



# WESCCON

EVER CHANGING V.2022

RIDING THE WAVES INTO THE 21ST CENTURY

## ACE Portal: Import & Export

**Learn how to set up your portal contacts correctly in preparation for CBP National Permit regulations implementation as well as how to upload employees to the portal. Gain valuable knowledge of which ACE Reports to run in order to assure compliance.**



# WESCCON

## **ACE Portal – Import & Export**

- **Sandy Coty, Director of Operational Development  
A.N. Deringer Inc, PCC Vice President (Moderator)**
- **Carlos Rodriguez, Information Technology  
Specialist, U.S. Customs & Border Protection**



## Office of Trade

# Automated Commercial Environment (ACE) Update

WESCCON

October 8, 2022

Sandra Langford-Coty, LCB,CCS  
Director of Operational Development  
A.N. Deringer Inc.

Carlos R. Rodriguez  
Information Technology Specialist  
Trade Transformation Office



U.S. Customs and  
Border Protection



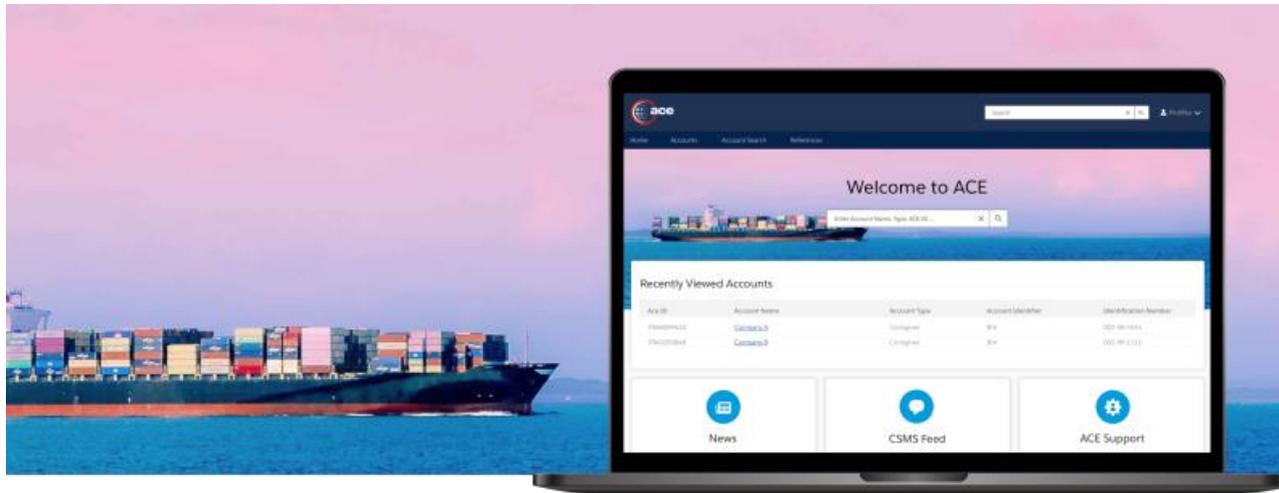
## AUTOMATED COMMERCIAL ENVIRONMENT (ACE) UPDATE

- ACE Portal Modernization and Timeline
- ACE Portal and Reports Demo
- Questions?





# ACE Portal Modernization



- CBP is modernizing the ACE Portal over multiple phases in 2022 and 2023.
- The modernization effort will entail the transition of existing functionality to an upgraded platform, offering easier use and better performance.
- The ACE Portal offers users real-time access to trade data through features such as ACE Reports, ACE account management, and electronic communication with CBP and Partner Government Agencies (PGA).





# ACE Portal Modernization

## ACE Portal Modernization Schedule

CBP will modernize the ACE Portal over four phases. Below is a notional schedule for the transition of the ACE Portal functionality:



For more information on ACE Portal Modernization, please visit <https://www.cbp.gov/trade/automated/ace-portal-modernization>.





# ACE Secure Data Portal Application



## Application

### AUTOMATED COMMERCIAL ENVIRONMENT (ACE) SECURE DATA PORTAL ACCOUNT OWNER DESIGNATION/AUTHORIZATION FORM

Submit this completed document to U.S. Customs and Border Protection (CBP) by providing the requested information in the spaces below. This form constitutes your company's formal request to access its data via the ACE Secure Data Portal and its designation of an Account Owner (the individual responsible for the daily administration of the Account's activities).

**PLEASE NOTE: With the exception of the required signatures, this form must be typed or printed. Failure to complete all required information will delay the processing of your application.**

By signing below and accessing the ACE Secure Data Portal, the Account Owner agrees to be bound by the terms and conditions of portal access as specifically set forth in the Terms and Conditions document (see 72 FR 27632, published May 16, 2007) and any applicable Federal Register Notices (FRNs), including subsequent modifications to currently existing FRNs, as they may relate to the ACE test.

If submitting this form electronically, please click both boxes in section D at the end of this form. This indicates your authorization/approval of the information contained in this document. This will act as your electronic signatures. **Please Note:** If you elect to submit this document electronically, you are reminded that you will be transmitting this information via the public Internet. Data will be sent to the CBP via e-mail. Only use your business e-mail noted on this form to submit your application. To send, click the "Submit by E-mail" button at the bottom of this form *after* you have completed the required sections.

**Paperwork Reduction Act Statement:** An agency may not conduct or sponsor an information collection and a person is not required to respond to this information unless it displays a current valid OMB control number and an expiration date. The control number for this collection is 1651-0105. The estimated average time to complete this application is 20 minutes. If you have any comments regarding the burden estimate you can write to U.S. Customs and Border Protection Office of Regulations and Rulings, 799 9th Street, NW., Washington DC 20229. **Expiration 11/30/2015.**

If this is a change to an active account, please specify:

Please note that the processing of your account will be delayed by 2-3 weeks due to mail process.

#### Section A. Account Information

Name of Company:

Account's Fiscal Year End Date (MM/DD):

Name of Company Officer:   
(include middle initial)

Title of Company Officer:

Company Organizational Structure:

Officer's Date of Birth or Other Valid Date:

## ACE Secure Data Portal



Log In



Apply for an Account

[www.cbp.gov/ace](http://www.cbp.gov/ace)

All other trade activities: [Apply here](#) using the ACE Data Portal Account Application Form.

<https://www.cbp.gov/document/guidance/ace-secure-data-portal-account-application>





# Modernized ACE Portal Login Page

An official website of the United States government [Here's how you know](#)

For questions about the new ACE portal, please [click here](#). [Beta Experience](#)



## U.S. Customs and Border Protection

### Welcome to the ACE Secure Data Portal

Facilitating legitimate trade by automating tools and information

#### Existing Users:

[CBP User Login \(PIV\)](#)

[Trade/PGA User Login](#)

#### New to the ACE Portal?

##### No Existing Account:

For information to get started, click here: [ACE Secure Data Portal Account](#)

##### Existing Legacy Account:

- CBP Users: Click "[CBP User Login \(PIV\)](#)"
- Non-CBP Users: Click "[Trade/PGA User Login](#)"
  - On the next page, click "[Create An Account](#)"
  - Complete a one-time sync of your existing ACE Portal access by entering your legacy ACE Portal account credentials

#### Need Help?

For ACE resources or to contact us, click here: [ACE Support Page](#)

#### Notice to All Users

You are about to access a Department of Homeland Security computer system. This computer system and data therein are property of the U.S. Government and provided for official U.S. Government information and use. There is no expectation of privacy when you use this computer system. The use of a password or any other security measure does not establish an expectation of privacy. By using this system, you consent to the terms set forth in this notice. You may not process classified national security information on this computer system. Access to this system is restricted to authorized users only. Unauthorized access, use, or modification of this system or of data contained herein, or in transit to/from this system, may constitute a violation of section 1030 of title 18 of the U.S. Code and other criminal laws. Anyone who accesses a Federal computer system without authorization or exceeds access authority, or obtains, alters, damages, destroys, or discloses information, or prevents authorized use of information on the computer system, may be subject to penalties, fines or imprisonment. This computer system and any related equipment is subject to monitoring for administrative oversight, law enforcement, criminal investigative purposes, inquiries into alleged wrongdoing or misuse, and to ensure proper performance of applicable security features and procedures. DHS may conduct monitoring activities without further notice.

By logging in to the ACE Portal you agree to be bound by the language set forth in the Terms and Conditions document, published on May 16, 2007, last updated on July 7, 2008.

It is mandatory that all ACE users maintain a current email address within their ACE user profile.

[Terms & Conditions](#)





# Modernized ACE Portal Login Page



U.S. Customs and  
Border Protection

[Forgot your password?](#)

**LOG IN**

**CREATE AN ACCOUNT**





# Modernized ACE Portal – Create Account



U.S. Customs and  
Border Protection

## Create Your CBP Account

CREATE YOUR FREE ACCOUNT TO GET STARTED

**SIGN UP**

[Already have an account? Login Here!](#)





# Modernized ACE Portal Login Page



U.S. Customs and  
Border Protection

[Forgot your password?](#)

**LOG IN**

**CREATE AN ACCOUNT**





# Two Factor Authentication



## U.S. Customs and Border Protection

### Two Factor Authentication

Enter the **Security Token** that has been sent to the email associated with your account

[Resend Security Token](#)

**VERIFY**



# Modernized ACE Portal



## U.S. Customs and Border Protection

**You are about to access a Department of Homeland Security computer system.** This computer system and data therein are property of the U.S. Government and provided for official U.S. Government information and use. There is no expectation of privacy when you use this computer system. The use of a password or any other security measure does not establish an expectation of privacy. **By using this system, you consent to the terms set forth in this notice.** You may not process classified national security information on this computer system. Access to this system is restricted to authorized users only. Unauthorized access, use, or modification of this system or of data contained herein, or in transit to/from this system, may constitute a violation of section 1030 of title 18 of the U.S. Code and other criminal laws. Anyone who accesses a Federal computer system without authorization or exceeds access authority, or obtains, alters, damages, destroys, or discloses information, or prevents authorized use of information on the computer system, may be subject to penalties, fines or imprisonment. This computer system and any related equipment is subject to monitoring for administrative oversight, law enforcement, criminal investigative purposes, inquiries into alleged wrongdoing or misuse, and to ensure proper performance of applicable security features and procedures. DHS may conduct monitoring activities without further notice.

DECLINE

ACCEPT TERMS





# Modernized ACE Portal



U.S. Customs and  
Border Protection

## Welcome to the ACE Secure Data Portal

Facilitating legitimate trade by  
automating tools and information

### Link your Legacy ACE User

Use your Legacy ACE UserId and Legacy ACE Password to link your user and log in to the Modernized ACE Secure Data Portal.

User Id

Password

[Link Legacy ACE Account](#)





# Modernized ACE Portal



**U.S. Customs and  
Border Protection**

## **Welcome to the ACE Secure Data Portal**

Facilitating legitimate trade by  
automating tools and information

**Your account has been linked successfully!**

Now we need to sync your account access from legacy, please click the button below to continue.

[Sync Legacy Account](#)





# ACE Legacy User Link Confirmation Email

**From:** [noreplyace@cbp.dhs.gov](mailto:noreplyace@cbp.dhs.gov)

**Date:** September 28, 2022 at 1:15:25 PM EDT

**To:** [cbolumen@sbcglobal.net](mailto:cbolumen@sbcglobal.net)

**Cc:** [carlos@aol.com](mailto:carlos@aol.com)

**Subject:** ACE Legacy User Link Successful!

Hello,

Your legacy ACE user has been linked successfully in the modernized portal.

If you haven't tried to link a user recently, please contact ACE Support.





# Modernized ACE Portal Login Page



U.S. Customs and  
Border Protection

[Forgot your password?](#)

**LOG IN**

**CREATE AN ACCOUNT**





# Two Factor Authentication



## U.S. Customs and Border Protection

### Two Factor Authentication

Enter the **Security Token** that has been sent to the email associated with your account

[Resend Security Token](#)

**VERIFY**





# Home Page of the Modernized ACE Portal

An official website of the United States government [Here's how you know](#) v

For questions about the new ACE portal, please [click here](#). To return to Legacy ACE, please visit [References](#). Beta Experience



Enter Account Name, Type, ACE ID.....

JEFFREY ENTERPRISE

- [Home](#)
- [Accounts](#) v
- [Account Search](#)
- [References](#)

## Welcome to ACE

v2.11.0

Enter Account Name, Type, ACE ID...

### Recently Viewed Accounts

1 Records

ACE ID	Name	Account Type	Identification Type	Identification Number
1 0009865291	CBP BROKERAGE, ACE PORTAL TEST BROK	Broker Permit	ACE ID	0009865291

Give Us Feedback





# Accounts Page of the Modernized ACE Portal

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[Home](#) [Accounts](#) [Account Search](#) [References](#)

## Top Accounts

Showing 1 / 1 Results

Account Name	ACE ID	Status
1 <a href="#">CBP Incorporated</a>	0005676506	

Keyword Search

Search Filters

Account Name

Identification Type

Identification Number

[Search](#) [Clear](#)

[Give Us Feedback](#)





# Accounts Page of the Modernized ACE Portal

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Enter Account Name, Type, ACE ID.....

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- Accounts ▾
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- References

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## Account Navigation

- ▾ CBP Incorporated  
ACE ID: 0005676506
- ▾ Carrier
  - ACE Help Desk  
Carrier Code: 8ACE
  - ACS OCEAN TEST CARRIER  
Carrier Code: XXXA
  - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
  - CBP Dummy SCAC 0AAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- ▾ Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- ▾ Facility Operator
  - ACS TEST Importer  
Taxpayer ID: 69-9999900
  - Jane Volkers  
Taxpayer ID: 399-55-7777
- ▾ Importer
  - A M DISTRIBUTIONS

Account Name  
CBP Incorporated

[Reports](#)

ACE ID                      Status  
0005676506

**Details**    [Contacts](#)

### ▾ Account Information

Account Name	ACE ID
CBP Incorporated	0005676506
Organizational Structure	DUNS #
US Government	
Website	End of Fiscal Year
<a href="http://www.cbp.gov/ace">http://www.cbp.gov/ace</a>	9/30/4000
Program Participation	
<input type="checkbox"/> Authorized Economic Operator <input type="checkbox"/> Automated Broker Interface <input type="checkbox"/> Automated Clearing House <input type="checkbox"/> Automated Export System <input type="checkbox"/> Automated Invoice Interface <input type="checkbox"/> Automated Manifest System <input type="checkbox"/> Border Release Adv Select Sys <input type="checkbox"/> Business Anti-Smuggling Coalt <input type="checkbox"/> Electronic Protest <input type="checkbox"/> Importer Self-Assessment <input type="checkbox"/> MEDPID <input type="checkbox"/> Nat Customs Automation Program <input type="checkbox"/> Paperless Master In-Bond <input type="checkbox"/> Partners in Protection <input type="checkbox"/> Post Entry Amendment <input type="checkbox"/> Pre-Arrival Processing System <input type="checkbox"/> Reconciliation <input type="checkbox"/> Remote Location Filing	

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# Accounts Page of the Modernized ACE Portal



# Carrier View



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Enter Account Name, Type, ACE ID.....

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- References

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## Account Navigation

- CBP Incorporated  
ACE ID: 0005676506
- Carrier
  - ACE Help Desk  
Carrier Code: 8ACE**
  - ACS OCEAN TEST CARRIER  
Carrier Code: XXXA
  - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
  - CBP Dummy SCAC 0AAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- Facility Operator
  - ACS TEST IMporter  
Taxpayer ID: 69-9999900
  - Jane Volkens  
Taxpayer ID: 399-55-7777
- Importer

Account Name  
**ACE Help Desk**

Reports

Record Type Name	ACE ID	SCAC	Mode of Transport	Status
Carrier	0008078244	8ACE	Truck	Active

- Details**
- Contacts
- Addresses
- Bonds
- Drivers/Crew
- Consignees
- Conveyances
- Equipment
- IR #'s
- Shippers

### Carrier Information

Carrier Name ACE Help Desk	Taxpayer ID Type Employer ID Number (EIN)
Taxpayer ID 10-1234567	ACE ID 0008078244
Mode of Transport Truck	SCAC 8ACE

- > Other Company Name
- > Organization Information
- > Insurance

Give Us Feedback

javascript:void(0); UTIONS





# Exporter View

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## Account Navigation

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 ACE ID: 0005676506
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Carrier Code: 8ACE
  - ACS OCEAN TEST CARRIER  
Carrier Code: XXXA
  - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
  - CBP Dummy SCAC 0AAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- ▾ Exporter
  - CR4236 Test Exporter 88 8881000**  
EIN: 88-8881000
- ▾ Facility Operator
  - ACS TEST IMporter  
Taxpayer ID: 69-9999900
  - Jane Volkers  
Taxpayer ID: 399-55-7777
- ▾ Importer
  - A M DISTRIBUTIONS

Account Name  
CR4236 Test Exporter 88 8881000

[Submit AES Filing](#) [Reports](#)

Record Type Name	ACE ID	EIN	Status
Exporter	0010397136	88-8881000	EIN Pending

- Details**
- Contacts
- Addresses

### ▾ Exporter Information

Exporter Name  
CR4236 Test Exporter 88 8881000

ACE ID  
0010397136

EIN  
88-8881000

▸ Other Company Name(s)

▸ Organization

▸ Account Status

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# Facility Operator View

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Enter Account Name, Type, ACE ID.....

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## Account Navigation

- CBP Incorporated  
ACE ID: 0005676506
- Carrier
  - ACE Help Desk  
Carrier Code: 8ACE
  - ACS OCEAN TEST CARRIER  
Carrier Code: XXXA
  - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
  - CBP Dummy SCAC OAAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- Facility Operator
  - ACS TEST IMporter  
Taxpayer ID: 69-9999900**
  - Jane Volkens  
Taxpayer ID: 399-55-7777
- Importer

Account Name  
**ACS TEST IMporter**

Reports

Record Type Name	ACE ID	Taxpayer ID
Facility Operator	0009013579	69-9999900

- Details**
- Contacts
- Addresses
- Facilities
- Subzone Sites
- GP Sites

### Facility Operator Information

Proprietor Name	ACE ID
ACS TEST IMporter	0009013579
Taxpayer ID Type	Taxpayer ID
Employer ID Number (EIN)	69-9999900

Give Us Feedback

javascript:void(0); UTIONS





# Importer View

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Enter Account Name, Type, ACE ID.....

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## Account Navigation

- CBP Incorporated  
ACE ID: 0005676506
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    - ACE Help Desk  
Carrier Code: 8ACE
    - ACS OCEAN TEST CARRIER  
Carrier Code: XXXA
    - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
    - CBP Dummy SCAC OAAR  
Carrier Code: OAAR
    - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
  - Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
  - Facility Operator
  - ACS TEST IMporter  
Taxpayer ID: 69-9999900
    - Jane Volkers  
Taxpayer ID: 399-55-7777
  - Importer
  - A M DISTRIBUTIONS**

Account Name  
**A M DISTRIBUTIONS**

[Reports](#)

Record Type Name	ACE ID	IR #	Status
Importer	0002659387	36-308169600	Inactive

- Details**
- Contacts
- Addresses
- Related Businesses
- Notify Parties
- Drawback
- Bonds
- Declarations

- > Importer Information
- > Other Company Name
- > Additional Details
- > Company Details
- > Banking Details
- > Partnership Details
- > Administration Control Information
- > Certified Details
- > Mode of Communication

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# Organizational Broker View

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Enter Account Name, Type, ACE ID.....

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## Account Navigation

- ▾ CBP Incorporated  
 ACE ID: 0005676506
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Carrier Code: 8ACE
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Carrier Code: XXXA
  - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
  - CBP Dummy SCAC 0AAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- ▾ Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- ▾ Facility Operator
  - ACS TEST IImporter  
Taxpayer ID: 69-9999900
  - Jane Volkers  
Taxpayer ID: 399-55-7777
- ▾ Importer
  - A M DISTRIBUTIONS

Account Name  
CBP BROKERAGE, ACE PORTAL TEST BROK

Reports

Record Type Name	ACE ID	Filer Code
Organizational Broker	0000154231	Y05

- Details**
- Contacts
- Addresses
- Declarations
- Entry Banks
- Broker Permits
- License Information
- Triennial Fees
- Corporate Officers
- Application Information

### ▾ Broker Account Information

Organization Name	ACE ID
CBP BROKERAGE, ACE PORTAL TEST BROK	0000154231
Organizational Structure	Taxpayer ID Type
US Government	Employer ID Number (EIN)
Taxpayer ID	DUNS #
XXX-XX-XXXX	
Check Digit Factor	
0	

### > Filer Code Information

### > Other Company Name(s)

### > Program Participation

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# Protest Filer View

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Carrier Code: BACE
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Carrier Code: XXXA
  - ACS TEST RAIL CARRIER  
Carrier Code: XXXB
  - CBP Dummy SCAC 0AAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- ▾ Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- ▾ Facility Operator
  - ACS TEST IImporter  
Taxpayer ID: 69-9999900
  - Jane Volkers  
Taxpayer ID: 399-55-7777
- ▾ Importer
  - A M DISTRIBUTIONS

Account Name  
ACS Test Importer

[Launch Protest](#) [Reports](#)

Record Type Name	Protest Filer Number	ACE ID
Protest Filer	69-9999999	0010994849

- Details**
- Contacts
- Addresses

### ▾ Protest Filer Information

Protest Filer Name  
ACS Test Importer

ACE ID  
0010994849

Protest Filer Number  
69-9999999

Protest Filer Number Type  
Employer ID Number (EIN)

### > Organization

### > Other Company Name(s)

### > Protest Filer Information

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# Service Provider View

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Carrier Code: XXXB
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Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
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  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- ▾ Facility Operator
  - ACS TEST IMporter  
Taxpayer ID: 69-9999900
  - Jane Volkers  
Taxpayer ID: 399-55-7777
- ▾ Importer
  - A M DISTRIBUTIONS

Account Name  
**Sam s Strawberry Service Provider**

Reports

Record Type Name	ACE ID	Service Provider Type	External Id	ABI Status
Service Provider	0008153897	Preparer	XXXE	No

**Details**   Contacts   Addresses

### Service Provider Information

Service Provider Type Preparer	Organizational Structure Corporation
Service Provider Name Sam s Strawberry Service Provider	Taxpayer ID Type Employer ID Number (EIN)
Taxpayer ID 00-0000004	ABI Status No

> ID Type

> Other Company Name(s)

Give Us Feedback



# Surety View



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Beta Experience



Enter Account Name, Type, ACE ID.....

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Carrier Code: XXXB
  - CBP Dummy SCAC 0AAR  
Carrier Code: 0AAR
  - TRUCK AMS TEST CARRIER  
Carrier Code: XXXT
- Exporter
  - CR4236 Test Exporter 88 8881000  
EIN: 88-8881000
- Facility Operator
  - ACS TEST IMporter  
Taxpayer ID: 69-9999900
  - Jane Volkens  
Taxpayer ID: 399-55-7777
- Importer
  - A M DISTRIBUTIONS

Account Name  
CBP ASD Surety

Reports

Record Type Name	ACE ID	CBP Surety Code	Status
Surety	0010296215	CBP	Active

Details [Contacts](#) [Addresses](#) [Bonds](#) [CSPOA's](#)

### Surety Information

Surety Name	ACE ID
CBP ASD Surety	0010296215
Taxpayer ID Type	Taxpayer ID
Employer ID Number (EIN)	12-3456788

### Organization Information

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# Account Search Page

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All ▾

Showing 0 / 0 Results

Account Type ▾	Account Name ▾	Identification Type ▾	Identification Number ▾	ACE ID ▾
----------------	----------------	-----------------------	-------------------------	----------

### \* Keyword Search

### Search Filters

#### Account Name

#### Account Type

All ▾

#### Identification Type

Select One... ▾

#### Identification Number

Search

Clear

[Give Us Feedback](#)





# Reference Page

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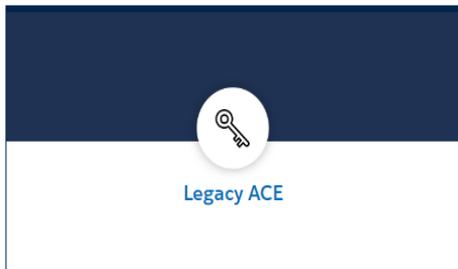
For questions about the new ACE portal, please [click here](#). To return to Legacy ACE, please visit [References](#). [Beta Experience](#)



JEFFREY ENTERPRISE

- Home
- Accounts
- Account Search
- References

**REMINDER:** Login to each reference tab application every 45 days to keep your account active.



Legacy ACE

- About CBP
- Newsroom
- Travel
- Trade
- Border Security
- Careers



U.S. Customs and Border Protection



**CBP Information Center**  
Comments: 202-325-8000



CBP.gov  
An official website of the [U.S. Customs and Border Protection](#)

- [Accessibility](#)
- [FOIA](#)
- [No FEAR Act](#)
- [The White House](#)
- [Accountability](#)
- [Forms](#)
- [Privacy](#)
- [USA.gov](#)

National Terrorism Advisory System



**BULLETIN**  
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# Cross Account Access (CAA) vs. Adding An Existing User to Access an Importer's ACE Portal Account



Cross Account Access (CAA) is a functionality in the ACE Portal 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. The receiving TAO can share the CAA with his/her own ACE Portal account users.

## [ACE Accounts](#)

Adding Existing Users to an Account is a process where an account TAO or Proxy Trade Account Owner (PTAO) can add an existing ACE Portal user to their account. An existing user is someone who already has an ACE user ID and password. In order to add an existing ACE user, you will need the user's first name, last name and ACE user ID.

## [Manage User Access](#)



# Home Tab



- Home
- Accounts
- References
- Tools



### Task List

There are no approvals

Approvals(0) [Notifications\(3\)](#) [Forms\(0\)](#)

Show: All

Title	Date Created	Description	Claimed
-------	--------------	-------------	---------

### Search Forms

\*Indicates field is required

Search for CBP Forms

Form Type:

Date of Issue:  (mm/dd/yyyy) To  (mm/dd/yyyy)

Date of Entry:  (mm/dd/yyyy) To  (mm/dd/yyyy)

Entry Summary #:

IR #:

Port Code:  [Lookup Port Code](#)

Reference or File #:

Mfr./Shipper/Seller:

CBP Status:

Action #	Form Type	Entry Summary #	IR #	Date of Issue	CBP Status
----------	-----------	-----------------	------	---------------	------------

### Phone Directory

[Update my profile](#)

Search On:  Search For:

### Reminder

Monday, May 24, 2021

- Please enter your reminder text.

### ACE News

News

April 19, 2021 - NEW FEATURE!!! ACE PORTAL CENTERS PHONE DIRECTORY LINK NOW AVAILABLE !!!

CBP is excited to announce a new resource, a comprehensive Center employee phone contact list, developed exclusively for ACE Portal Account Users. The functionality can be found in the form of a Center Phone Icon (titled "CEE") located at the upper right-hand corner of your ACE Portal Landing Page. The Centers are the modern organization and operating model for processing trade designed to enhance and improve the approach to processing trade activities that aligns with current business practices of the importing public. At the core of CBP's trade responsibilities is the requirement to obtain accurate, concrete and reliable data to support trade transactions. Data reliability depends on many factors - one for which the Center is well-positioned, which is developing relationships with the trade community. The unveiling of this phone list serves to augment the current Center Management Directory found on CBP.gov and enhances our efforts to foster connectivity with the Trade Community. We encourage you to try it out.





# Accounts Tab



**Task Selector** ?

Select Account Type

View:

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

**Account Selector List** ?

View Settings

Sort by:

Accounts

- CBP Incorporated ↑

**View Top Account** ?

**Top Account Information**

Account Name: CBP Incorporated  
 ACE ID: 0005676506  
 Organizational Structure: US Government  
 DUNS #:  
 Website: www.cbp.gov  
 End of Fiscal Year: 9/30

**Program Participation:**

**Contacts**

Showing 1 - 5 of 5

Type	Last Name	First Name	Phone	Email
<a href="#">Primary Point of Contact</a>	Doe	Jane	866-530-4172	ace.support@cbp.dhs.gov
<a href="#">Alternate Point of Contact</a>	Ferguson	Crystal	866-530-4172 Ext 1	ace.support@cbp.dhs.gov
<a href="#">Alternate Point of Contact</a>	Lawson	Heather	571-468-5065	
<a href="#">Account Owner</a>	Enterprise	Jeffrey	571-468-2028	ACE.Support@cbp.dhs.gov
<a href="#">Principal Officer</a>	Doe	John	703-555-5555	Johndoe@cbp.gov

**Broker** ?





# Accounts Tab (Cont.)

**Task Selector** ?

Select Account Type  
View:

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

**Account Selector List** ? = □

View Settings

Sort by:

Accounts

- CBP Incorporated ↑
- CBP BROKERAGE, ACE PORTAL TEST BROK ↑ ↓

**View Top Account** ? = □

Please select a valid top account.

**Broker** ? = □

**Broker Account Information**

Organization Name: CBP BROKERAGE, ACE PORTAL TEST BROK  
 ACE ID #: 0000154231  
 Organization Structure: US Government  
 Taxpayer ID Type: USA: Employer ID Number  
 Taxpayer ID #: 12-3456788  
 DUNS #:   
 Entry Specialist Team:   
 Check Digit Factor: 0

**Filer Code Information**

Filer Code: Y05

**Other Company Name(s)**

DBA:   
 DIV:   
 Date Formed: 11/02/1992  
 State Formed In:   
 Company Website:

**Program Participation**

**Contacts** [Addresses](#) [Entry Banks](#) [Licensed Brokers](#) [License Information](#)

Showing 1 - 5 of 5

Type	Last Name	First Name	Phone	Email
<a href="#">Primary Point of Contact</a>	Enterprise	Jeffrey		
<a href="#">Primary Point of Contact</a>	Solomon	Ani		
<a href="#">Technical Contact</a>	Smith	John	555-111-1212	john.d.smith@cbpbrokerage.com
<a href="#">Primary Point of Contact</a>	Shannon	Neil		
<a href="#">Primary Point of Contact</a>	Rodriguez	Carlos		



# Accounts Tab (Cont.)



**Task Selector** ?

Select Account Type  
View: Broker

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

**Account Selector List** ?

View Settings

Sort by: --Select--

- Accounts**
- [CBP Incorporated](#) ↑
  - [CBP BROKERAGE, ACE PORTAL TEST](#) ↑
  - [BROK](#)
  - [Local Permit 1001](#) ↑
  - [Local Permit 1303](#) ↑
  - [Local Permit 1401](#) ↑
  - [Local Permit 1512](#) ↑
  - [Local Permit 1601](#) ↑
  - [Local Permit 2304](#) ↑
  - [Local Permit 2704](#) ↑
  - [Local Permit 2809](#) ↑
  - [Local Permit 3001](#) ↑
  - [Local Permit 3901](#) ↑
  - [Local Permit 4101](#) ↑
  - [Local Permit 5301](#) ↑
  - [Local Permit 5501 \[Revoked\]](#) ↑
  - [National Permit 9900](#) ↑

**View Top Account** ?

Please select a valid top account.

**Broker** ?

**Account Information**

Organization Name:  
ACE ID #:

**Permit Information**

DBA:  
Permit #:  
Permit Type:  
Status:  
Issuing Port:  
Issuing Date:  
Port of Application:  
Authorized CBP official:

**Permit Qualifier Information**

Qualifier Name:  
Qualifier ACE ID:  
Qualifier License Number:  
Qualifier Start Date:  
Qualifier End Date:

**Permit Documents Received**

District Employees List



# Accounts Tab (Cont.)



**Task Selector** ?

Select Account Type  
View:

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

**Account Selector List** ?

View Settings  
Sort by:

Accounts

- CBP Incorporated ↑
- CBP BROKERAGE, ACE PORTAL TEST BROK ↑
- Local Permit 1001 ↑

**View Top Account** ?

Please select a valid top account.

**Broker** ?

**Account Information**

**Organization Name:** CBP BROKERAGE, ACE PORTAL TEST BROK  
**ACE ID #:** 0009865291

**Permit Information**

**DBA:** CBP BROKERAGE, ACE PORTAL TEST BROK  
**Permit #:** 10-14002  
**Permit Type:** Local  
**Status:** Pending  
**Issuing Port:** 1001-New York, NY  
**Issuing Date:** 01/02/2014  
**Port of Application:**  
**Authorized CBP official:** Center Director, Electronics

**Permit Qualifier Information**

**Qualifier Name:** Jeffrey Enterprise  
**Qualifier ACE ID:** 0009865236  
**Qualifier License Number:** 59883  
**Qualifier Start Date:** 01/02/2014  
**Qualifier End Date:**

Permit Documents Received

**Contacts** [Addresses](#) [Licensed Brokers](#) [Employees](#) [Waiver Requests](#) [Permit User Fees](#)

Showing 1 - 2 of 2

Type	Last Name	First Name	Phone	Email
<a href="#">Primary Point of Contact</a>	Enterprise	Jeffrey	866-530-4172	ACE.SUPPORT@CBP.DHS.GOV
<a href="#">Technical Contact</a>	Smith	John	555-111-1212	john.d.smith@cbpbrokerage.com



# Employees Tab



**Task Selector** ?

Select Account Type  
View: Broker [GO]

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

**Account Selector List** ? [GO]

View Settings  
Sort by: --Select-- [GO]

Accounts

- CBP Incorporated ↑
- CBP BROKERAGE, ACE PORTAL TEST BROK ↑
- Local Permit 1001 ↑

**View Top Account** ? [GO]

Please select a valid top account.

**Broker** ? [GO] [Edit]

**Account Information**  
Organization Name: CBP BROKERAGE, ACE PORTAL TEST BROK  
ACE ID #: 0009865291

**Permit Information**  
DBA: CBP BROKERAGE, ACE PORTAL TEST BROK  
Permit #: 10-14002  
Permit Type: Local  
Status: Pending  
Issuing Port: 1001-New York, NY  
Issuing Date: 01/02/2014  
Port of Application:  
Authorized CBP official: Center Director, Electronics

**Permit Qualifier Information**  
Qualifier Name: Jeffrey Enterprise  
Qualifier ACE ID: 0009865236  
Qualifier License Number: 59883  
Qualifier Start Date: 01/02/2014  
Qualifier End Date:

Permit Documents Received

[Contacts](#) [Addresses](#) [Licensed Brokers](#) **Employees** [Waiver Requests](#) [Permit User Fees](#)

Showing 1 - 2 of 2

[Upload Employees](#) [View Uploads](#) [Download Current](#) [Download All](#) [Add Employee](#)

Name	Street (Physical) Address	Telephone
JOE SMITH	1801 N Beaugard St Alexandria VA 22311-1701	866-530-4172
TEST FIRST NAME TEST LAST NAME	13321 PADRE AVE FORT WORTH TX 76244-4329	





# Employees Tab



**Task Selector** ?

Select Account Type  
View: Broker [v] [GO]

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

**Account Selector List** ? [v] [x]

View Settings  
Sort by: --Select-- [v] [Go]

Accounts [x] [v]

- CBP Incorporated ↑
  - CBP BROKERAGE, ACE PORTAL TEST BROK [x] [v]
  - Local Permit 1001 ↑

**View Top Account** ? [v] [x]

Please select a valid top account.

**Broker** ? [v] [x] [Edit]

**Account Information**

Organization Name: CBP BROKERAGE, ACE PORTAL TEST BROK  
ACE ID #: 0009865291

**Permit Information**

DBA: CBP BROKERAGE, ACE PORTAL TEST BROK  
Permit #: 10-14002  
Permit Type: Local  
Status: Pending  
Issuing Port: 1001-New York, NY  
Issuing Date: 01/02/2014

**Port of Application:**  
Authorized CBP official: Center Director, Electronics

**Permit Qualifier Information**

Qualifier Name: Jeffrey Enterprise  
Qualifier ACE ID: 0009865236  
Qualifier License Number: 59883  
Qualifier Start Date: 01/02/2014  
Qualifier End Date:

Permit Documents Received

[Contacts](#) [Addresses](#) [Licensed Brokers](#) **Employees** [Waiver Requests](#) [Permit User Fees](#)

[x] [Upload Employees](#) [x] [View Uploads](#) [x] [Download Current](#) [x] [Download All](#) [x] [Add Employee](#)

Showing 1 - 2 of 2

Name	Street (Physical) Address	Telephone
JOE SMITH	1801 N Beaugard St Alexandria VA 22311-1701	866-530-4172
<a href="#">TEST FIRST NAME TEST LAST NAME</a>	13321 PADRE AVE FORT WORTH TX 76244-4329	



# Employees Tab (Cont.)



**ace secure data portal** U.S. Customs and Border Protection Welcome, Jeffrey Enterprise!

Home Accounts References Tools

### Task Selector

Select Account Type  
View: Broker

Select Task

- Accounts
  - [Change History](#)
  - [Reports](#)
  - [BAL](#)
  - [Action Plan](#)
  - [Statements](#)
  - [LPCs](#)
  - [Declarations](#)
  - [Mode of Communication](#)

### Account Selector List

View Settings  
Sort by: --Select--

Accounts

- CBP Incorporated
  - CBP BROKERAGE, ACE PORTAL TEST
    - BROK
      - Local Permit 1001

### View Top Account

Please select a valid top account.

#### Broker

Upload File

File:

[Download Template](#)

Batch Sequence #	File Name	Submit Date/Time	Status	Submitted By	Purge Date
OK					





# Declarations for ACE Entry Summary Filing



**ace secure data portal** U.S. Customs and Border Protection

Home Accounts References Tools

**Task Selector** ?

Select Account Type  
View: Importer [GO]

Select Task

- Accounts
- Create Importer
- Change History
- Reports
- BAL
- Action Plan
- Bonds
- Statements
- LPCs
- Declarations
  - Portal Account
  - Non-Portal Account
  - Mode of Communication

**Account Selector List** ? [GO]

View Settings  
View By:  Acct Name  IR Number

Sort by: --Select-- [GO]

Accounts  
CBP Incorporated ↑

**Declarations**

Add Declaration  
[Create]

Filter Declarations

Account ID #: [ ] All MID #s:

Account Name: [ ] Manufacturer ID#: [ ]

Valid From: [ ] (mm/dd/yyyy) Manufacturer Name: [ ]

Valid To: [ ] (mm/dd/yyyy) Ruling #: [ ]

Status: --Select-- HTS #: [ ]

Status Date: [ ] (mm/dd/yyyy) Case #: [ ]

Declaration #: [ ] Filer #: --Select--

Declaration Type: --Select--

[Filter] [Cancel]

**Search Results**  
Showing 1 - 6 of 6

Decl. #	Decl. Type	Account ID #	Case #	Ruling #	Status	Valid From	Valid To
<a href="#">0000263224</a>	NRBS	69-9999999AC	<a href="#">A-570-506-000</a>		Active	01/01/2010	12/31/2010
<a href="#">0000272732</a>	NRBS	12-345678900	<a href="#">A-475-201-086</a>		Active	05/01/2011	05/01/2012
<a href="#">0000281883</a>	NRBS	12-345678900	<a href="#">A-475-201-086</a>		Active	01/01/2012	01/03/2013
<a href="#">0000290803</a>	NRBS	69-9999999AC	<a href="#">A-475-201-086</a>		Active	02/13/2012	02/13/2013
<a href="#">0000302190</a>	NRBS	12-345678900	<a href="#">A-475-201-086</a>		Active	06/01/2012	06/01/2013
<a href="#">0000302218</a>	NRBS	12-345678900	<a href="#">A-475-201-086</a>		Active	06/07/2012	06/07/2013

- Provide Nationwide CBP visibility to:
  - ✓ Affidavits of Manufacturer
  - ✓ Importer Certifying Statements
  - ✓ Non-Reimbursement Blanket Statements (Antidumping/Countervailing Duty)
  - ✓ North American Free Trade Agreement (NAFTA) Certificates of Origin



# AD/CVD Module



**Task Selector** ?

- Select Task
- Links
- HTS
- Port
- Gold Rate
- Country Code
- MID
- UN Loc Code

**Links** ?

**Importer Security Filing (ISF)**

Click the button below to view the ISF web site in a new web browser window:

**AD/CVD**

Click the button below to view the AD/CVD web site in a new web browser window:

**Truck Manifest Trade Portal**

Click the button below to launch the Truck Manifest Trade Portal web site in a new web browser window:

# AD/CVD Case Search



## Search

### Search By

Case

case number

Clear Search

[Advanced Search](#)

DOC / E&C Contact Info

Online Help

## Case Search Results



Filter

CBP Case #	Indicators	DOC Case #	Case Name	Status	Suspend ES Liq.	Manufacturer Name	Exporter Name	Rate Application	Current CD Rate	Companion Case # (CBP)
------------	------------	------------	-----------	--------	-----------------	-------------------	---------------	------------------	-----------------	------------------------

- No records to display -

Items per page: 10 0 of 0



# AD/CVD Message Search



U.S. Customs & Border Protection  
U.S. Department of Homeland Security

ADCVD

CBP Incorporated

## Search

### Search By

Message

IMN/Message #

Clear

Search

[Advanced Search](#)

DOC / E&C Contact Info

Online Help

## Message Search Results



[Filter Search Results](#)

IMN	Message #	Case Number & Short Case Name	Status	Message Date	Type/Subtype	POI/POR	Period Covered	Message Title
-----	-----------	-------------------------------	--------	--------------	--------------	---------	----------------	---------------

- No records to display -

Items per page: 10 0 of 0



# Forms Trade Portal



## Task Selector ?

- Select Task
- Links
- HTS
- Port
- Gold Rate
- Country Code
- MID
- UN Loc Code

## Links ?

### AD/CVD

Click the button below to view the AD/CVD web site in a new web browser window:

Launch AD/CVD

### Truck Manifest Trade Portal

Click the button below to launch the Truck Manifest Trade Portal web site in a new web browser window:

Launch Truck Manifest Trade Portal

### Forms Trade Portal

Click the button below to launch the Forms Trade Portal web site in a new web browser window:

Launch Forms Trade Portal

ACE-Forms is only supported by Chrome or Firefox browsers, please logout and switch to one of those browsers to relaunch the application.

[CBP Forms](#)



# Forms Trade Portal



U.S. Customs & Border Protection  
U.S. Department of Homeland Security

ACE Forms

Jeffrey Enterprise

## Search Forms

Entry Number

Enter full Entry #: ABC-123456789

Search

Advanced Search

## Trade Hotlist

My Forms (Last 90 Days)

Pending Response 0

Overdue 0

## Forms Search Results

Filter

Lead Entry Number	Associated Summary	Form Type	Entry Date	Importer Number	Issue Date	Status	Port of Entry	Center ID	Team
-------------------	--------------------	-----------	------------	-----------------	------------	--------	---------------	-----------	------

– No form found –

Items per page: 10 0 of 0 |< < > >|

[CBP Forms](#)



# MID Search



**Task Selector** ?

- [Select Task](#)
- [Links](#)
- [HTS](#)
- [Port](#)
- [Gold Rate](#)
- [Country Code](#)
- MID**
- [UN Loc Code](#)

**MID Search** ?

**MID:**

**Firm Name:**

MFR ID	Status	Firm Name	City
--------	--------	-----------	------



- Task Selector ?
- [User Account Administration](#)
- User Access**
- [Cross Account Access](#)
- [Find Users](#)
- [Merge Accounts](#)
- [Change Password](#)
- [Manifest Tools](#)

## User Access

\*Indicates field is required

### Add User

-- Select --

### Filter Users

\* Last Name:

First Name:

\* Display:  My Users  All Persons

Showing 1 - 10 of 68

	Last Name	First Name	User ID
<a href="#">Welter</a>		Patricia	PW6478
<a href="#">Welter</a>		Patricia	PW3842
<a href="#">Mulder</a>		Janet	JM1ae5
<a href="#">Brown</a>		Anita	AB5105c
<a href="#">Enterprise</a>		B	BE51a01
<a href="#">Korpusik</a>		Frank	FK44fbf
<a href="#">radrodriguez</a>		carlos	cr36b3d
<a href="#">Lawler</a>		Kathy	KL86faa
<a href="#">Barela</a>		Michael	MB8ab4e
<a href="#">McCann</a>		Shari	SM2ab84

[1] [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) > >>

# User Access



- Task Selector ?
- [User Account Administration](#)
- User Access**
- [Cross Account Access](#)
- [Find Users](#)
- [Merge Accounts](#)
- [Change Password](#)
- [Manifest Tools](#)

## User Access

\*Indicates field is required

### Add User

-- Select --

### Filter Users

\* Last Name:

First Name:

\* Display:  My Users  All Persons

Showing 1 - 10 of 68

	Last Name	First Name	User ID
<a href="#">Welter</a>		Patricia	PW6478
<a href="#">Welter</a>		Patricia	PW3842
<a href="#">Mulder</a>		Janet	JM1ae5
<a href="#">Brown</a>		Anita	AB5105c
<a href="#">Enterprise</a>		B	BE51a01
<a href="#">Korpusik</a>		Frank	FK44fbf
<a href="#">radrodriguez</a>		carlos	cr36b3d
<a href="#">Lawler</a>		Kathy	KL86faa
<a href="#">Barela</a>		Michael	MB8ab4e
<a href="#">McCann</a>		Shari	SM2ab84

[1] [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) > >>





# ACE Trade Resources



## Training

Find user guides and online courses on the ACE Portal and system functions.

[www.cbp.gov/ace-training](http://www.cbp.gov/ace-training)



## E-mail Alerts

Receive automatic updates on ACE: system outages, new capabilities, technical documentation and more.

<https://www.cbp.gov/trade/automated/cargo-systems-messaging-service>



## Support

For support on ACE, including ACE Portal, ACE AESDirect, technical support and more.

[www.cbp.gov/ace-support](http://www.cbp.gov/ace-support)



## Technical Documentation

Find technical specifications needed to electronically transmit data to ACE, including PGA data, along with supplementary guidance.

[www.cbp.gov/ace-technical](http://www.cbp.gov/ace-technical)



## FAQs

Answers to some of our most frequent questions on: ACE Portal, manifest filings, cargo release and more.

[www.cbp.gov/ace-faqs](http://www.cbp.gov/ace-faqs)

[www.cbp.gov/ace](http://www.cbp.gov/ace)



# Questions?



ACE.Support@cbp.dhs.gov  
1-866-530-4172

Office of Trade  
U.S. Customs and Border Protection

 @CBPTradeGov



Office of Trade

# Automated Commercial Environment (ACE) Reports Update for Trade Users

WESCCON  
October 8, 2022



U.S. Customs and  
Border Protection

# Agenda



- Demonstration of ACE Reports
- References and Resources
- Questions and Answers





# ACE Reports Demonstration





# Launching ACE Reports from the Accounts Tab

ACE Secure Data Portal

ace secure data portal U.S. Customs and Border Protection

Welcome, Jeffrey Enterprise!

Home Accounts References Tools

**Task Selector**

Select Account Type  
View: Broker GO

Select Task  
[Accounts](#)  
[Change History](#)  
**Reports**  
[BAL](#)  
[Action Plan](#)  
[Statements](#)  
[LPCs](#)  
[Declarations](#)  
[Mode of Communication](#)

**Account Selector List**

View Settings  
Sort by: --Select-- GO

**Accounts**

- CBP Incorporated

**Broker Summary**

Name: CBP Incorporated ACE ID: 0005676506

**Launch Reports and Quickview Tool**

Click the launch button to access ACE Reports, which allows you to run, modify, schedule and print standard public reports as well as customized ad hoc reports.

Launch Tool





# ACE Reports Home Tab – Updates and Tips Panel



U.S. Customs and Border Protection

Welcome: **JE727770** | Applications ▾ | Preferences | Help menu ▾ | Log off

Home Documents

## ACE REPORTS

Role: **Broker** | Account ID: **0005676506**

Search Workspaces:

Available Workspaces	Info
Trade	
Broker	
Training	
Training	

### Updates

- 08/16/2019 - Updated PGA-101 report now available
- 01/01/2021 - Bond New universe now available to Importers & Sureties
- 01/01/2021 - Cargo Release New universe now available to Brokers & Importers
- 01/01/2021 - Entry Summary New universe now available to Brokers & Importers
- 01/01/2021 - Drawback New universe now available to Brokers & Importers
- 01/01/2021 - Trade Remedy New universe now available to Brokers & Importers
- 01/01/2021 - Liquidation New universe now available to Brokers & Importers
- 01/01/2021 - Liquidation Bulletin New universe now available to Brokers & Importers
- 01/01/2021 - Protest New universe now available to Protest Filers
- 01/01/2021 - Reconciliation New universe now available to Brokers & Importers
- 01/01/2021 - In-Bond New universe now available to Carriers

### Tips

#### Scheduling a Report

To schedule a report, once you've set up your query parameters in the **Query Panel**, select the button in the top-right for **Close** and then choose **Apply Changes and Close** (Note: This will cause any data already returned by the report to be cleared out). Save a copy of the report in your personal folder, then go to the **Documents** tab, right click the saved report and select **Schedule**. For quick overview, watch: [ACE Reports Video 11 - Scheduling a Recurring Report \(Caption File\)](#)



- Create Ad Hoc Report
- View ACE Reports Training Resources

**Need Assistance?** The ACE Reports team can be reached at [ace.reports@cbp.dhs.gov](mailto:ace.reports@cbp.dhs.gov)

100%





# Steps to Access the New Workspace Home Tab

The screenshot shows the SAP Preferences dialog box for user JE727770. The 'General' tab is selected in the left-hand menu. The 'Use Default Settings (Administrator defined)' checkbox is unchecked. Under 'Set BI launch pad start page:', the 'Home tab' radio button is selected. The 'Select Home tab:' radio button is also selected, and the 'Browse Home Tab' button is highlighted. The 'ACE Reports Home Page' is entered in the text field below. Under 'Documents tab', the 'My Documents' radio button is selected. The 'Choose Columns to Display on Documents Tab:' section has several checkboxes checked: Type, Last Run, Instances, Description, Created By, Created On, Location (Categories), Received On (Inbox), and From (Inbox). The 'Set document viewing location:' section has the 'In the BI launch pad portal as tabs' radio button selected. The 'Save', 'Save & Close', and 'Cancel' buttons are at the bottom right. Four blue arrows point to the 'Preferences' link at the top right (1), the 'General' tab in the left menu (2), the 'Home tab' radio button (3), and the 'Browse Home Tab' button (4).

1. Click on the "Preferences" Hyperlink at the top of the screen.

2. From the "General" tab, uncheck the box next to "Use Default Settings (Administrator defined)"

3. Select the "Home Tab" and "Select Home tab:" radio buttons.

4. Click on the "Browse Home Tab" button.

## [Adding the ACE Report Workspace to the Home Tab](#)



# Steps to Access the New Workspace Home Tab (Cont.)



Welcome: JE727770 | Applications ▾ | Preferences ▾ | Help menu ▾ | Log off

Home Documents

Select a Custom Home tab

My Documents

Folders

- Public Folders
  - ACE
    - ACE Home
    - Trade Workspaces
    - Training
    - Shared Reports

Title	Type
ACE Reports Home Page	Module

8.

Open Cancel

100%

## To switch from the legacy Home Tab to the New Workspace Home Tab (Cont'd):

- 5. click on the [+] next to “Public Folders” and on “ACE”
- 6. Double click on the “ACE Home” folder
- 7. Highlight “ACE Reports Home Page”
- 8. Single click on “Open”
- 9. Select the “Save & Close” button on the “Preferences” page.

[Adding the ACE Reports Workspace View to the Home Tab](#)





# Additional Settings in Preferences Menu

Preferences – JE727770

▼ Preferences

- General
- Change Enterprise Password
- Locales and Time Zone
- Analysis edition for OLAP
- Web Intelligence**
- BI workspaces
- Crystal Reports

### Web Intelligence

View

- HTML (no download required)
- Applet (download required)
- Desktop (Rich Client, Windows only, installation required)
- PDF

---

Modify (creating, editing and analyzing documents):  
This is also the interface launched from the Go To list or My Applications shortcut.

- HTML (no download required)
- Applet (download required)
- Desktop (Rich Client, Windows only, installation required)

Select a default universe:  
No default universe

---

When viewing a document:

- Use the document locale to format the data
- Use my preferred viewing locale to format the data

---

Drill options:

- Prompt when drill requires additional data
- Synchronize drill on report blocks
- Hide Drill toolbar on startup

Start drill session:

- On duplicate report
- On existing report

---

Select a priority for saving to MS Excel:

- Prioritize the formatting of the documents
- Prioritize easy data processing in Excel





# Import ACE Reports

Home Documents Loading... [min] [max]

**Cargo Release**

Navigation List

- Reports
  - CR-004 Cargo Release Line Details
  - CR-005 Cargo Release Entry Details
  - CR-009 Cargo Release Entry Status

Home Documents Loading... [min] [max]

**Harmonized Tariff Schedule**

Navigation List

- Reports
  - REF-001 PGA HTS Flags and Program Codes
  - REF-002 USDA/AMS HTS Fees
  - REF-003 PGA HTS Code Jurisdiction

Home Documents Loading... [min] [max]

**Entry Summary**

Entry Summary New

Navigation List

- Reports
  - ES-001 Entry Summary Header Details
  - ES-002 Entry Summary Line Details
  - ES-003 Entry Summary Line Tariff Details
  - ES-004 Rejected and Cancelled Entry Summaries
  - ES-005 Late Filed Entry Summaries
  - ES-006 Entry Summary Dimensions by Value
  - ES-007 Warehouse Entry Summaries Without Final Withdrawal
  - ES-008 TIB Expiration Notice
  - ES-009 Warehouse Entry Summary Alert
  - ES-010 Future Liquidations
  - ES-011 Unpaid Entries
  - ES-012 Entry Summary Census Warning and Override
  - ES-013 CBP Form 28, 29, 4647 Status Report
  - ES-019 Trade Remedy Tranches 3 and 4A





# Import ACE Reports (Cont.)

Home Documents Loading... [icon] [icon]

Cargo Release New Cargo Release Deferred Tax Bills Harmonized Tariff Schedule **Entry Summary**

Entry Summary New Entry Summary **ADCVD Entries** ADCVD Reference Drawback New Drawback Liquidation

Navigation List

- Reports
  - ES-109 ADCVD Entry Summary Liquidation

---

Home Documents Loading... [icon] [icon]

Entry Summary

ADCVD Reference

Navigation List

- Reports
  - REF-202 ADCVD Active Case Details
  - REF-207 ADCVD Active Cases by Principal Case Number

---

Home Documents Loading... [icon] [icon]

Entry Summary

Drawback

Navigation List

- Reports
  - ES-601 Drawback Claim Details

---

Home Documents Loading... [icon] [icon]

Entry Summary Statements PGA M

Liquidation

Navigation List

- Reports
  - ES-701 Courtesy Notice of Liquidation
  - ES-702 Official Notice of Extension, Suspension and Liquidation
  - ES-704 TIB Closure





# Import ACE Reports (Cont.)

Home Documents Loading... [icon] [icon]

Entry Summary

Reconciliation

Navigation List

- Reports
  - ES-501 Recon No-Files
  - ES-503 Reconciliation Entry Summaries
  - ES-504 Associated Entry Summaries
  - ES-505 Reconciliation Entry Summary Amounts
  - ES-506 Reconciliation Line Item Transmitted Data
  - ES-507 Reconciliation Line Item HTS Details

Home Documents Loading... [icon] [icon]

Entry Summary

Trade Remedy

Navigation List

- Reports
  - 232 Reports
    - TR-001 Section 232 Aluminum
    - TR-002 Section 232 Steel
    - TR-003 Section 232 In-Transit Entries
  - 301 Reports
    - TR-004 Section 301 Totals
    - TR-005 Section 301 Details
  - 201 Reports
    - TR-006 Section 201 Totals
    - TR-007 Section 201 Details





# Import ACE Reports (Cont.)

Home Documents Loading... [min] [max]

ISF

Navigation List

- Reports
  - ISF Late Report
  - ISF Progress Report
  - ISF History Report

Home Documents Loading... [min] [max]

ITRAC

Navigation List

- Reports
  - ITRAC - 002 Cargo Release Details
  - ITRAC - 003 Entry Summary Header
  - ITRAC - 004 Entry Summary Line Details
  - ITRAC - 005 Entry Summary Line Tariff Details
  - ITRAC - 006 Exam Details
  - ITRAC - 007 Reconciliation Header
  - ITRAC - 008 Reconciliation Details

Home Documents Loading... [min] [max]

PGA Message Set

Navigation List

- Reports
  - PGA-101 PGA Message Set





# Import ACE Reports (Cont.)

Home Documents Loading...

Revenue

**Bills**

▼ Navigation List

Reports

- REV - 405 Trade Open Bills

Home Documents Loading...

Revenue

**Deferred Tax Bills**

▼ Navigation List

Navigation List

- REV - 307 Deferred Tax Consolidated Open Unpaid
- REV - 308 Deferred Tax Entry Bill

Home Documents Loading...

Revenue

**Statements**

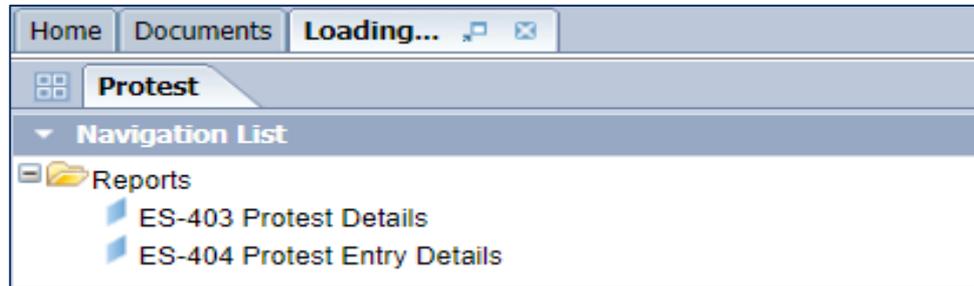
▼ Navigation List

Reports

- REV-101 Monthly Statement Overview
- REV-102 Daily Statement Overview
- REV-103 Periodic Daily Statement Entry Summary List



# ACE Protest Reports



# ACE Export Reports



# Documents Tab



Welcome: **JE727770** | Applications ▾ | Preferences | Help menu ▾ | Log off

Home Documents Loading...  View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ Details  1 of 1

My Documents  
Folders  
Recycle Bin  
Search

## Search Results

No Items

Total: 0 Items

The list panel is updated.

100%





# My Documents Drawer



Welcome: JE727770 | Applications | Preferences Help menu | Log off

Home Documents

View | New | Organize | Send | More Actions | Details

1 of 1+

- My Documents
- My Favorites
- Inbox
- My Alerts
- Subscribed Alerts
- Personal Categories
- Folders
- Recycle Bin
- Search

Title	Type	Last Run	Instances	Description	Created By	Created On
AdhocTemp	Folder			Temp folder automatically created for adho	JE727770	Jul 19, 2017 2:32 PM
Carlops Folder	Folder				JE727770	Jun 27, 2019 1:58 PM
Carlos R	Folder				JE727770	Dec 2, 2021 4:55 PM
Carlos Rodriguez Folder	Folder				JE727770	Jul 19, 2017 3:55 PM
Eric Folder	Folder				JE727770	Jun 27, 2019 1:56 PM
05112021	Web Intelligence		0		JE727770	May 11, 2021 1:13 PM
06 23 2021 - PGA HTS INFO	Web Intelligence		0		JE727770	Jun 23, 2021 3:34 PM
AES Modified Report 05 12 2021	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	May 12, 2021 12:55 PM
AES TEST 05 12 2021	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	May 12, 2021 12:35 PM
AES-201 Dynamic Dates 05 12 2021	Web Intelligence	May 12, 2021 1:11 PM	1	AES-201 Filer Report Provides export transa	JE727770	May 12, 2021 1:05 PM
AES-201 Filer Transactions	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Oct 5, 2017 11:16 AM
AES-201 Filer Transactions 12 31 2021	Web Intelligence	Jan 2, 2022 12:25 PM	1	AES-201 Filer Report Provides export transa	JE727770	Jan 2, 2022 12:10 PM
AES-201 Filer Transactions Demo	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Jun 29, 2021 3:31 PM
AES-201 Filer Transactions Demo WITH ITN filter	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Jun 29, 2021 3:38 PM
AES-201 Filer Transactions MODIFIED	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Jul 19, 2022 1:07 PM
AES-201 Filer Transactions Report for Demo 06 29 2021	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Jun 29, 2021 11:51 AM
AES-201 Filer Transactions Report for Demo 06 29 2021 [1]	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Jun 29, 2021 11:56 AM
AES-201 Filer Transactions with ITN #	Web Intelligence		0	AES-201 Filer Report Provides export transa	JE727770	Jan 2, 2022 12:18 PM
AM-100 Courtesy Notice of Liquidation	Web Intelligence		0		JE727770	Jul 31, 2017 8:50 AM
AM-100 Courtesy Notice of Liquidation patt2	Web Intelligence		0		JE727770	Oct 13, 2017 6:55 PM
Cargo Release Cancelled Report	Web Intelligence		0	Cargo Release Cancelled Report	JE727770	Aug 8, 2017 7:48 PM
Carlos Rodriguez Modified Report 05 11 2021	Web Intelligence		0		JE727770	May 11, 2021 12:34 PM
Carlos Rodriguez's Report 05 11 2021	Web Intelligence	May 11, 2021 1:17 PM	1		JE727770	May 11, 2021 11:59 AM
CR-004 Cargo Release Line Details	Web Intelligence		0		JE727770	Oct 15, 2019 4:16 PM
CR-004 Cargo Release Line Details WESCCON	Web Intelligence		0		JE727770	Oct 13, 2017 1:36 PM
CR-009 Cargo Release Entry Status wescon2	Web Intelligence		0		JE727770	Oct 13, 2017 3:16 PM
ES-001 Entry Summary Header Details	Web Intelligence		0		JE727770	Oct 15, 2019 12:56 PM
ES-001 Entry Summary Header Details - eEMPTY TE,PLATE	Web Intelligence	Jun 27, 2019 2:19 PM	2		JE727770	Jun 27, 2019 2:10 PM
ES-001 Entry Summary Header Details 7 23 2019	Web Intelligence	Mar 25, 2022 7:40 PM	13		JE727770	Jul 23, 2019 11:04 AM
ES-001 Entry Summary Header Details dATE oBJECTS	Web Intelligence	Mar 8, 2022 12:51 PM	13		JE727770	Nov 8, 2019 12:47 PM
ES-001 Entry Summary Header Details Report to Demo Change S	Web Intelligence		0		JE727770	Nov 8, 2019 12:28 PM
ES-001 Entry Summary Header Details Report to Demo Change S	Web Intelligence		0		JE727770	Jun 21, 2021 10:18 PM
ES-001 Entry Summary Header Details Report to Demo Change S	Web Intelligence		0		JE727770	Jun 21, 2021 10:17 PM
ES-001 Entry Summary Header Details WESCCON	Web Intelligence		0		JE727770	Oct 19, 2018 2:44 PM
ES-001 Entry Summary Header Details WESCCON - E	Web Intelligence		0		JE727770	Oct 19, 2018 2:44 PM

Total: 50+ items



# Folders Drawer



Welcome: BV081dd | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View New Organize Send More Actions Details

My Documents

Folders

- Public Folders
  - ACE
    - ACE Home
    - Trade Workspaces
    - Training
    - Shared Reports

Recycle Bin

Search

Title ^	Type	Last Run	Instances
ACE	Folder		

Total: 1 items





# Shared Reports Folder

My Documents

Folders

- Public Folders
  - ACE
    - ACE Home
    - Trade Workspaces
    - Training
    - Shared Reports

Search

Title	Type	Last Run	Instances
ACE	Folder		

Total: 1 items





# Recycle Bin Drawer

U.S. Customs and Border Protection

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading... [Close]

View | New | Organize | Send | More Actions | Details

1 of 1

My Documents

- Folders
- Recycle Bin
- Search

Search Results

No Items

Total: 0 items

The list panel is updated.

100%



# Search Drawer



Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View New Organize Send More Actions

Details

1 of 1

- My Documents
- Folders
- Recycle Bin
- Search

### Search Results

No Items

Total: 0 items

The list panel is updated.

100%





# Running Canned ACE Reports





# How to Run a Canned ACE Report

1. Launch the appropriate ACE canned report.
  2. The report prompts box will display, please complete any of the available date prompts and remember to enter your Importer of Record number (if an importer is running the report) and/or Filer Code (if a broker is running the report) for faster report processing.
  3. Run the report and wait for the data results to return and display.
  4. When your report returns results, please save your canned ACE report to your “**My Favorites**” folder in the “**My Document**” drawer to rerun, access and/or schedule the report later.
  5. You can also export the results of the report to an external application file in the .pdf, .xls, .xlsx, .csv or .txt formats.
- ❖ Videos to watch to review the steps above:
- [Running a Standard Report](#)
  - [Saving and Exporting a Report](#)





# REF-001 PGA HTS Flags and Program Codes Report



## REF-001 PGA HTS Flags and Program Codes

FOR OFFICIAL USE ONLY UNLESS OTHERWISE AUTHORIZED

NO DATA FOUND

### Report Parameters:

Include Expired Records: ALL	HTS Number - Full: ALL	PGA Name Code: ALL
PGA Flag Code: ALL	PGA Program Code: ALL	HTS Number - First 2: ALL
HTS Number - First 4: ALL	HTS Number - First 6: ALL	HTS Number - First 8: ALL
Effective Begin Date Greater than: ALL	Effective End Date Less than: ALL	

PGA Name Code	PGA Flag Code	PGA Flag	PGA Program Code	HTS Number - Full	HTS Long Description	Effective Begin Date	Effective End Date	HTS Update Date





# REF-001 PGA HTS Flags and Program Codes

Prompts

Available prompt variants

Prompts Summary	
<input checked="" type="checkbox"/>	* Include Expired Records <b>N</b>
<input checked="" type="checkbox"/>	HTS Number - Full <b>2712100000</b>
<input checked="" type="checkbox"/>	PGA Name Code
<input checked="" type="checkbox"/>	PGA Flag Code
<input checked="" type="checkbox"/>	PGA Program Code
<input checked="" type="checkbox"/>	HTS Number - First 2
<input checked="" type="checkbox"/>	HTS Number - First 4
<input checked="" type="checkbox"/>	HTS Number - First 6
<input checked="" type="checkbox"/>	HTS Number - First 8
<input checked="" type="checkbox"/>	Effective Begin Date Greater than
<input checked="" type="checkbox"/>	Effective End Date Less than

\* Required prompts

Include Expired Records

Type values here

Y

N





# REF-001 PGA HTS Flags and Program Codes



## REF-001 PGA HTS Flags and Program Codes

FOR OFFICIAL USE ONLY UNLESS OTHERWISE AUTHORIZED

Report Parameters:

Include Expired Records: N	HTS Number - Full: 2712100000	PGA Name Code: ALL
PGA Flag Code: ALL	PGA Program Code: ALL	HTS Number - First 2: ALL
HTS Number - First 4: ALL	HTS Number - First 6: ALL	HTS Number - First 8: ALL
Effective Begin Date Greater than: ALL	Effective End Date Less than: ALL	

PGA Name Code	PGA Flag Code	PGA Flag	PGA Program Code	HTS Number - Full	HTS Long Description	Effective Begin Date	Effective End Date	HTS Update Date
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS1	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS1	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS2	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	ALL	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	BIO	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	COP	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	COS	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	DEV	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	DRU	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019
FDA	FD1	FDA CLEARANCE MAY BE REQUIRED	FDA	2712100000	PETROLEUM JELLY, WHETHER OR NOT COLORED	2/16/2003	12/31/2039	8/4/2019

Main Report | Parameters





# Saving and Exporting ACE Report Data



Welcome: JE727770 | Applications | Preferences Help menu | Log off

Home Documents REF-001 PGA HTS Flags a...  
Cargo Release New Cargo Release Deferred Tax Bills Harmonized Tariff Schedule Entry Summary Statements PGA Message Set ITRAC New ITRAC

Viewer  
Web Intelligence | Save | Save As | Track | Drill | Filter Bar | Freeze | Outline | Reading | Design



## REF-001 PGA HTS Flags and Program Codes

FOR OFFICIAL USE ONLY UNLESS OTHERWISE AUTHORIZED

Report Parameters:

Include Expired Records: N	HTS Number - Full: 2712100000	PGA Name Code: ALL
PGA Flag Code: ALL	PGA Program Code: ALL	HTS Number - First 2: ALL
HTS Number - First 4: ALL	HTS Number - First 6: ALL	HTS Number - First 8: ALL
Effective Begin Date Greater than: ALL	Effective End Date Less than: ALL	



Welcome: JE727770 | Applications | Preferences Help menu | Log off

Home Documents REF-001 PGA HTS Flags a...  
Cargo Release New Cargo Release Deferred Tax Bills Harmonized Tariff Schedule Entry Summary Statements PGA Message Set ITRAC New ITRAC

Viewer  
Web Intelligence | REF-001 PGA HTS Flags and Program Codes | Freeze | Outline | Reading | Design

Report Parameters:

Include Expired Records: N	HTS Number - Full: 2712100000
PGA Flag Code: ALL	PGA Program Code: ALL
HTS Number - First 4: ALL	HTS Number - First 6: ALL
Effective Begin Date Greater than: ALL	Effective End Date Less than: ALL

**Export**

Select

- Reports
- Data

Select All  
 Main Report  
 Parameters

File Type: PDF

Current Report  
 All pages  
 Current Page  
 Page(s)

OK Cancel

PGA Name Code	PGA Flag Code	PGA Flag	PGA Program Code	HTS Number - Full	HTS L
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS1	2712100000	PETRC WHET COLOI
EPA	EP7	EPA(TSC) TSCA DATA MAYBE REQD	TS1	2712100000	PETRC WHET COLOI
		EPA(TSC) TSCA DATA			PETRC WHET



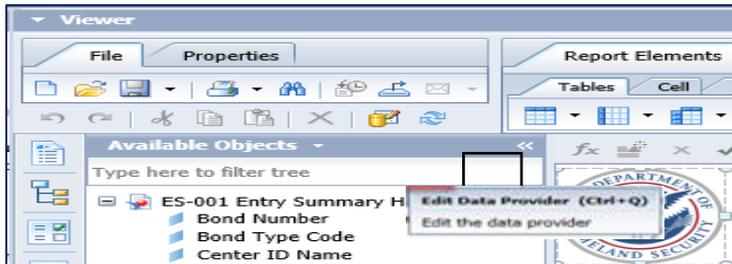


# Modifying a Canned ACE Report



# How to Modify an ACE Canned Report

1. Launch the appropriate ACE Report.
2. Allow the report prompts box to display, click on the **“Cancel”** button to display an empty report in **“Reading”** mode.
3. From the report’s main toolbar, click on the **“Design”** button to switch view modes.
4. Once **“Design”** mode is displayed, click on the **“Edit Data Provider”** icon.



5. The **“Query Panel”** displays providing access to all data objects in the report’s universe and the ability to choose which data objects to display in the results and what to filter the by.
6. Add any desired data object by dragging them to the **“Results Objects”** panel.
7. You can search by data object name or key word in the **“Universe Outline”**.

8. Add Filter conditions to the **“Query Filters”** panel
    - Add or Remove data filter objects 
    - Limit or add a combination or set of conditions
  9. Add date parameters (unless date objects are used) and the Importer of Record number (if an importer is running the report) and/or Filer Code (if a broker is running the report) for faster report processing. Run the report and wait for the data results to display.
  10. Click on the **“Run Query”** button to obtain report data
  11. After results return, do not forget to drag added data objects from the **“Available Objects”** panel to the report table with results in the order you wish the results to display.
  12. Save the modified report to your **“My Favorite”** folder for future use and to schedule it next time.
- ❖ Videos to watch to review the steps above:
- [Modifying the Result Objects of a Report](#)
  - [Modifying Query Filters](#)
  - [Modifying Display of a Report](#)



# Modifying an ACE Canned Report

U.S. Customs and Border Protection

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading... |

Cargo Release | Cargo Release New | **Entry Summary** | Harmonized Tariff Schedule | ITRAC | Statements | Revenue |

Entry Summary | ADCVD | ADCVD Reference | Drawback | Liquidation | Reconciliation | Trade Remedy |

Navigation List | Viewer

Web Intelligence | Track | Drill | Filter Bar | Freeze | Outline

Navigation Map

ES-013  
CBP Form 28, 29, 4647 Status Report

FOR OFFICIAL USE ONLY

NO DATA FOUND

Report Parameters:

Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: ALL
Notice Status Code: ALL	Filer Code: ALL	Importer Number: ALL

Prompts

Importer Number	Notice Type Code

Available prompt variants

Prompts Summary

- Notice Type Code 28,29,46
- Due Date (Begin)
- Due Date (End)
- Notice Status Code
- Notice Date (Begin)
- Notice Date (End)
- Filer Code
- Entry Summary Number
- Entry Type Code
- Port of Entry Code
- Importer Number

Notice Type Code (optional)

Type values here

Refresh Values

To see the content of the list, click the Refresh values button.

28  
29  
46

OK Cancel

→Step 1.

Step 2.

1. Click the “Cancel” button in the *Prompts* box
2. Switch to “Design” mode.

Main Report | Parameters

Track changes: Off | Page 1 of 1 | 100% | 233 days ago





# Modifying an ACE Canned Report (Cont.)

U.S. Customs and Border Protection

Welcome: JE727770 | Applications | Preferences Help menu | Log off

Home Documents Loading...

Cargo Release Cargo Release New Entry Summary Harmonized Tariff Schedule ITRAC Statements

Entry Summary ADCVD ADCVD Reference Drawback Liquidation Reconciliation Trade Remedy

Navigation List

Viewer

File Properties Report Elements Formatting Data Access Analysis Page Setup

Tables Cell Section Comment Chart Custom Element Tools Position Linking

Navigation Map

ES-013 CBP Form 28, 29, 4647 Status R

Main Report Parameters

FOR OFFICIAL USE ONLY

ES-013  
CBP Form 28, 29, 4647 Status Report

NO DATA FOUND

Report Parameters:

Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: ALL
Notice Status Code: ALL	Filer Code: ALL	Importer Number: ALL

Importer Number	Notice Type Code	Trade Response Due Date	Status	Port of Entry Code	Filer Code	Entry Summary Number	Entry Type Code	Notice Date	Trade Response Date	Notice Issuing Team

Step 1.

1. Click on the “Edit Data Provider” icon to open the Query Panel editor.

Main Report Parameters

Track changes: Off Page 1 of 1 100% 275 days ago

# Review of the Query Panel Editor & Features to Modify an ACE Canned Reports



The screenshot displays the 'Query Panel Editor' interface. The 'Query Filters' section is active, showing a filter for 'Action Status Code' with a sub-filter for 'Port of Entry'. A dropdown menu is open for 'Port of Entry', listing various comparison operators. The 'In List' operator is selected. A secondary dropdown menu is also visible, listing options like 'Constant', 'Value(s) from list', and 'Prompt'. The 'Run Query' button is highlighted in the top right corner.

**Query Filters**

- Action Status Code
  - Port of Entry: In List (selected)

**Comparison Operators (Dropdown Menu):**

- Equal to
- Not Equal to
- Between
- Not Between
- Matches pattern
- Different from pattern
- Greater than
- Greater than or Equal to
- Less than
- Less than or Equal to
- In List** (checked)
- Not In List

**Secondary Dropdown Menu:**

- Constant** (checked)
- Value(s) from list
- Prompt
- Object from this query
- Result from another query

**Run Query** (highlighted)



# Running the Query After Modifying an ACE Canned Report



U.S. Customs and Border Protection

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading... | Cargo Release Statements Entry Summary Harmonized Tariff Schedule

Entry Summary ADCVD Liquidation ADCVD Reference Reconciliation Drawback Trade Remedy

File Properties Report Elements Formatting Data Access Analysis Page Setup

Tables Cell Section Comment Chart Tools Position Linking

FOR OFFICIAL USE ONLY

**ES-013**  
**CBP Form 28, 29, 4647 Status Report**

NO DATA FOUND

Report Parameters:

Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: ALL
Notice Status Code: ALL	Filer Code: ALL	Importer Number: ALL

Importer Number	Notice Type Code	Trade Response Due Date	Status	Port of Entry Code	Filer Code	Entry Summary Number	Entry Type Code	Notice Date	Trade Response Date	Notice Issuing Team

**Prompts**

Available prompt variants

Prompts Summary

- Notice Type Code 28;29;46
- Due Date (Begin)
- Due Date (End)
- Notice Status Code
- Notice Date (Begin)
- Notice Date (End)
- Filer Code
- Entry Summary Number
- Entry Type Code
- Port of Entry Code
- Importer Number

Notice Type Code (optional)

Type values here

Refresh Values

28  
29  
46

OK Cancel

1. Complete "Prompts"





# Dragging Objects to the Modified ACE Report after Editing the Query Panel

SAP

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading... | Cargo Release | Entry Summary | Statements | Reference

Entry Summary | ADCVD | Liquidation | ADCVD Reference | Reconciliation

Viewer

File Properties | Report Elements | Formatting | Data Access | Analysis | Page Setup

Tables | Cell | Section | Chart | Other | Tools | Position | Linking

Available Objects

Type here to filter tree

- ES-013 CBP Form 28, 29, 4647 Status Report
  - Entry Summary Number
  - Entry Type Code
  - Filer Code
  - Importer Number
  - Notice Date
  - Notice Issuing Team
  - Notice Status
  - Notice Status Code
  - Notice Type Code
  - Port of Entry Code
  - Post Summary Correction Indicator
  - Trade Response Date
  - Trade Response Due Date
  - Variables

FOR OFFICIAL USE ONLY

**ES-013**  
**CBP Form 28, 29, 4647 Status Report**

**NO DATA FOUND**

Report Parameters:

Notice Dates Between: ALL to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Due Dates Between: ALL to ALL	Entry Summary Number: ALL	Notice Type Code: 28;29;46
Notice Status Code: ALL	Filer Code: YO5	Importer Number: ALL

Importer Number	Notice Type Code	Trade Response Due Date	Post Summary Correction Indicator	Status	Port of Entry Code	Filer Code	Entry Summary Number	Entry Type Code	Notice Date	Trade Response Date	Notice Issuing Team

1. Insert the newly added data objects to the report table. (Do not forget about this step. 😊)

Main Report | Parameters

Track changes: Off | Page 1 of 1 | 100% | 1 minute ago



# Using a Dynamic Dates Range on a Modified ACE Report



U.S. Customs and Border Protection

Welcome: Carlos Rodriguez | Applications | Preferences | Help menu | Log off

Home Documents ES-013 CBP Form 28, 29,...

Cargo Release New Cargo Release Deferred Tax Bills Harmonized Tariff Schedule **Entry Summary** Statements PGA Message Set ITRAC New ITRAC

Entry Summary New Entry Summary ADCVD Entries ADCVD Reference Drawback New Drawback Liquidation New Liquidation Reconciliation New Reconciliation Trade Remedy New Trade Remedy

Navigation List

- Reports
  - ES-001 Entry Summary Header Details
  - ES-002 Entry Summary Line Details
  - ES-003 Entry Summary Line Tariff Details
  - ES-004 Rejected and Cancelled Entry Summaries
  - ES-005 Late Filed Entry Summaries
  - ES-006 Entry Summary Dimensions by Value
  - ES-007 Warehouse Entry Summaries Without Fin
  - ES-008 TIB Expiration Notice
  - ES-009 Warehouse Entry Summary Alert
  - ES-010 Future Liquidations
  - ES-011 Unpaid Entries
  - ES-012 Entry Summary Census Warning and Ove
  - ES-013 CBP Form 28, 29, 4647 Status Report**
- Validation Activity
  - Type here to filter on ti
  - Validation Activity [unx]
    - Validation Activity
    - Targeting
    - ATS Inbox
    - Date Objects

Viewer

Query Panel

Add Query

Run Query Close

Result Objects

- Action Type Code
- Trade Response Due Date
- Action Status Code
- Action Entry Summary Port Code
- Action Entry Summary Number
- Action Create Date
- Trade Response Date
- CBP Officer Team Number
- Action Entry Summary Importer Number
- Action Entry Summary Filer Code
- Action Status
- Action Entry Summary Type Code

Query Filters

AND

- Action Type Code In List Notice Type Code
- Trade Response Due Date Between Due Date (Begin) And Due Date (End)
- Action Status Code In List Notice Status Code
- Action Create Date Between Notice Date (Begin) And Notice Date (End)
- Action Entry Summary Filer Code In List Filer Code
- Action Entry Summary Number In List Entry Summary Number
- Action Entry Summary Type Code In List Entry Type Code
- Action Entry Summary Port Code In List Port of Entry Code
- Action Entry Summary Importer Number In List Importer Number

Query 1

[Adding Dynamic Dates to ACE Reports](#)





# Using a Dynamic Date Range on a Modified ACE Report (Cont.)

Action Create Date Between ▾ Pick an object And Notice Date (End)

**Objects and variables**

Available objects and variables:

- [-] Date Objects
  - X Days Ago (Begin)
  - X Days Ago (End)
  - Today
  - Yesterday
  - 7 Days Ago
  - Current Week Begin
  - Current Week End
  - Previous Week Begin
  - Previous Week End
  - Current Month Begin
  - Current Month End
  - Previous Month Begin
  - Previous Month End
  - Current Quarter Begin
  - Current Quarter End
  - Previous Quarter Begin
  - Previous Quarter End
  - Current Year Begin (Calendar)
  - Current Year End (Calendar)
  - Current Year Begin (Fiscal)

OK Cancel

Constant

Value(s) from list

Prompt

Object from this query

Result from another query

Constant

Value(s) from list

Prompt

Object from this query

Result from another query





# Scheduling an ACE Report





# Steps to Schedule an ACE Report

SAP | Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading... | View | New | Organize | Send | More Actions | Details

Title ^	Type	Last Run	Instances	Description	Created By	Created On
AdhocTemp	Folder			Temp folder automatically created for adho	JE727770	Jul 19, 2017 2:32 PM
Carlos Rodriguez Folder	Folder				JE727770	Jul 19, 2017 3:55 PM
AES-201 Filer Transactions	Web Intelligence		1	AES-201 Filer Report Provides export trans	JE727770	Oct 5, 2017 11:16 AM
AM-100 Courtesy Notice of Liquidation	Web Intelligence		15		JE727770	Jul 31, 2017 8:50 AM
AM-100 Courtesy Notice of Liquidation patt2	Web Intelligence		2		JE727770	Oct 13, 2017 6:55 PM
Cargo Release Cancelled Report	Web Intelligence		0	Cargo Release Cancelled Report	JE727770	Aug 8, 2017 7:48 PM
ES-002 Entry Summary Line Details	Web Intelligence		0		JE727770	Jun 6, 2018 12:36 PM
ES-701 Courtesy Notice of Liquidation for Scheduling	Web Intelligence		0		JE727770	Jul 10, 2018 8:34 AM
ESM-7025 CBP Form 28, 29, 4647 Status Report	Web Intelligence		0	This report allows importers to query the st	JE727770	Aug 8, 2017 8:11 PM
ESM-7025 CBP Form 28, 29, 4647 Status Report Patti	Web Intelligence		2	This report allows importers to query the st	JE727770	Oct 13, 2017 6:48 PM

SAP | Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading... | View | New | Organize | Send | More Actions | Details

Title ^	Type	Last Run	Instances	Description	Created By	Created On
AdhocTemp	Folder			Temp folder automatically created for adho	JE727770	Jul 19, 2017 2:32 PM
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AES-201 Filer Transactions	Web Intelligence		1	AES-201 Filer Report Provides export trans	JE727770	Oct 5, 2017 11:16 AM
AM-100 Courtesy Notice of Liquidation	Web Intelligence		15		JE727770	Jul 31, 2017 8:50 AM
AM-100 Courtesy Notice of Liquidation patt2	Web Intelligence		2		JE727770	Oct 13, 2017 6:55 PM
Cargo Release Cancelled Report	Web Intelligence		0	Cargo Release Cancelled Report	JE727770	Aug 8, 2017 7:48 PM
ES-002 Entry Summary Line Details	Web Intelligence		0		JE727770	Jun 6, 2018 12:36 PM
ES-701 Courtesy Notice of Liquidation for Scheduling	Web Intelligence		0		JE727770	Jul 10, 2018 8:34 AM
ESM-7025 CBP F... Report	Web Intelligence		0	This report allows importers to query the st	JE727770	Aug 8, 2017 8:11 PM
ESM-7025 CBP F... Report Patti	Web Intelligence		2	This report allows importers to query the st	JE727770	Oct 13, 2017 6:48 PM

Context menu for ES-701 Courtesy Notice of Liquidation for Scheduling:

- View
- Properties
- Modify
- Schedule
- Mobile Properties
- History
- Categories
- Document Link
- New >
- Organize >
- Send >
- Details

## Scheduling an ACE Report





# Scheduled Report Settings

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title  
ES-701 Courtesy Notice of Liquidation for Scheduling

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

**Recurrence**

Run object: Now

Object will run now.

Now  
Once  
Hourly  
Daily  
Weekly  
Monthly  
Nth Day of Month  
1st Monday of Month  
Last Day of Month  
X Day of Nth Week of the Month  
Calendar

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

**Prompts**

Modify values for: ES-701 Courtesy Notice

Entry Date (Begin)  
Entry Date (End)  
Liquidation Date (Begin)  
Liquidation Date (End)  
Liquidation Status  
Entry Summary Number  
Importer Number  
Filer  
Liquidation Basis  
Liquidation Duty Determination  
Control Team CEE  
Team Number  
Port of Entry Code

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

**Formats**

Output Format

Web Intelligence

Microsoft Excel

Adobe Acrobat

Comma Separated Values(CSV)

Plain Text

Schedule – ES-701 Courtesy Notice of Liquidation for Scheduling

▼ Schedule

Instance Title

Recurrence

Prompts

Formats

Caching

Events

Scheduling Server Group

Destinations

**Destinations**

Destination:  
Email

Keep an instance in the history

Use default settings

From: Add Placeholder

To: Add Placeholder

Cc: Add Placeholder

Bcc: Add Placeholder

Subject: Add Placeholder

Message:

Add Placeholder

Add Attachment

File Name:

Use Automatically Generated Name

Use Specific Name

Add File Extension

Schedule

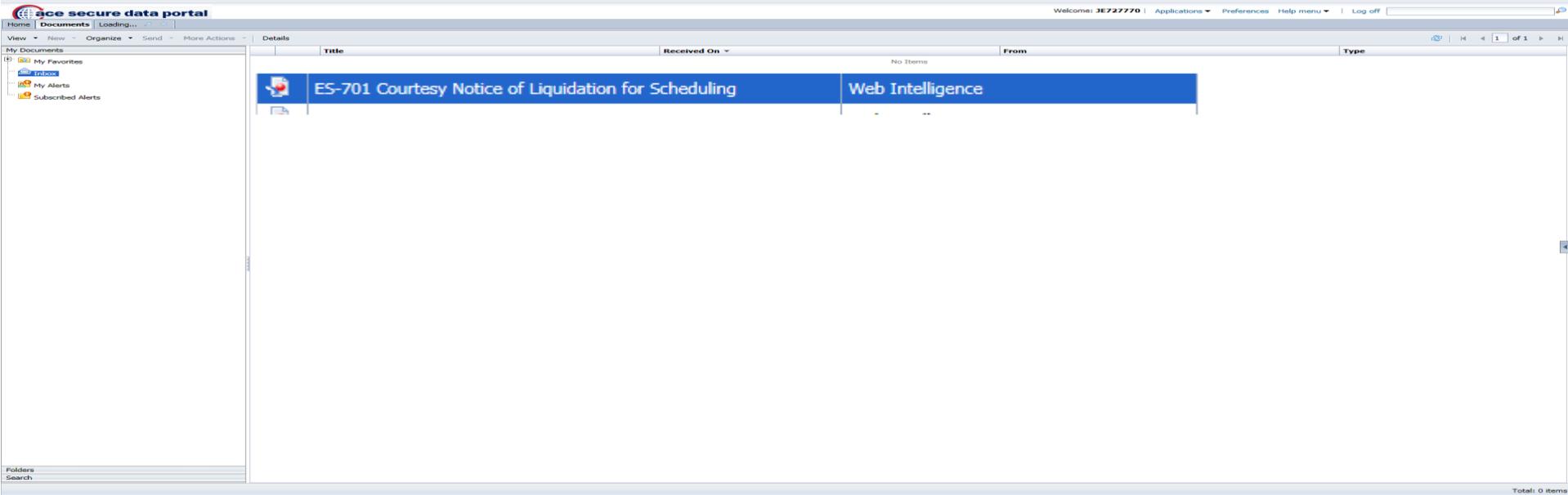
Cancel

## Scheduling an ACE Report





# Viewing Results of a Scheduled ACE Report



[Scheduling an ACE report](#)





# Running Ad Hoc Reports





# Creating Ad Hoc Reports

## ACE REPORTS

Role: Broker | Account ID: 0005676506

Search Workspaces:

Available Workspaces	Info
<b>Trade</b>	
Broker	
<b>Training</b>	
Training	

### Updates

12/21/2016 - New ACE Reports Data Dictionary for Trade now available on the ACE Reports Training Resources page

- 01/01/2021 - Bond New universe now available to Importers & Sureties
- 01/01/2021 - Cargo Release New universe now available to Brokers & Importers
- 01/01/2021 - Entry Summary New universe now available to Brokers & Importers
- 01/01/2021 - Drawback New universe now available to Brokers & Importers
- 01/01/2021 - Trade Remedy New universe now available to Brokers & Importers
- 01/01/2021 - Liquidation New universe now available to Brokers & Importers
- 01/01/2021 - Liquidation Bulletin New universe now available to Brokers & Importers
- 01/01/2021 - Protest New universe now available to Protest Filers
- 01/01/2021 - Reconciliation New universe now available to Brokers & Importers
- 01/01/2021 - In-Bond New universe now available to Carriers

Create Ad Hoc Report

View ACE Reports Training Resources



**Need Assistance?** The ACE Account Service Desk can be reached by phone at 866-530-4172 or via email at ACE.Support@cbp.dhs.gov

## Creating an Ad Hoc Report





# Selecting a Universe for Ad Hoc Reports

The screenshot displays the SAP ACE Reports web interface. At the top, the SAP logo is on the left, and the user's name 'Welcome: JE727770' along with navigation links for 'Applications', 'Preferences', 'Help menu', and 'Log off' are on the right. The main header area shows 'ACE REPORTS' and user information: 'Role: Broker | Account ID: 0005676506'. A central modal dialog box titled 'Create Ad Hoc Report' is open, containing the following fields:

- Universe:** A dropdown menu with the text 'Select a Universe'.
- Report Name:** A text input field with the placeholder 'Enter Report Name (Optional)'.
- Report Description:** A larger text input field with the placeholder 'Enter Report Short Description (Optional)'.

At the bottom of the dialog are two buttons: a blue 'Create Adhoc' button with a checkmark icon and a red 'Close' button with an 'X' icon. In the background, the 'Available Workspaces' list includes 'Trade', 'Broker', 'Training', and 'Training'. A 'Scheduling a Report' section provides instructions on how to schedule a report. At the bottom of the page, a dark blue bar contains a help icon and the text: 'Need Assistance? The ACE Account Service Desk can be reached by phone at 866-530-4172 or via email at ACE.Support@cbp.dhs.gov'.

## [Creating an Ad Hoc Report](#)





# Ad Hoc PGA Message Set Report

The screenshot shows the 'ace secure data portal' interface. At the top, it says 'Welcome: JE811ce' with navigation links for 'Applications', 'Preferences', 'Help menu', and 'Log off'. The main content area displays the report title 'PGA Message Set - Cargo Ad Hoc' in red, accompanied by the U.S. Department of Homeland Security logo. Below the title, the text 'NO DATA FOUND' is prominently displayed in red. The interface includes a 'Navigation Map' on the left with sub-items 'Main Report' and 'Report Parameters'. A toolbar at the top contains various icons for document management and analysis. The bottom status bar shows 'Main Report', 'Report Parameters', 'Track changes: Off', 'Page 1 of 1', '100%' zoom, and '132 days ago'.

## Creating an Ad Hoc Report





# Ad Hoc PGA Message Set Report Query Panel

U.S. Customs and Border Protection

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home | Documents | Loading... | Report Name

Query Panel

Add Query

Run Query | Close

Universe outline

PGA Message Set

unit of

Result Objects

Entry Number | Filer Code | Mode of Transportation Code | Port of Entry Code | Entry Line Value | Govt Agency Code | HTS Code | Cargo Description | PGA Line Value | Unit of Measure (PGA Line - Net) | Entry Filing Date | Importer Name

Importer Number

Query Filters

To filter the query, select predefined filters or objects in the Universe pane and add them here by clicking the arrow or using drag-and-drop. Select Filter to specify the values you want returned to reports or select Prompt to define a message so users can select values of their choice.

Data Preview

Type a text to filter the values

Query 1

## Creating an Ad Hoc Report





# Ad Hoc PGA Message Set Report Results

ace secure data portal

Welcome: Carlos Rodriguez | Applications | Preferences | Help menu | Log off

Home Documents PGA Message Set - Cargo...

File Properties Report Element Format Data Access Analysis Page Setup Reading Design Data

Table Cell Section Chart Others Tools Position Linking

Turn Into Set as Section

Available Objects

Type here to filter tree

- PGA Message Set - Cargo Ad Hoc
  - Agency Name
  - Description of Merchandise
  - Entry Date
  - Entry Number
  - Entry Status Code
  - Entry Type Cod.
  - Filer Code
  - Importer Number
  - Mode of Transportation Code
  - PGA Line Value
  - Port of Entry Code
  - Regulated HTS Number
  - System Of Release
  - Unit of Measure (PGA Line - Net)
  - Entry Line Value
  - Number of PGA Entry Lines
  - Variables

Arranged by: Alphabetic order



## PGA Message Set - Cargo Ad Hoc

FOR OFFICIAL USE ONLY UNLESS OTHERWISE AUTHORIZED

Entry Number	Entry Type Code	Entry Date	Filer Code	12-345678300	Mode of Transportation Code	Agency Name	Description of Merchandise	Number of PGA Entry Lines	PGA Line Value	Regulated HTS Number	Unit of Measure (PGA Line - Net)
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Consumer Product Safety Commission	AIRCRAFT AIR BOTTLE	1		7311000030	
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Department of Agriculture, Animal and Plant Health Inspection Service	AIRCRAFT AIR BOTTLE	1		7311000030	
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Department of Commerce, Bureau of the Census	AIRCRAFT AIR BOTTLE	1		7311000030	
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Department of Commerce, Enforcement and Compliance	AIRCRAFT AIR BOTTLE	1		7311000030	
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Department of Commerce, Foreign Trade Zones Board	AIRCRAFT AIR BOTTLE	1		7311000030	
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Department of Homeland Security, Customs and Border Protection	AIRCRAFT AIR BOTTLE	1		7311000030	
Y0507530879	01	07092016	Y05	12-345678300	40	U.S. Department of Homeland Security, Transportation Security Administration	AIRCRAFT AIR BOTTLE	1		7311000030	

Main Report | Page 1 of 1 | 01% | 22 minutes ago

100%

## Creating an Ad Hoc Report



# Sending an ACE Report to Another ACE Portal Account User



ace secure data portal

Welcome: JE727770 | Applications | Preferences | Help menu | Log off

Home Documents Loading...

View | New | Organize | Send | More Actions | Details

My Documents

- My Favorites
  - AdhocTemp
  - Carlos Rodriguez Folder
- Inbox
- My Alerts
- Subscribed Alerts

Title ^	Type	Last Run	Instances
AdhocTemp	Folder		
Carlos Rodriguez Folder	Folder		
AM-100 Courtesy Notice of Liquidation	Web Intelligence		9
Cargo Release Cancelled F	Web Intelligence		0
ESM-7025 CBP Form 28, 2	Web Intelligence		0

View  
Properties  
Modify  
Schedule  
Mobile Properties  
History  
Categories  
Document Link  
New >  
Organize >  
Send >  
Details

BI Inbox

## Inboxing an ACE Report





# Sending an ACE Report to Another ACE Portal Account User (Cont.)

Send AM-100 Courtesy Notice of Liquidation to BI Inbox

Use default settings

**Available Recipients:**

Find Title: JE811CE

Title	Full Name
No Items	

Find result for "JE811CE" in "User List"

- User List
- Group List
- Group Hierarchy

**Selected Recipients:**

Title ^	Full Name
JE811ce	

Target Name:

Use Automatically Generated Name

Use Specific Name  Add Placeholder

Add File Extension

Send As:

Shortcut

Copy

Send Cancel

[Inboxing a Report](#)



# Common Error in ACE Reports



U.S. Customs and  
Border Protection

Welcome: JE727770 | Applications ▾ | Preferences | Help menu ▾ | Log off

Home | Documents

## ACE REPORTS

ACE Reports page has encountered un-expected error.

Error Message:





# ACE and Automated Systems Page of CBP.gov

An official website of the United States government [Here's how you know](#)



U.S. Customs and Border Protection

- Travel
- Trade
- Border Security
- Newsroom
- About CBP
- Careers
- Employee Resources

Home » Trade » ACE and Automated Systems

## Trade

Basic Importing and Exporting

Forced Labor

**ACE and Automated Systems**

ACE Portal Modernization

Getting Started with Automated Systems

Technical Documentation

Vessel Entrance and Clearance System (VECS)

CBP Green Trade Strategy

Programs and Administration

Priority Trade Issues

Rulings and Legal Decisions

Stakeholder Engagement

Trade Facilitation and Trade Enforcement Act

USMCA

## ACE and Automated Systems

### **i** ACE Portal Modernization is Underway!

CBP recently began a transition of ACE Portal functionality to a modernized platform. For more information, please visit the [ACE Portal Modernization webpage](#).

The Automated Commercial Environment (ACE) is the system through which the trade community reports imports and exports and the government determines admissibility. CBP Trade applies expertise, technology, and automation to create streamlined and efficient processes to facilitate the global exchange of safe and legitimate goods.



Please visit the [ACE Transaction Details](#) page for full details on ACE transmission requirements.

ABOUT ACE	TRAINING & SUPPORT	TECHNICAL INFO
<a href="#">ACE Features</a> <a href="#">Get Started</a> <a href="#">ACE Portal Overview</a> <a href="#">Get Email Updates</a>	<a href="#">Guides and Videos</a> <a href="#">FAQs</a> <a href="#">Support Resources</a>	<a href="#">Programming Documentation and Implementation Guides</a>

To receive email updates on ACE, please subscribe to the [Cargo Systems Messaging Service \(CSMS\)](#). Users may also access the CSMS archive at the [CSMS Homepage](#).

### What's New with ACE

[Upcoming ACE Deployments](#)  
[ACE Development and Deployment Schedule](#)

### ACE Essentials

- [Get Started](#)
- [Apply for an ACE Portal Account](#)
- [ACE Portal Login](#)
- [ACE Reports \*New!\*](#)

### How to Stay Informed

- [Sign Up for CSMS](#)
- [Learn About the Trade Support Network \(TSN\)](#)

### How to Get Support

- [ACE Support](#)
- [ACE Availability Dashboard](#)
- [ACE Training](#)
- [FAQs](#)

### ACE Tweets

Curated Tweets by @CBPTradeGov



# ACE Reports Information Notices



- For an overview of the transition of **Imported Trade Activity Data to ACE Reports**, please view this [video](#)



Trade Information Notice  
Deploying April 2019

## CBP ACE Information Notice

*Transition of Importer Trade Activity Data to ACE Reports*

*April 2019*



Pub # 0876-0419



### ITRAC Information Notice

Last Updated: April 25, 2019

CBP is beginning the transition of Importer Trade Activity (ITRAC) data to ACE Reports, providing the trade with quicker, on-demand access to their data. On April 18, 2019, new reports were deployed in the new ITRAC workspace, each falling under one of four categories: Bond, Cargo Release, Entry Summary, and Reconciliation.

#### Can I run large volumes of data like I get with ITRAC extracts?

- During this transition, these reports will not be able to accommodate large data volumes like what would be provided in a 5-year ITRAC extract. Therefore, please limit the begin and end date filters in your reports accordingly, especially for the entry summary and cargo release reports.

#### What data is available now?

- Importers and Brokers can now find currently available ITRAC data in the ACE Reports ITRAC workspace, with two exceptions:
  - The ITRAC workspace does not currently contain a report with exam data. CBP is still determining how to best provide that data in ACE Reports; and
  - The bond data is currently not available to brokers.
- CBP will update this information notice as the full set of ITRAC data becomes available in ACE Reports.

#### Can I still request CDs and run uploads via the CTPAT portal?

- During the transition period, trade may continue to use existing processes for requesting ITRAC reports via CDs and quarterly uploads via the CTPAT portal (ISA participants). This will allow CBP time to migrate all ITRAC data and provide trade with time to familiarize with running ITRAC reports in ACE, while continuing to provide access to existing ITRAC reporting processes.

#### When will ITRAC data be fully transitioned to ACE Reports?

- Over the coming months, CBP will make ITRAC reports available via ACE Reports using a phased approach. At the end of the full transition to ACE, existing ITRAC reporting processes will be retired and replaced with quicker, more streamlined access to the data. Details on the phased timeline are outlined in the table on the following page.



2



Trade Information Notice  
Deploying April 2019

### ITRAC Information Notice

Last Updated: April 25, 2019

#### Transition of ITRAC Data – Phased Timeline

Dates	Transition Status
Spring 2019	<ul style="list-style-type: none"> <li>Most ITRAC data available in ACE Reports</li> <li>Continue to request multi-year ITRAC reports via CD</li> <li>ISA participants continue to use CTPAT portal for ITRAC reports</li> </ul>
Summer 2019	<ul style="list-style-type: none"> <li>Full access to ITRAC data in ACE Reports</li> <li>Continue to request multi-year ITRAC reports via CD</li> <li>ISA participants continue to use CTPAT portal for ITRAC reports</li> </ul>
Fall/Winter 2019	<ul style="list-style-type: none"> <li>ITRAC data fully implemented in ACE Reports</li> <li>Discontinue issuance of ITRAC reports via CD</li> <li>ISA participants continue to use CTPAT portal for ITRAC reports</li> </ul>

#### What resources are available?

- During the spring and summer 2019, trade should be sure to learn the basics of ACE Reports. Training is available via the links below:
  - Reference guide: <https://www.cbp.gov/trade/ace/training-and-reference-guides>
  - Webinar recording: <https://cbp.adobeconnect.com/pt8etlwev63/>

#### Who do I contact if I have questions?

- Please send any questions to [ace\\_reports@cbp.dhs.gov](mailto:ace_reports@cbp.dhs.gov).
- CBP will continue to provide additional details on what to expect in the coming months. Please continue to check CSMS and [www.cbp.gov/ace](http://www.cbp.gov/ace) for the latest updates on the ITRAC transition.



3





# Need Help with ACE Reports?



## ACE Reports Office Hours

**Got Reports Questions? We've Got Answers.**

*Schedule a Virtual Office Hours appointment with an ACE Reports expert and get help with your specific questions!*

### Office Hours Session Details

	<p><b>When? Every Tuesday</b></p> <p>15 or 30 minute appointments between:</p> <ul style="list-style-type: none"> <li>• 7:00AM - 9:00AM ET</li> <li>• 11:00AM - 2:00PM ET</li> </ul>
	<p><b>Who? All ACE Reports Users</b></p> <ul style="list-style-type: none"> <li>• Connect with an ACE Reports Expert</li> <li>• 1:1 Appointments</li> </ul>
	<p><b>How? Send Us An Email</b></p> <ul style="list-style-type: none"> <li>• Send an appointment request to <a href="mailto:ace.reports@cbp.dhs.gov">ace.reports@cbp.dhs.gov</a></li> <li>• Please include the following:             <ul style="list-style-type: none"> <li>• "Request for Virtual Office Hours Appointment" in the subject line</li> <li>• A brief description of your question/issue</li> </ul> </li> </ul>
	<p><b>Where? Attend Office Hours Virtually</b></p> <ul style="list-style-type: none"> <li>• Once an appointment is scheduled, a meeting invite will be provided with a link to attend a virtual meeting room</li> <li>• Telephone discussion</li> </ul>

Have you checked out the ACE Reports resources online? Before requesting an office hours appointment, be sure to review these videos for helpful ACE Reports information:

- ACE Reports Training Videos - <https://www.cbp.gov/trade/ace/training-and-reference-guides#reports>
- ACE Reports Webinar for the Trade - <https://www.cbp.gov/trade/ace/upcoming-ace-outreach-events-trade>





# ACE Portal and Reports Training on CBP.gov

An official website of the United States government. [Here's how you know](#)



U.S. Customs and Border Protection

- Travel
- Trade
- Border Security
- Newsroom
- About CBP
- Careers
- Employee Resources

Home » Trade » ACE Training and Reference Guides

## Trade

Basic Importing and Exporting

Forced Labor

ACE and Automated Systems

CBP Green Trade Strategy

Programs and Administration

Priority Trade Issues

Rulings and Legal Decisions

Stakeholder Engagement

Trade Facilitation and Trade Enforcement Act

USMCA

## ACE Training and Reference Guides

Welcome to the ACE training and reference guides page for the ACE Portal, manifest, and reports. For more specific help or assistance on the ACE Secure Data Portal, please visit the [ACE Support](#) page.

### ACE Portal Training

#### Modernized ACE Portal

- [Modernized ACE Portal - Account Type](#) *New*
- [Modernized ACE Portal - Create Account and Log In](#) *New*
- [Modernized ACE Portal - Create Account and Log In \(Spanish\)](#) *New*
- [Modernized ACE Portal - CBP Forms](#) *New*

#### Legacy ACE Portal

- [Brokers: How to Effectively Use the Legacy ACE Portal and ACE Reports](#) *New*
- [Carriers: How to Effectively Use the Legacy ACE Portal and ACE Reports](#) *New*
- [Exporters: How to Effectively Use the Legacy ACE Portal and ACE Reports](#) *New*
- [Importers: How to Effectively Use the Legacy ACE Portal and ACE Reports](#) *New*
- [Account - Initial Access](#)
- [Account - Exporter Account Access](#)
- [Account - Managing User Access](#)
- [Account - Cross Account Access](#)
- [Account - Merging](#)
- [Account - Employee Data Upload](#)
- [AD/CVD Cases & Messages](#)
- [Blanket Declaration Records](#)
- [Business Activity Log](#)
- [Entry Banks](#)
- [Forms - Receiving and Responding](#)
- [Legacy ACE Masking PII](#)
- [Importer Accounts - Form 5106](#)
- [Periodic Monthly Statement](#)
- [Post Summary Corrections](#)
- [Protest Setup and Submission](#)
- [Trade - QRC - Managing the Mode of Communication](#)
- [Trade - QRC - Broker Management](#)
- [Trade - QRC - AD/CVD Trade Public Messages](#)
- [Trade - QRC - AD/CVD Case and Message Search](#)
- [Vessel Agency Account Type](#) *New*
- [Video - How to Request Access to EIN Data](#)

#### ACE Essentials

- [Get Started](#)
- [Apply for an ACE Portal Account](#)
- [ACE Portal Login](#)
- [ACE Reports](#) *New!*

#### How to Stay Informed

- [Sign Up for CSMS](#)
- [Learn About the Trade Support Network \(TSN\)](#)

#### How to Get Support

- [ACE Support](#)
- [ACE Availability Dashboard](#)
- [ACE Training](#)
- [FAQs](#)

<https://www.cbp.gov/trade/ace/training-and-reference-guides>





# ACE Portal and Reports Training on CBP.gov

## ACE Reports Training

Learn more about ACE Reports by viewing the Quick Reference Cards (QRCs) and videos below:

**Accessing ACE Reports Applications:** Learn to navigate to ACE Reports from within the ACE Portal.

- [Quick Reference Card](#)
- [Video](#)

**Setting Default Preferences:** Learn to customize ACE Reports preferences.

- [Quick Reference Card](#)
- [Video](#)

**Navigating ACE Reports:** Learn the structure of the ACE Reports Home Page and Documents tab features.

- [Quick Reference Card](#)
- [Video](#)

**Navigating the Workspace Module:** View how to navigate within the reports workspace.

- [Quick Reference Card](#)
- [Video](#)

**Running a Standard Report:** Overview of running standard predefined ACE reports.

- [Quick Reference Card](#)
- [Video](#)

**Saving and Exporting a Report:** Learn how to save and export the results of a report.

- [Quick Reference Card](#)
- [Video](#)

**Modifying the Result Objects of a Report:** Learn how to modify the parameters of a report query.

- [Quick Reference Card](#)
- [Video](#)

**Add Input Controls:** Learn how to use Input Controls to apply filters to a report to analyze the data.

- [Quick Reference Card \*New\*](#)
- [Video \*New\*](#)

**Inboxing a Report:** Learn how to send reports to others using the BI inbox option.

- [Quick Reference Card \*New\*](#)
- [Video \*New\*](#)

**Sort and Filter Report Data:** Learn to use the Sort feature in Design mode to adjust the order to report data rows.

- [Quick Reference Card \*New\*](#)
- [Video \*New\*](#)

**Adding ACE Reports to the BI Home Tab:** Learn how to add ACE Reports to the BI Home Tab.

- [Quick Reference Guide \*New\*](#)

**Modifying the Display of a Report:** Learn how to customize the fields displayed in a report.

- [Quick Reference Card](#)
- [Video](#)

**Modifying Query filters:** Learn how to modify the filters in a query.

- [Quick Reference Card](#)
- [Video](#)

**Scheduling a Recurring Report:** Learn to run reports on a dynamic schedule of your choice.

- [Quick Reference Card](#)
- [Video](#)

**Creating Ad Hoc Reports:** Learn how to develop reports from the ground up.

- [Quick Reference Card](#)
- [Video](#)

**Nested Filters:** Learn how to nest filters in ACE Reports.

- [Quick Reference Card](#)
- [Video](#)

**Pasting Lists of Values into Filters:** Learn how to paste a list of values into filters.

- [Quick Reference Card](#)
- [Video](#)

**Adding Dynamic Dates:** Learn how to set dates to update dynamically for a regularly recurring report.

- [Quick Reference Card](#)
- [Video](#)

**Changing the Data Source:** Learn how to change the data source of a report to a new data universe.

- [Quick Reference Card \*New\*](#)
- [Video \*New\*](#)

**Add and Remove Breaks and Sections:** Learn how to use breaks and sections to divide reports into smaller or more comprehensive parts for easier reading and more effective data analysis.

- [Quick Reference Card \*New\*](#)
- [Video \*New\*](#)

**Visualize Data Using Charts and Graphs:** Learn how to add visual data, such as charts and graphs, to a report.

- [Quick Reference Card \*New\*](#)
- [Video \*New\*](#)

<https://www.cbp.gov/trade/ace/training-and-reference-guides#reports>



# ACE Trade Resources



## Client Representatives

Client Representatives serve as the primary point of contact for system-related problems and questions



## Technical Documentation

Find technical specifications needed to electronically transmit data to ACE, including PGA data, along with supplementary guidance.

[www.cbp.gov/ace-technical](http://www.cbp.gov/ace-technical)



## Training

Find user guides and online courses on the ACE Portal and system functions.

[www.cbp.gov/ace-training](http://www.cbp.gov/ace-training)



## Support

For support on ACE, including ACE Portal, ACE AESDirect, technical support, and more.

[www.cbp.gov/ace-support](http://www.cbp.gov/ace-support)



## E-mail Alerts

Receive automatic ACE updates: system outages, new capabilities, technical documentation and more.

<https://apps.cbp.gov/csms/csms.asp>



## Bi-weekly Trade Call

The biweekly call provides an opportunity for trade participants to receive ACE-related updates and to request input on technical questions.

[www.cbp.gov/ace-support](http://www.cbp.gov/ace-support)



## FAQs

Answers to some of our most frequent questions on: ACE Portal, manifest filings, cargo release, and more.

[www.cbp.gov/ace-faqs](http://www.cbp.gov/ace-faqs)



# Questions?

ACE.Support@cbp.dhs.gov  
1-866-530-4172



[www.cbp.gov/trade/automated/ace-faq](http://www.cbp.gov/trade/automated/ace-faq)