9. Update access privileges as needed.

10. Select the **Continue** button.

11. Select the scroll bar to move down and see the changes.

12. This user's access permissions have been updated. Select the **Save** button on the bottom left of the screen.

Revoking Cross Account Access

1. Select the **Tools** tab.

2. Select **Cross Account Access**.

3. The "*Cross Account Access*" portlet will appear.

4. Select the name of the user whose account you would like to update from your User List, or use the "*Search for Cross Account Owner*" portlet to search for the user.

Search for Cross Account Owner
* Last Name : *
First Name :
[Filter] [Reset List]

5. The permissions page for the user displays. To revoke access to specific account types or IR numbers, select the **Edit Permissions** link on the account type sub-tab. To revoke access to **all** of your account information, select the **Revoke Access** button.

6. Select the **Continue** button.

7. Select the scroll bar to move down and see the changes.

8. This user's access permissions have been updated. Select the **Save** button on the bottom left corner of the screen.

Additional ACE Resources

For additional assistance, take the available web-based training (WBT).

The URL for the ACE Online Training Center and the required user name and password are:

http://nemo.cbp.gov/ace_online

Do you need additional assistance with Managing Cross Account Access? *If you are a trade caller or if you are calling outside the United States, please contact* ***Technology Service Desk*** *at 1-866-530-4172.*