Automated Commercial Environment (ACE)

Vessel Agency Account Type

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**TOPIC 1: REQUEST ACCESS TO THE VESSEL AGENCY ACCOUNT TYPE**

**INTRODUCTION**

The process to request Vessel Agency account type access differs based on your ACE Portal account access.

**An Account Owner (AO) with an existing ACE Portal account**

If you are a Vessel Master, Vessel Agent, or Vessel Operating Common Carrier (VOCC) with an existing ACE Portal account, refer to **Topic 2: Create a Vessel Agency** for the steps to create a vessel agency.

**NOTE:** If a Proxy and/or Trade user needs access to the Vessel Agency account type, the Account Owner (AO) must grant the access.

**An Account Owner (AO) without an ACE Portal account**

If you are a Vessel Master, Vessel Agent, or Vessel Operating Common Carrier (VOCC) that does not have an existing ACE Portal account, complete and submit the Automated Commercial Environment (ACE) Secure Data Portal Account Owner Designation/Authorization Form. You can find this form at: https://www.cbp.gov/document/guidance/ace-secure-data-portal-account-application.

In the ACE Secure Data Portal Account Owner Designation/Authorization Form, complete:

- **Section A. Account Information**
  
  **IMPORTANT:** In the Service Provider section, select Vessel Agency and complete the information.

- **Section B. Account Owner Designation**

- **Section C. Point of Contact for the Account**

- **Section D. Authorization and Acknowledgement**

After you complete and sign the electronic form, submit it to CBP via email (ace.applications@cbp.dhs.gov) or print, scan, and email it to CBP.

When CBP approves your request, you will receive an email with your new account UserID and temporary password. Complete the steps in the **Modernized ACE Portal – Create Account and Login Quick Reference Guide** to finish your account setup.
**TOPIC 2: CREATE A VESSEL AGENCY**

**INTRODUCTION**

After you log in, you can create the Vessel Agency subaccount. You must complete four steps to create the subaccount: Account Details, Address Details, Contact Details, and Review Details. Fields with an asterisk are required.

**CREATE A VESSEL AGENCY**

1. In the ACE Secure Data Portal, select the **Accounts** tab.

2. In the **Task Selector** panel:
   a. In the **View**: field, select **Vessel Agency** from the drop-down menu.
   b. Select the **GO** button.
   c. Select the **Create Vessel Agency** hyperlink.

3. In the **Account Selector List** panel, select an account.

   ![Account Selector List](image)
   
   **TIP:** If an account does not display, select the **Search** tab to search for an account.

4. In the **Vessel Agency** panel, select the **Continue** button.

   ![Vessel Agency Panel](image)

5. In the **Vessel Agency** panel, **Step 1: Account Details**:
   a. In the **Vessel Agency Name**: field, type the name of the vessel agency.
   b. In the **Vessel Agency Number Type**: field, select the number type for the agency from the drop-down menu.
   c. In the **Vessel Agency Number**: field, type the number based on the selection in the **Vessel Agency Number Type** field.

   **NOTE:** The number format for an Employer Identification Number is ##-#####. The number format for a CBP assigned number is ######-#####. The number format for an importer number is ##-#####XX. To use an importer number, an importer subaccount must exist.
d. In the *Organizational Structure: field, select the vessel agency’s organizational structure from the drop-down menu.

e. Complete other fields as appropriate.

f. Select the Continue button.

6. In the Vessel Agency panel, Step 2: Address Details:

a. In the *Country: field, select a country from the drop-down menu.

   NOTE: USA is the default.

b. In the *Street Address: field, type the address for the Vessel Agency.

c. In the *City: field, type the city where the Vessel Agency is located.

d. In the State/Province: field, select the state/province from the drop-down menu.

e. In the Zip/Postal Code: field, type the zip code for the location.

f. Select the Continue button.

   NOTE: A message displays stating the address has been standardized.

g. Select the Continue button.
7. In the **Vessel Agency** panel, **Step 3: Contact Details**, select the **Create** button.

8. In the **Vessel Agency** panel, **Step 3: Contact Details**:
   a. In the **First Name** field, type the contact’s first name.
   b. In the **Last Name** field, type the contact’s last name.
   c. In the **Street Address** field, type the address for the Vessel Agency.
   d. In the **City** field, type the city where the Vessel Agency is located.
   e. In the **State/Province** field, select the state/province from the drop-down menu.
   f. In the **Zip/Postal Code** field, type the zip code for the location.
   g. Select the **Save and Continue** button.
   
   **NOTE:** A message displays stating the address has been standardized.
   
   h. Select the **Save and Continue** button.
9. In the **Vessel Agency** panel, **Step 4: Review Details**:
   
a. Review the information.

   b. Select the **Save** button.

10. In the success message that displays, select the **OK** button.
**TOPIC 3: CREATE A NEW USER**

**INTRODUCTION**

Use the User Access view to set up trade user roles. Only the Trade Account Owner (TAO) or Proxy Trade Account Owner (PTAO) can add new users to the account and assign access permissions. User roles include:

- **TAO** – Has Portal access and can update the Business Activity Log, Action Plan, account structure, and create account users and proxy users. The TAO can serve as a contact on the account.
- **PTAO** – Has Portal access and can update the Business Activity Log, Action Plan, account structure, and create account users and proxy users. The PTAO can serve as a contact on the account. The PTAO cannot create another PTAO.
- **Account User** - Has Portal access and has read/write access to the Business Activity Log and Action Plan. The Account User can serve as a contact on the account.
- **Trade Contact** – Does not have access to the Portal. The Trade contact’s information is displayed in the Portal as a reference contact for one or more parts of the Trade account.

**CREATE A NEW USER**

1. In the ACE Secure Data Portal, select the **Tools** tab.
2. In the **Task Selector** panel, select **User Access**.
3. In the **User Access** panel:
   a. In the **Add User** field, select **Create New User** from the drop-down menu.
   b. Select the **Continue** button.
   c. In the **First Name:** field, type the **new user’s first name**.
   d. In the **Last Name:** field, type the **new user’s last name**.
   e. In the **Date of Birth:** field, select a date from the **Calendar** icon.
   f. In the **Street Address:** field, type the **new user’s address**.
   g. In the **City:** field, type the **city for the address**.
   h. In the **Country:** field, select a country from the drop-down menu.

   TIP: You can also type a date of birth in **mm/dd/yyyy** format.

   NOTE: The country defaults to USA.
i. In the *Telephone #: field, type the new user’s phone number.

j. In the *Email: field, type the new user’s email address.

k. Select the Save and Continue > button.

NOTE: An Address has been standardized message displays.

l. Select the Save and Continue > button.

4. In the User Access panel:
   a. In the *User Role: field, select a user role radio button.
   b. In the *Access to Top Account: field, select the Yes or No radio button,
   c. Select the Continue button.

5. In the Single Sign-on Partner Access section:
   a. Select the Vessel Agency tab.
   b. Select either the Read-Only Access for All or the Full Access for All button.

c. Select the Save button.

The page refreshes and the access selected displays.

The new user displays in the list.
**TOPIC 4: ADD EXISTING USERS TO AN ACCOUNT**

**INTRODUCTION**

In addition to creating new users, TAOs and PTAOs can add an existing user to their Portal account. An existing user is someone who already has an ACE user ID and password. You will need the user’s ID or Shared Secret to add him/her to an account.

**ADD EXISTING USERS TO AN ACCOUNT**

1. In the **Tools** tab, in the **Task Selector** panel, select **User Access**.
2. In the **User Access** panel:
   a. In the **Add User** field, select **Create New User** from the drop-down menu.
   b. Select the **Continue** button.

3. In the **First Name** field, type the **existing user’s first name**.
   a. In the **Last name** field, type the **existing user’s last name**.
   b. In the **Existing User ID** field, type the **existing user’s shared secret**.
   c. Select the **Continue** button.
4. In the **User Access** panel:
   a. In the **User Role** field, select a user role radio button.
   b. In the **Access to Top Account** field, select the **Yes** or **No** radio button,
   c. Select the **Continue** button.

5. In the **Single Sign-on Partner Access** section:
   a. Select the **Vessel Agency** tab.
b. Select either the **Read-Only Access for All** or the **Full Access for All** button.

c. Select the **Save** button.

The page refreshes and the access selected displays.
TOPIC 5: ADD/EDIT A VESSEL AGENCY ACCOUNT CONTACT

INTRODUCTION

You can add a Primary Contact to an account. After the Primary Contact is created, you can add additional contracts to the account. Fields with an asterisk are required.

ADD A VESSEL AGENCY CONTACT

1. In the ACE Secure Data Portal, select the Accounts tab.
2. In the Accounts tab:
   a. In the View: field, select Vessel Agency from the drop-down menu.
   b. Select the Go button.
3. In the Account Selector List panel:
   a. In the Sort by: field, select a sort option from the drop-down menu.
   b. Select the Go button.
4. In the Accounts section, select an account from the list that displays.
5. In the View Top Account panel, in the Contacts tab, select the Add Contact hyperlink.

   TIP: You can also search for an existing person by typing the person’s last name in the *Last Name field, then selecting the Search button.

6. In the View Top Account panel, select the Create button.
7. In the View Top Account panel:
   a. In the *First Name: field, type the contact’s first name.
b. In the *Last Name:* field, type the contact’s last name.

c. In the **Country:** field, select a country from the drop-down menu.

d. In the **Street Address:** field, type the company’s street address.

e. In the **City:** field, type the city for the address.

f. In the **State/Province:** field, select a state from the drop-down menu.

g. In the **Zip/Postal Code:** field, type the zip code for the location.

h. In the **Telephone #:** field, type your office phone number.

   IMPORTANT: The phone number must be in xxx-xxx-xxxx format.

i. Select the **Save and Continue >** button.

   An Address has been standardized message displays.

j. Select the **Save and Continue >** button.

8. In the **View Top Account** panel:

   a. In the **Contact Type:** field, select the type of contact from the drop-down menu.

   b. In the **P.O. Box:** field, select the post office box number from the drop-down menu.

   OR

   In the **Street Address:** field, type an address.

   NOTE: If the address is already associated with the account, the other fields will auto-populate.

   c. Select the **Save** button.

   An Address has been standardized message displays.
d. Select the **Save** button.

The new contact displays in the **Contacts** tab.

**EDIT A VESSEL AGENCY CONTACT**

1. In the **Accounts** tab:
   a. In the **Account Selector List** panel, in the **Sort by**: field, select a sort option from the drop-down menu.
   b. Select the **Go** button.
2. In the **Accounts** section, select an account from the list that displays.
3. In the **View Top Account** panel, in the **Contacts** tab, in the **Type** column, select a contact hyperlink.

4. In the **View Top Account** panel, select the **Edit** button.

5. In the **View Top Account** panel:
   a. Make any necessary edits.
   b. Select the **Save** button.
An **Address has been standardized** message displays.

c. Select the **Save** button.

d. In the **View Top Account** panel, select the **OK** button.

![View Top Account](image)

The changes display in the **Contacts** tab.
**TOPIC 6: EDIT VESSEL AGENCY ADDRESSES**

**INTRODUCTION**

Once the Top Account is created, you can edit any of the addresses associated with the Top Account. Fields with an asterisk are required.

**EDIT A VESSEL AGENCY ADDRESS**

1. In the ACE Secure Data Portal, select the **Accounts** tab.
2. In the **Accounts** tab:
   a. In the **View** field, select **Vessel Agency** from the drop-down menu.
   b. Select the **Go** button.
3. In the **Account Selector List** panel:
   a. In the **Sort by** field, select a sort option from the drop-down menu.
   b. Select the **Go** button.
4. In the **Accounts** section, select an account from the list that displays.
   a. In the **View Top Account** panel, in the **Type** column, select the contact type hyperlink.
   b. In the **View Top Account** pane, select the **Edit** button.
   c. In the **View Top Account** pane:
      d. Make edits as appropriate
      e. Select the **Save** button.
         An **Address has been standardized** message displays.
f. Select the **Save** button.

The corrected **View Top Account** pane displays.

**NOTE:** If there are errors because of the edits, an error message displays at the top of the pane. When the error is corrected, a message displays that the address has been standardized.

5. Select the **OK** button.