Modernized ACE Portal

Account Type

January 2022

U.S. Customs and
Border Protection

TABLE OF CONTENTS

TOPIC 1: CREATE A MODERNIZED ACE PORTAL ACCOUNT AND LOG IN

INTRODUCTION

Before you can access the Modernized ACE Portal, you must create a Modernized ACE Portal account. You will link your Legacy ACE account to your new Modernized ACE Portal account to synchronize your roles. This is a one-time step for the first login.

You can view all your Legacy ACE accounts in the Modernized ACE Portal and toggle between the two applications without logging in again.

IMPORTANT: Your ACE Accounts must be active and in good standing to link from the Legacy ACE Portal to the Modernized ACE Portal. Additionally, we recommend using Google Chrome to access the ACE Modernized Portal.

All fields are required.

CREATE A MODERNIZED ACE PORTAL ACCOUNT

1. In Google Chrome, type *ace.cbp.gov/*.

2. In the **Welcome to the ACE Secure Data Portal** page, select the **Trade/PGA User Login** button.

3. In the login screen, select the **Not a member?** hyperlink.

4. In the **Create Your CBP Account** pane:

   a. In the **First Name** field, type *your first name.*

   b. In the **Last Name** field, type *your last name.*

   c. In the **Email** field, type *your work email address.*

   d. In the **Create Password** field, type a *password.*

   NOTE: Passwords must have at least 12 characters at least one lower case letter, one upper case letter, and a number.

   TIP: As you create your password, a checkmark displays when each criterion has been met.

e. In the **Confirm Password** field, re-type *your password*.

f. Select the **SIGN UP** button.

Create Your CBP Account

CREATE YOUR FREE ACCOUNT TO GET STARTED

- First Name
- Last Name
- Email
- Create Password
- Confirm Password

SIGN UP

Already have an account? Login Here!

5. In the **Link Legacy ACE User Id** page:

   a. In the **User Id** field, type *your Legacy ACE user ID*.

   b. In the **Password** field, type *your Legacy ACE password*.

   c. Select the **Link Legacy ACE Account** button.

Link Legacy ACE User Id

User Id
ai9169f

Password
•••••••••••••••

Link Legacy ACE Account

IMPORTANT: When your Modernized ACE Portal and Legacy ACE accounts are linked, your roles are synchronized. Registering and linking to the Legacy ACE Portal is a one-time step

Your ACE Accounts must be active and in good standing to link from the Legacy ACE Portal to the Modernized ACE Portal.

LOG INTO THE MODERNIZED ACE PORTAL

1. In an internet browser, type *ace.cbp.gov/*.

2. In the **Welcome to ACE Secure Data Portal** page, in the **Sign into ACE** pane, select the **Trade/PGA User Login** button.
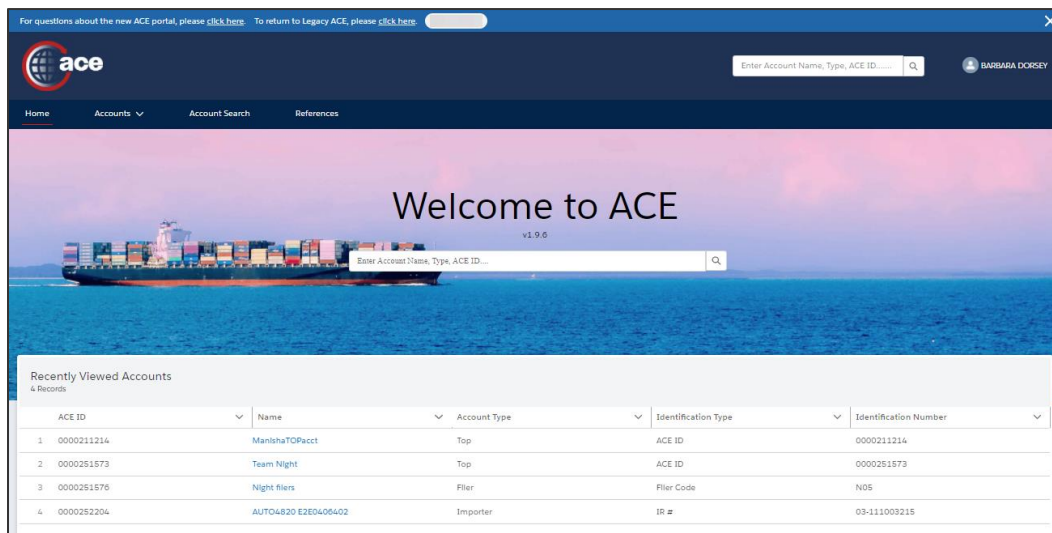
3. In the log in page:

   a. In the **Email** field, type *your account email address.*

   b. In the **Password** field, type *your account password.*

   c. Select the **LOG IN** button.

The **Welcome to ACE** home page displays.

TOPIC 2: ACCESS THE LEGACY ACE PORTAL FROM THE MODERNIZED ACE PORTAL

INTRODUCTION

All information in the Modernized ACE Portal is synchronized with the Legacy ACE Portal. Any updates you make in Legacy ACE Portal are visible in the Modernized ACE Portal. Any updates you make in the Modernized ACE Portal are visible in the Legacy ACE Portal.

Until all Legacy ACE Portal functionality is available in the Modernized ACE Portal, you can access the Legacy ACE Portal through the Modernized ACE Portal.

ACCESS THE LEGACY ACE PORTAL FROM THE MODERNIZED ACE PORTAL

1. In the **Welcome to ACE** page, select the **To return to Legacy ACE, please <u>click here</u>** hyperlink.

The Legacy ACE Portal displays bypassing the login screen.
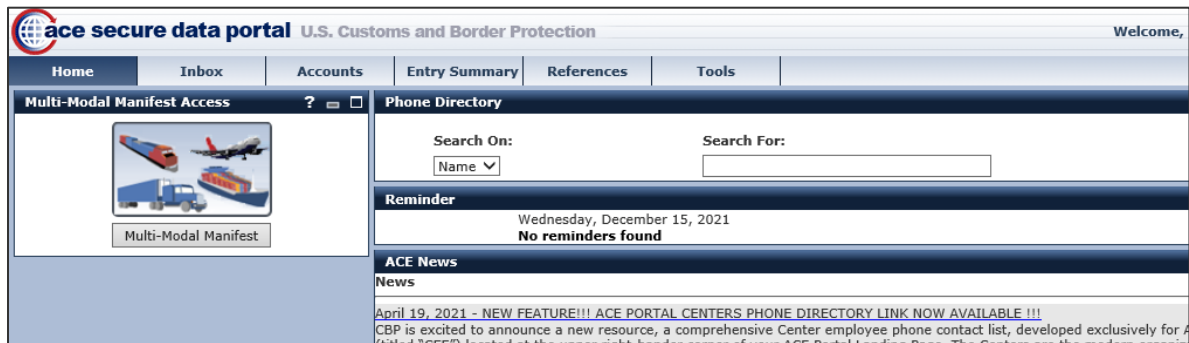
TOPIC 3: NAVIGATE THE MODERNIZED ACE PORTAL

INTRODUCTION

After creating your Modernized ACE Portal account, the Modernized ACE Portal home page displays. The home page consists of:

1. **Home**, **Accounts**, **Account Search**, and **References** tabs

   o **Home** – Returns you to the home page.

   o **Accounts** – Contains a list of all types of accounts.

   o **Account Search** – Displays all search results and filter capability.

   o **References** – Displays links to other ACE applications.

2. **Global Search** (**Enter Account Name, Type, ACE ID…**)

   o Search for accounts and records by keyword, name, or identifier.

3. **(Your Name)** drop-down menu:

   o **Contact Support** – Contact CBP with technical issues concerning the Modernized ACE Portal.

   o **Log Out** – Log out of the Modernized ACE Portal.

4. **Global Search (Enter Account Name, Type, ACE ID…)**

   o Search for accounts and records by keyword, name, or identifier.

5. **Recently Viewed Accounts**

   o The last ten accounts viewed.

   o Select an account hyperlink to display the account's details.

   > **IMPORTANT:** As a Trade user, you only are able to see your Top Accounts and all associated subaccounts. If you view one account ten times, it will only display once in **Recently Viewed Accounts**.
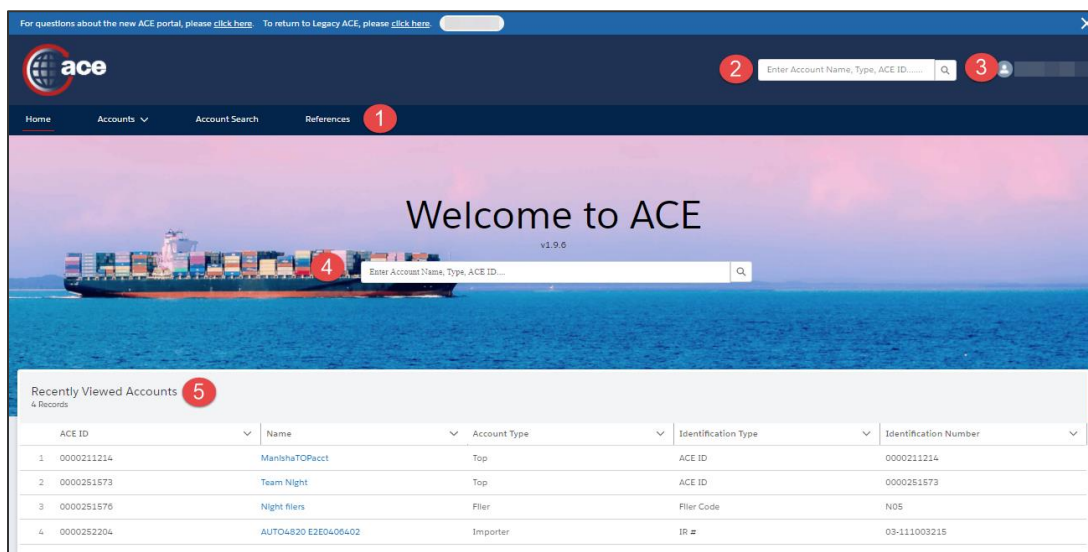

Figure 1: Modernized ACE Portal Home Page

6. **CBP News, CSMS Feed, and ACE Support** - Contains general CBP news, hyperlinks to Cargo System Messaging Service (CSMS) messages, and ACE support resources.

7. **ACE Development and Deployment Schedule** - Contains information associated with the Modernized ACE Portal deployments, and upcoming ACE Portal events.
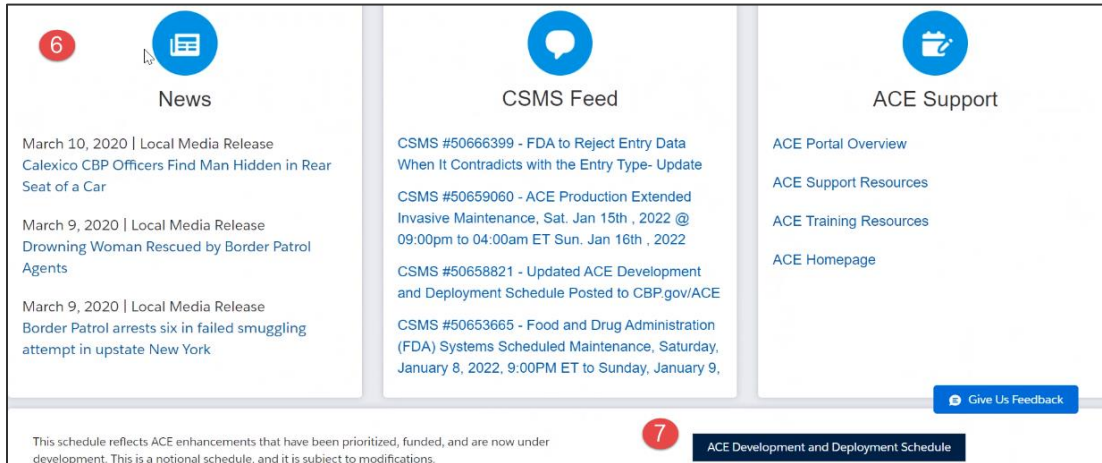

Figure 2: Modernized ACE Portal Home Page

8. **CBP Twitter Feed** – Contains links to CBP news.

9. **Footer** – Contains links to additional information not associated with the Modernized ACE Portal.
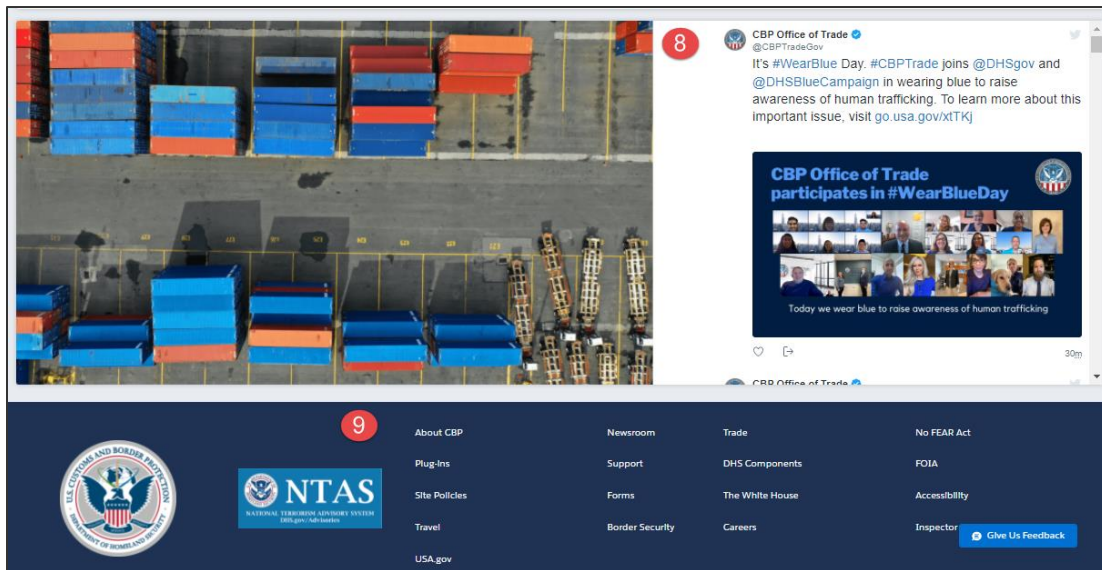
Figure 3: Modernized ACE Portal Home Page

SEARCH FOR AN ACCOUNT USING THE WELCOME TO ACE SEARCH FIELD

1. In the Global Search field:

   a. Type the *account name*.

   b. Select the **Search** 🔍 icon.

> **TIP:** You can also select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If the account is in the **Recently Viewed Accounts** list, select the account hyperlink.

2. In the search results page that displays, in the **Account Name** column, select an account name hyperlink.

The account details page displays. All subaccounts associated with the Top Account display in the **Account Navigation** pane.

3. Select any subaccount to display the subaccount's details.

SEARCH USING THE ACCOUNT TAB IN THE HOME PAGE

1. In the **Accounts** tab, select an account type from the drop-down menu.
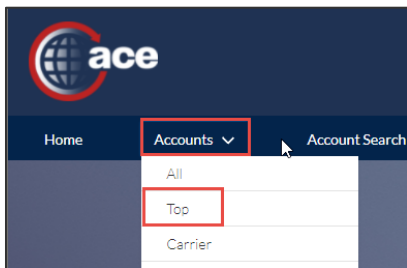
All your accounts for the account type selected display.

2. In the accounts page, in the **Account Name** column, select an account hyperlink.

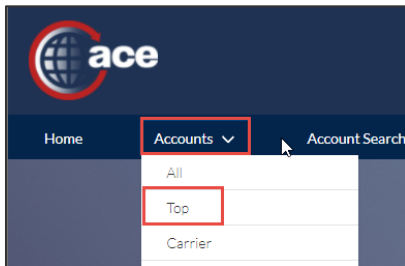The account details page and the **Details** tab displays.
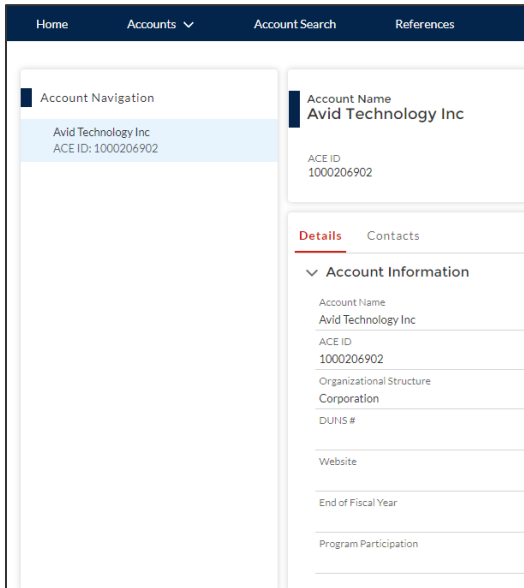
TOPIC 4: LOCATE AND EDIT A TOP ACCOUNT

INTRODUCTION

You can locate and edit any information in any of your Top Accounts in the Modernized ACE Portal.

LOCATE AND EDIT A CONTACT FOR A TOP ACCOUNT

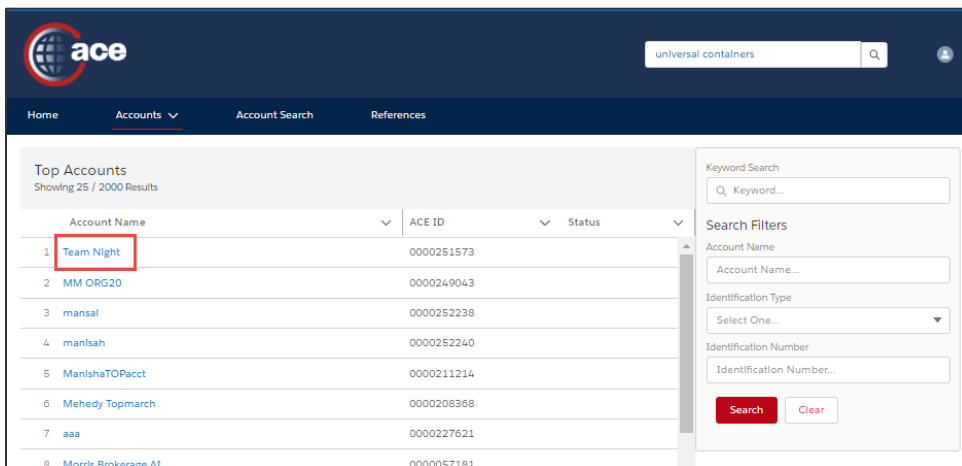1. In the **Accounts** tab, select **Top** from the drop-down menu.

All your top accounts display.

TIP: If you know the name of the Top Account, type it in the **Global Search** field. If the Top Account was recently viewed, select it from the **Recently Viewed Accounts** pane.

2. In the **Top Accounts** page, in the **Account Name** column, select an account name hyperlink.

The **Account Details** page displays.

NOTE: Use the **Search Filters** pane to filter the list of Top Accounts. In the **Keyword** field, search for accounts using whole or partial words and selecting the **Search** button. A wild card character is not required. All records with the keyword in the name will display regardless of the type of account. In addition to a keyword search, you can search by ID. When searching by ID, you can search by partial identification number.

3. In the **Details** or **Contacts** tab, select the **Edit** [pencil icon] icon in any field.

NOTE: The details for the Top Account display in the right pane. All accounts associated with the Top Account display in the **Account Navigation** pane on the left. Select a subaccount hyperlink to open the subaccount page.

To edit **Program Participation**, select the **Edit** [pencil icon] icon and move the programs using the **Move selection to selected programs** and **Move selection to available programs** arrows.

4. In the appropriate field:

   a. Select the field.

   b. Edit the information.

   c. Repeat for other fields as necessary.

   d. Select the **Save** button.

The Account Details pane displays with the edited information.

IMPORTANT: Any edits you make in the Modernized ACE Portal are visible in the Legacy ACE Portal.
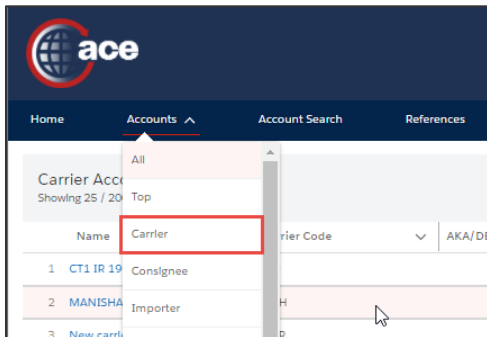
TOPIC 5: LOCATE AND EDIT SUBACCOUNT INFORMATION

INTRODUCTION

You can view and edit any of the subaccounts associated with your Top Accounts.
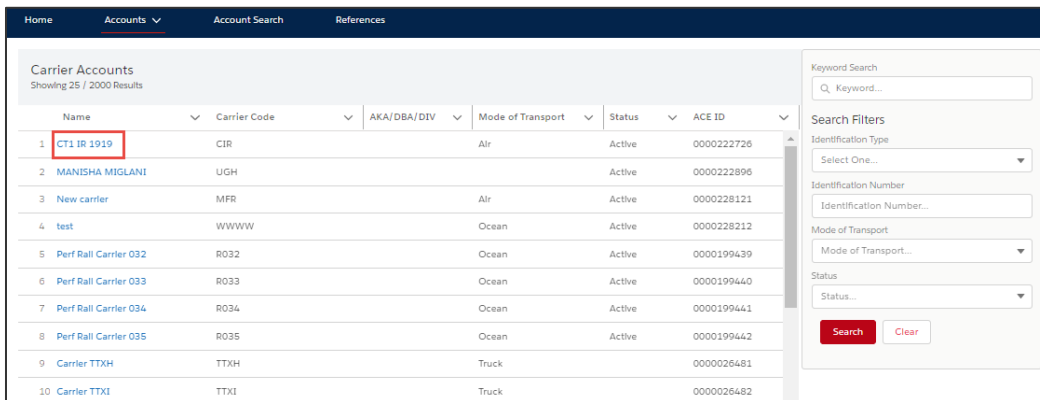
VIEW AND EDIT SUBACCOUNT INFORMATION

1. In the **Accounts** tab, select a record type from the drop-down menu.

> **TIP:** If you know the name of the record, type it in the **Global Search** field.

2. In the accounts page that displays, in the **Name** column, select an account name hyperlink.

> **NOTE:** Use the **Search Filters** pane to filter the list of Top Accounts. In the **Keyword** field, search for accounts using whole or partial words and selecting the **Search** button. A wild card character is not required. All records with the keyword in the name will display regardless of the type of account. In addition to a keyword search, you can search by ID. When searching by ID, you can search by partial identification number.

The **Account Details** page displays.

3. In the **Account Name** pane, select a tab.

> **NOTE:** The tabs available depend on the type of subaccount selected.

Account Name
CT1 IR 1919

Record Type Name	ACE ID	SCAC	Mode of Transport	Status
Carrier	0000222726	CIR	Air	Active

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

∨ Carrier Information

Carrier Name	Carrier Automated
CT1 IR 1919	
Taxpayer ID Type	Taxpayer ID
ACE ID	Mode of Transport
0000222726	Air

NOTE: You can expand and collapse sections to show/hide account information.

4. Select a hyperlink in the first column or the **Edit** [✎] icon (depending on the tab selected).

Account Name
EVANS PACKING

Record Type Name	ACE ID	Status
Facility	1000185783	Deactivated

Details   Contacts   **Addresses**   Employees   Officials

Related Addresses
2 Records

	Address Type	Street	City	State	Postal Code
1	Street (Physical) Address	35730 BOZEMAN RD	DADE CITY	Florida	33525-8505
2	Street (Physical) Address	35730 BOZEMAN RD	DADE CITY	Florida	33525-8505

5. In the appropriate field:

   a. Select the field.

   b. Edit the information.

   c. Repeat for other fields as necessary.
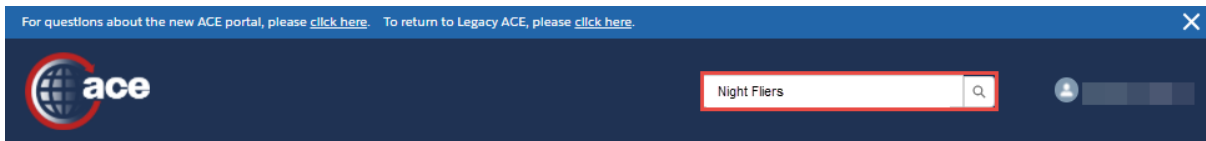
   d. Select the **Save** button.

TOPIC 6: ADD AN ADDRESS TO A SUBACCOUNT

INTRODUCTION

The Add Address functionality has been streamlined in the Modernized ACE Portal.

ADD AN ADDRESS TO A SUBACCOUNT

1. In the Global Search field:

    a. Type the *account name*.

    b. Select the **Search** icon.

> **TIP:** You can also select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If the account is in the **Recently Viewed Accounts** list, select the account hyperlink.

2. In the pane that displays:

    a. Select the **Addresses** tab.

    b. Select the **Add New Address** button.
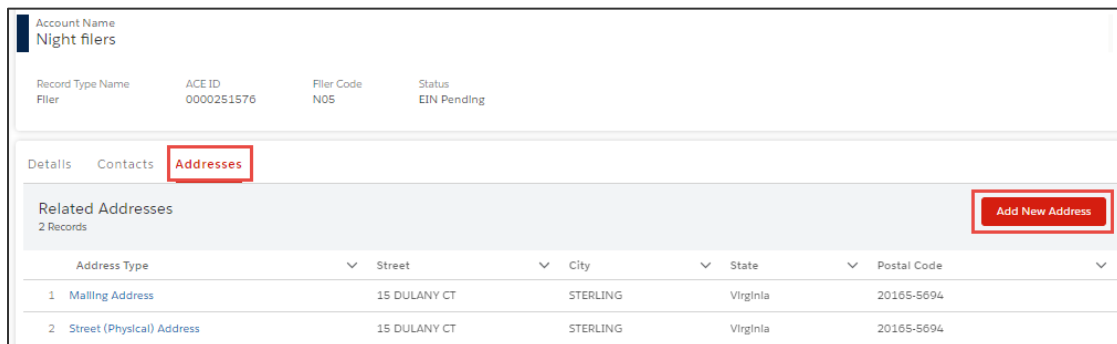
> **TIP:** You can update an existing address by selecting the address type hyperlink in the **Address Type** column.

3. In the **Create New Address** dialog box, in the **Address Information** section:

    a. In the **Address Type** drop-down menu, select the type of address.

    b. In the ***Street** field, type the *street address*.

    c. In the **City** field, type the *city where the address is located*.

    d. In the **State** field, type the *state where the address is located*.

    e. In the **Postal Code** field, type the *zip code for the address*.

4. In the **Contact Information** section:

a. In the **Phone** field, type the *telephone number for the address.*

b. In the **Email** field, type the *email address for the location.*

c. Complete other fields as appropriate.

d. Select the **Save** button.

5. In the **Validate Address** dialog box:

a. Select the **Use Validated Address?** checkbox to use the validated address.

b. Select the **Done** button.

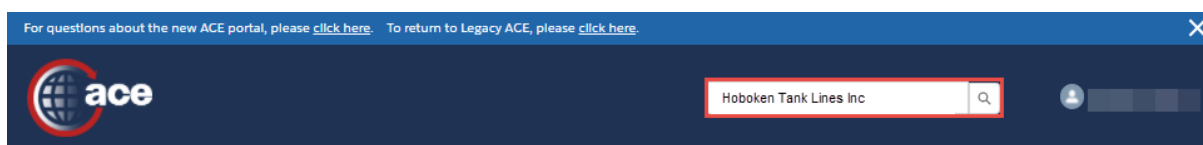The new address displays in the **Related Addresses** table.

TOPIC 7: ADD A CONTACT TO AN ACCOUNT OR SUBACCOUNT

INTRODUCTION

To add a contact to an account or subaccount, select the **Add Contact** button and complete the four steps. Fields with an asterisk are required.

ADD A CONTACT TO AN ACCOUNT OR SUBACCOUNT

1. In the Global Search field:

    a. Type the *account name*.

    b. Select the **Search** 🔍 icon.

> **TIP:** You can also select the **Accounts** drop-down menu and select the type of account, then select the account from the list that displays. If the account is in the **Recently Viewed Accounts** list, select the account hyperlink.

2. In the pane that displays:

    a. Select the **Contacts** tab.

    b. Select the **Add Contact** button.
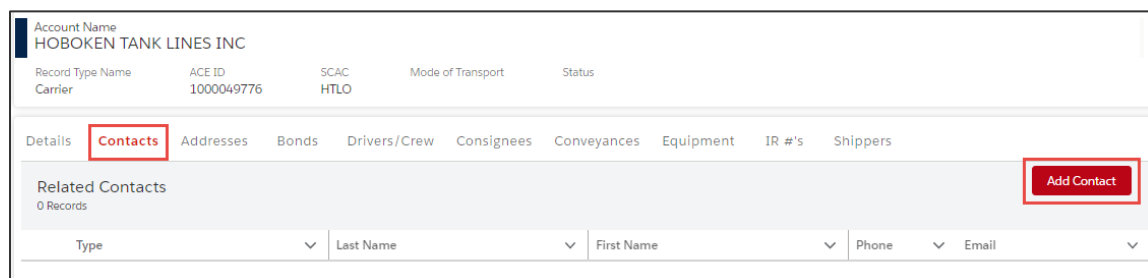
3. In the **Add New Contact Step 1 (of 4): Personal Information** dialog box:

    a. In the *****Type** drop-down menu, select the type of contact.

    b. In the *****First Name** field, type the *contact's first name.*

    c. In the *****Last Name** field, type the *contact's last name.*

    d. Complete other fields as appropriate.

    e. Select the **Save & Continue** button.

4. In the **Add Contact Step 2 (of 4): Address Information** dialog box:

    a. In the ***PO Box** field, type the *contact's PO Box number*.

    b. In the ***Country** drop-down menu, select the contact's country.

    c. Complete other fields as appropriate.

    d. Select the **Save & Continue** button.

5. In the **Validate Address** dialog box:

    a. Select the **Use Validated Address?** checkbox to use the validated address.

    b. Select the **Done** button.

6. In the **Add New Address Step 3 (of 4): Contact Information** dialog box:

   a. Complete the contact fields, as appropriate.

   b. Select the **Save & Continue** button.

7. In the **Add New Contact Step 4 (of 4): Review Details** dialog box:

   a. Review the contact information.

   b. Select the **Edit** button to make any changes.

   c. Select the **Save & Submit** button.

The contact information displays in the **Contact** tab.

## TOPIC 8: SHARE FEEDBACK ON THE MODERNIZED ACE PORTAL

INTRODUCTION

Share feedback on what you like or what can be improved using the Give Us Feedback feature. The feedback is monitored and shared with the stakeholders to determine if the suggestion(s) should be implemented.

The **Give Us Feedback** button displays on each page of the Modernized ACE Portal.

SHARE FEEDBACK ON THE MODERNIZED ACE PORTAL

1. In the Modernized ACE Portal, select the **Give Us Feedback** button.
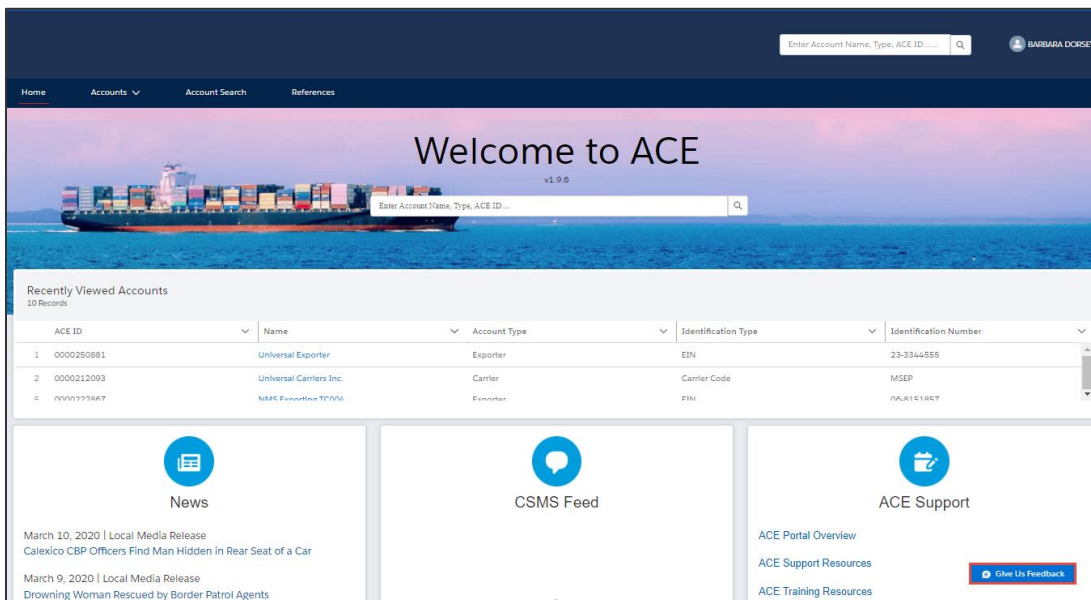
2. In the **Give Us Feedback** dialog box:

   a. In the **What do you like?** field, type a *comment*.

   b. In the **What we can improve?** field, type a *comment*.

   c. In the **Rate Us!** field, move the slider bar to rate the UI.

   d. Select the **Submit** button.

   NOTE: Select the **Cancel** button to cancel the feedback and close the dialog box.

   Select the **Need Support?** hyperlink for general information about CBP.

TOPIC 9: ACCESS SUPPORT FOR MODERNIZED ACE PORTAL ISSUES
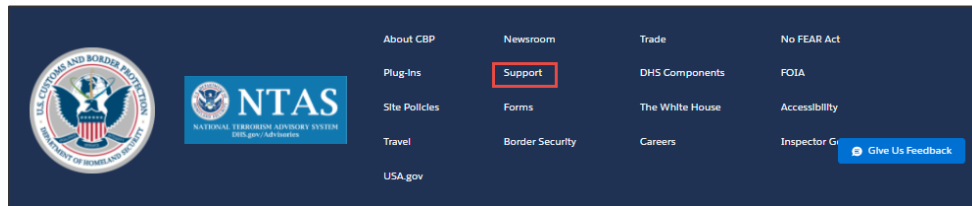
INTRODUCTION

Unlike Feedback, use the Support feature to get help with technical issues.

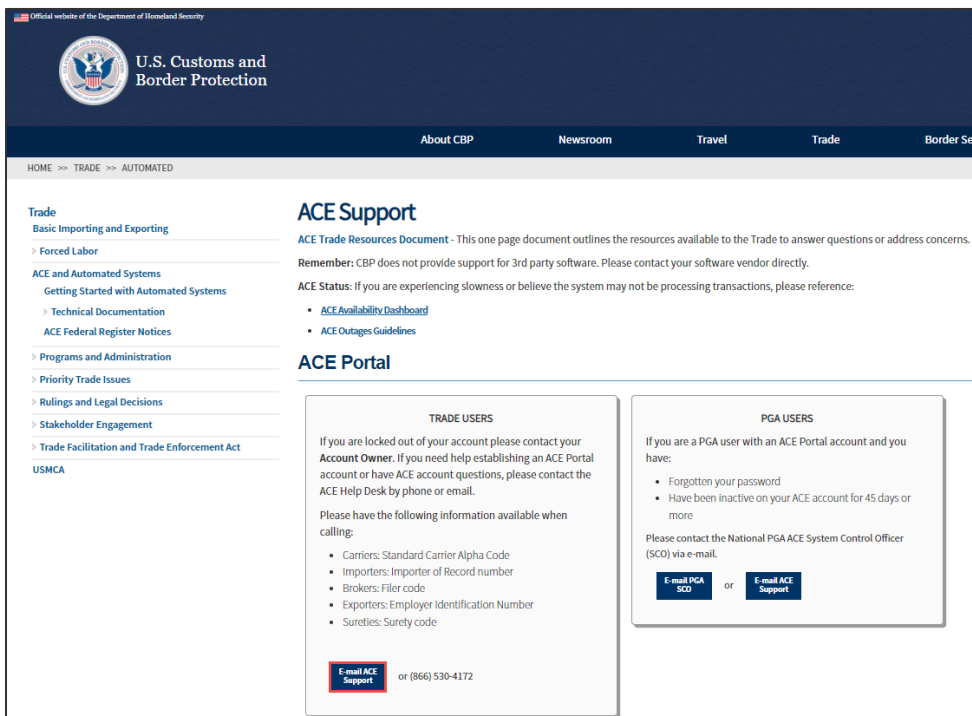### ACCESS SUPPORT FOR MODERNIZED ACE PORTAL ISSUES

1. In the Modernized ACE Portal home page, select **Support** from the drop-down menu next to your name.

NOTE: You can also access support through the **Support** hyperlink in the footer on the home page.

2. In the **ACE Support** home page, in the ACE Portal section, select the **E-mail ACE Support** button.

An email addressed to ACE.Support@cbp.dhs.gov will open in your default email application.

3. In the email body, type the issue you are having with the Modernized ACE Portal.

4. Select the send button.

The email is sent to the CBP Technology Service Desk (TSD)/ACE Service Desk (ASD). An email will be sent back when the issue is resolved and/or seeking additional information acknowledging the receipt of the request.