Broker Reporting

Modernized ACE Portal

December 2023

U.S. Customs and
Border Protection

INTRODUCTION

This QRC provides guidance on Broker Reporting in the Modernized ACE Portal.

IMPORTANT: The first time you log in to the Modernized ACE Portal, you will link your Legacy ACE Portal to your Modernized ACE Portal. For more information, reference **Log into the Modernized ACE Portal** section in the **Modernized ACE Portal: Account Types** Quick Reference Guide (QRG).

NAVIGATE TO AN ORGANIZATIONAL BROKER

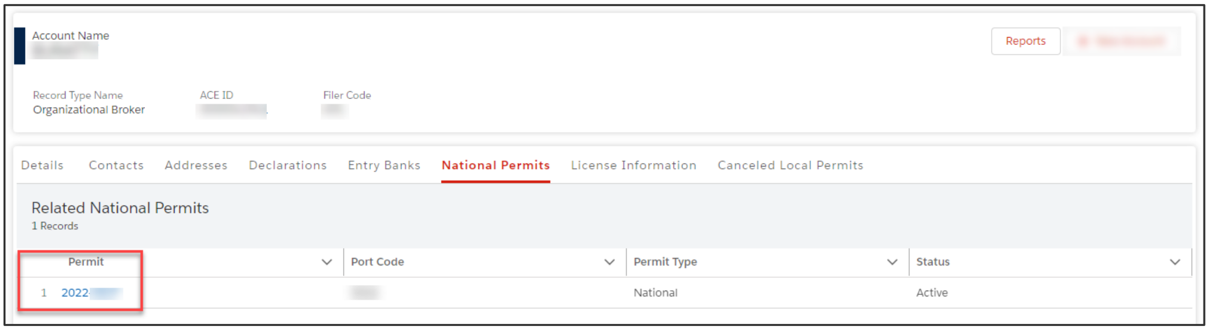
1. In the **Welcome to ACE** home page, in the **Search** field, type *search criteria for the broker account.*

   NOTE: If you have recently viewed an account, you may also select the account in the **Recently Viewed Accounts** table.

2. In the account record:

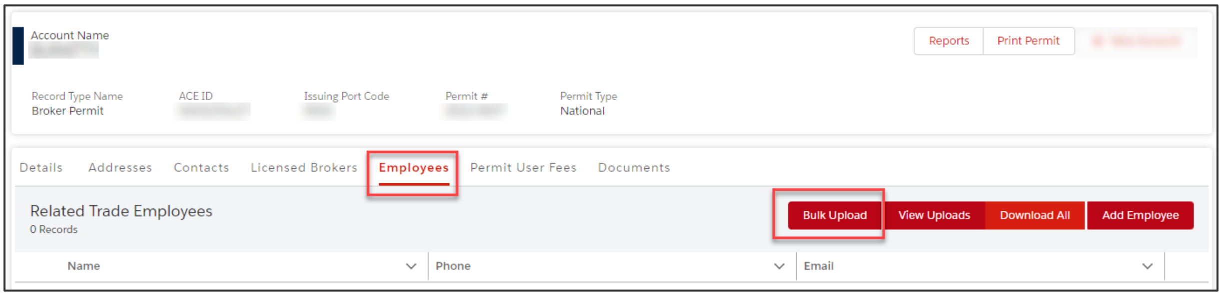
   a. Select the **National Permits** tab.

   b. In the **Permit** column, select the permit hyperlink.

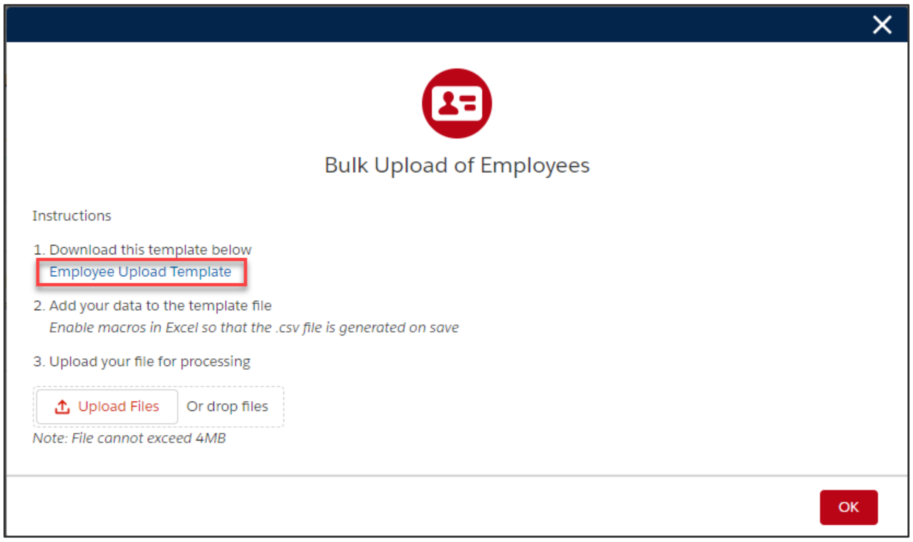


UPLOAD BULK EMPLOYEE DATA

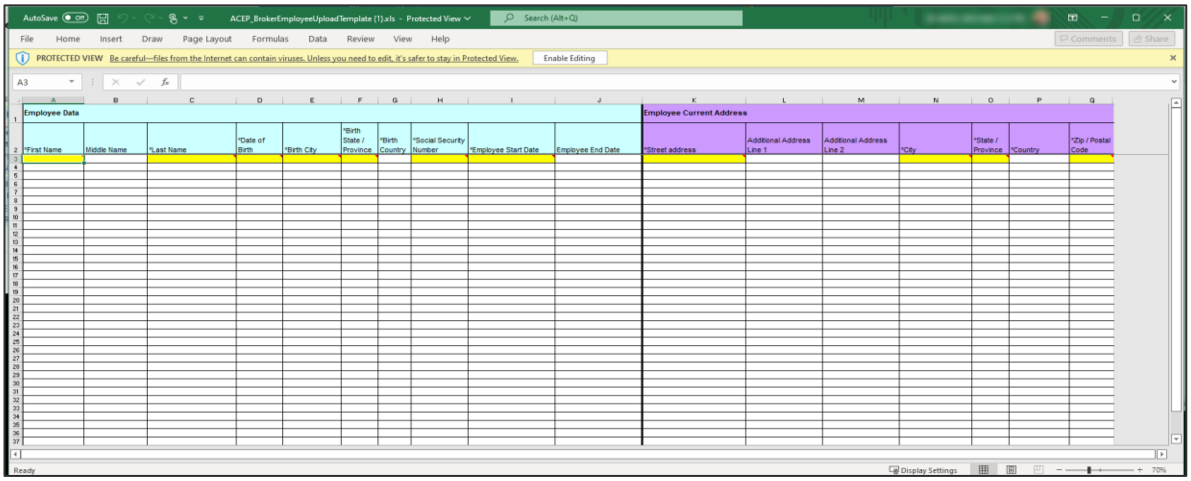
1. Navigate to an Organizational Broker (previously “Broker”), and in the **National Permits** tab, select the hyperlink in the **Permit** column.
2. Select the **Employees** tab.
3. Select the **Bulk Upload** button.



The **Bulk Upload of Employees** dialog box displays.



4. Select the **Employee Upload Template** option. The Employee Upload template displays.



5. Save the file in a location on your computer.

IMPORTANT: The file needs to be saved as a .csv, but it downloads as an .xlsx in order to provide the highlighting and required fields. If the **Enable Macros** button appears, saving will automatically generate a .csv file. If macros are not enabled, users should choose to save it as a .csv.

6. Type information into the spreadsheet, then save the file again.

IMPORTANT: The SSN is masked in the Modernized ACE Portal unless the Trade Account Owner assigns “Full Access” to a Trade user.

IMPORTANT: The employee upload spreadsheet has a maximum limit of 200 employees per upload.

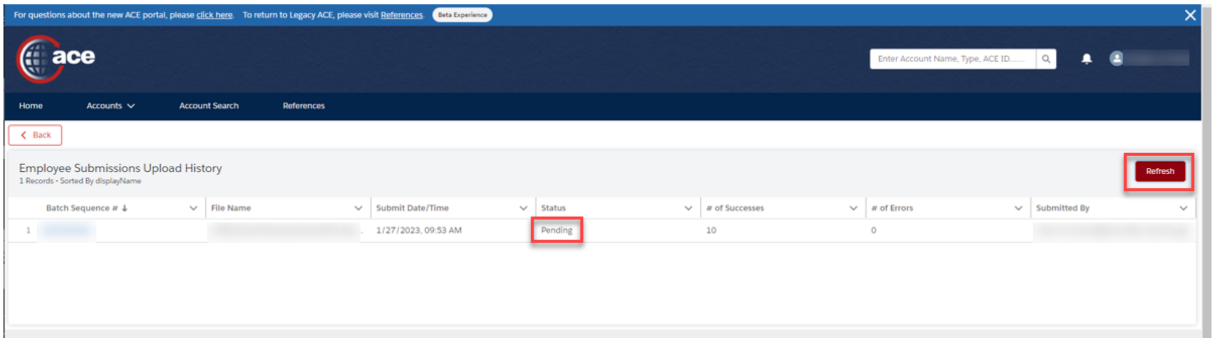
IMPORTANT: When entering an employee address, the building number must be listed before the street name, even if a non-U.S. country’s address standard is to place the building number after the street name. Select the **Upload Files** button in the **Bulk Upload of Employees** dialog box, then select the saved file.

NOTE: Required fields are indicated by an asterisk and shaded cells.

7. Select the **OK** button.

IMPORTANT: If you encounter a **Completed with Errors** message, select **OK**. You can select the **View Uploads** hyperlink, then view the error in the details.

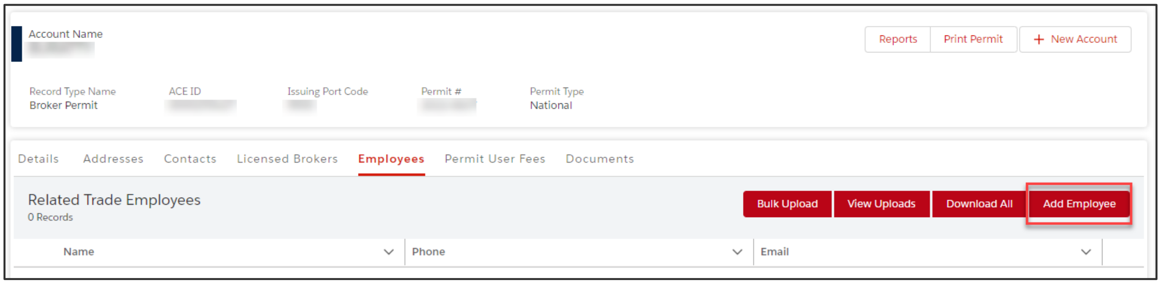
8. A **Pending** status appears when the **Bulk Upload** is processing the employees in the .CSV



9. Select **Refresh** to view **# of Successes**, **# of Errors**, and **Status** change as the upload process progresses.

UPLOAD SINGLE EMPLOYEE DATA

1. Navigate to an organizational broker, and in the **National Permits** tab, select the hyperlink in the **Permit** column.
2. Select the **Employees** tab.
3. Select **Add Employee**.

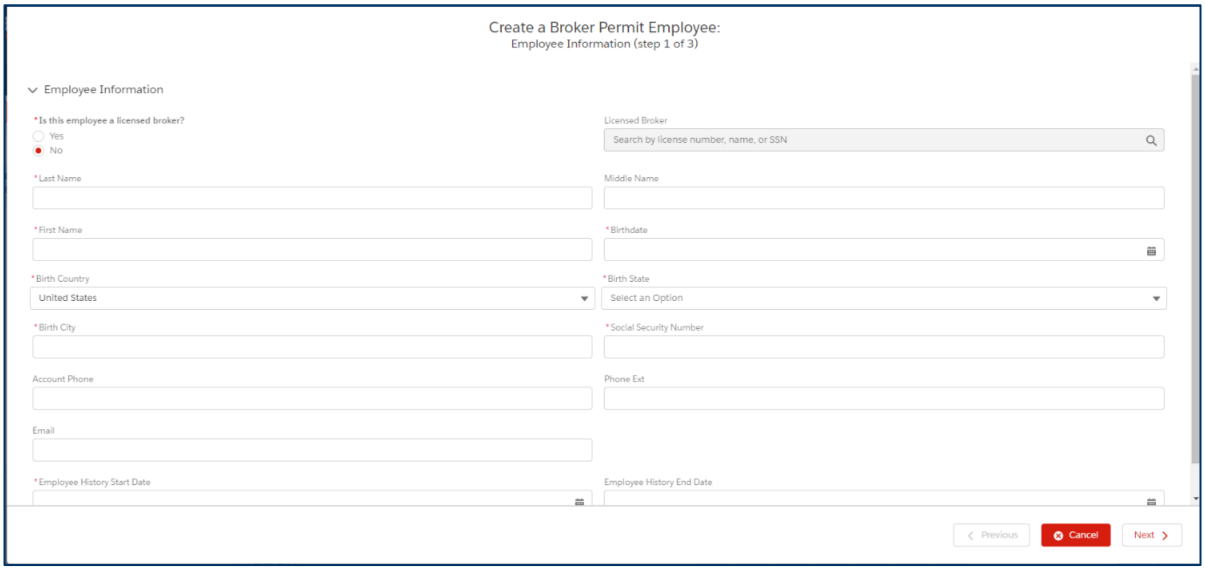


4. In the **Create a Broker Permit Employee** dialog box:
   a. In the **Is this employee a licensed broker?** field, select the **Yes** or **No** radio button.
   b. In the fields, type *data*, as required.
   c. Select the **Next** button.

IMPORTANT: When entering an employee address, the building number must be listed before the street name, even if a non-U.S. country's address standard is to place the building number after the street name.

The **Validate Address** pop-up window will sometimes move the house number to the end of the street address for non-US addresses. If this happens, uncheck the **Use Validated Address?** checkbox. Select the **Confirm** button.

In the review screen, ensure the House Number is still at the beginning of the **Street Address** field. Select **Save**.



NOTE: Required fields are indicated by an asterisk.

Create Designated Recordkeeping Contact and Customs Business Point of Contact

1. Navigate to an organizational broker.
2. In the organizational broker, select the **National Permits** tab.

3. Select the hyperlink for the permit you wish to view.
4. Select the **Contacts** tab.
5. Select **Add Contact**.
6. In **Create a New Contact**, use the drop-down to create the contact.

   NOTE: Required fields are indicated by an asterisk.

BLANKET DECLARATIONS

For detailed information on Blanket Declarations, view the Blanket Declaration Records QRG | U.S. Customs and Border Protection (cbp.gov).