

# **QUICK REFERENCE GUIDE**

## **AUTOMATED COMMERCIAL ENVIRONMENT (ACE)**

### **IMPORTER ACCOUNTS**



### **OFFICE OF TRADE**



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

**VERSION 1.0**

**MARCH 2019**

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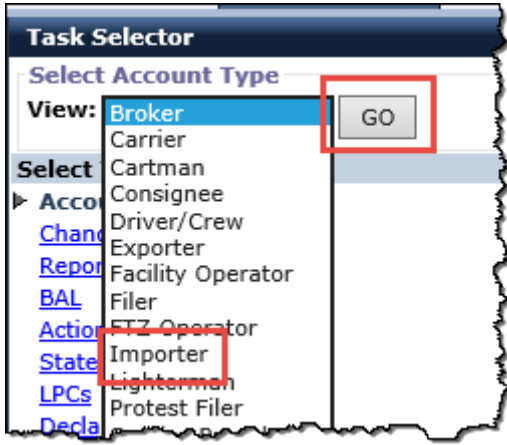
## TOPIC 1: VIEW IMPORTER ACCOUNTS


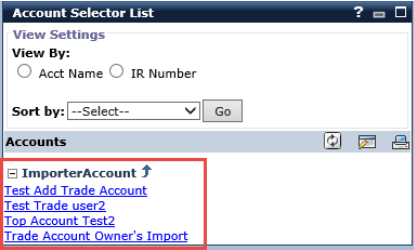

### INTRODUCTION

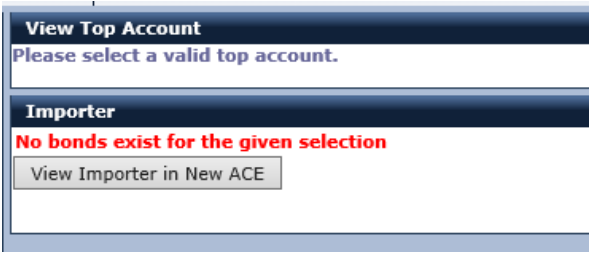
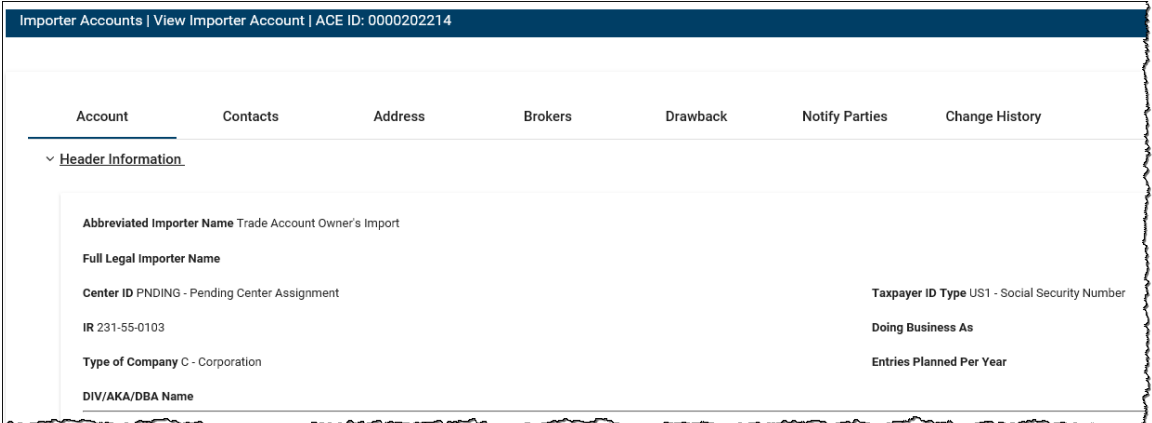
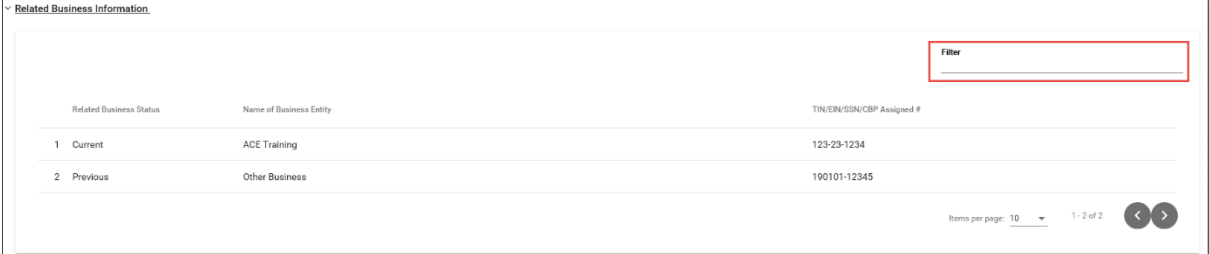
The Importer Accounts user interface (UI) for viewing and editing importer data within ACE has been updated. While you will still log into the **ACE Secure Data Portal** to locate an importer account, there is now a **View Importer in New ACE** button to launch a new application for accessing the importer’s data. Users with the **Trade User** or **CBP Importer Account Portal User** role will be able to view importer account data in New ACE.

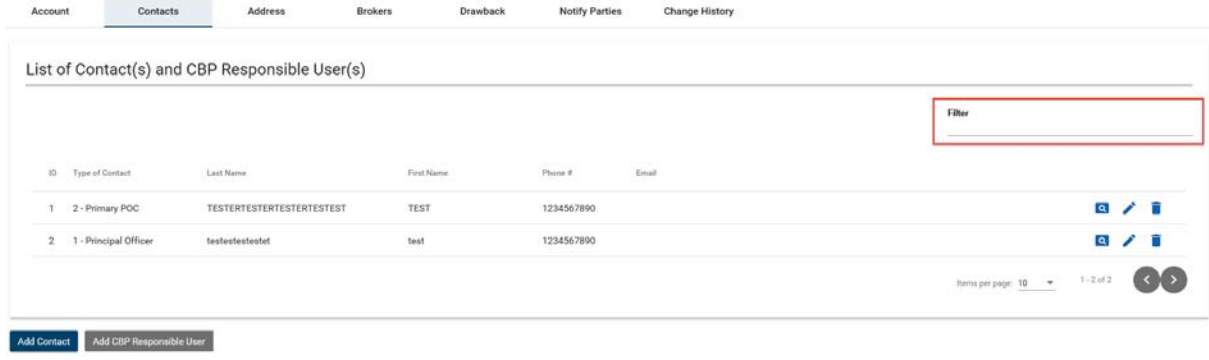


For directions on how to log into the ACE Secure Data Portal, visit the **ACE Training and Reference Guides** webpage at <https://www.cbp.gov/trade/ace/training-and-reference-guides#portal> and select the **Account – Initial Access** hyperlink.

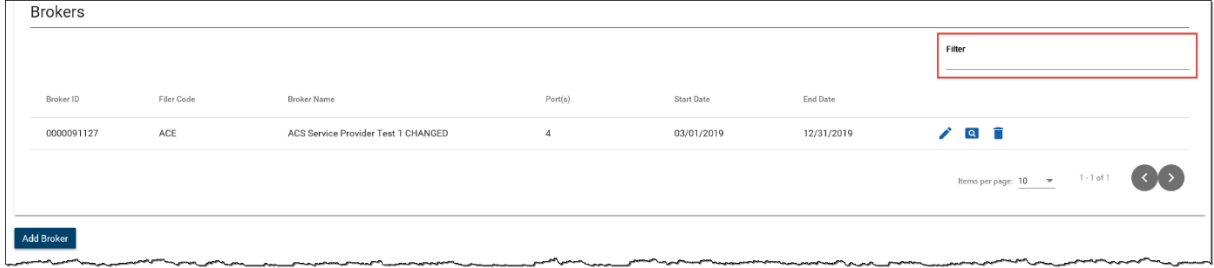
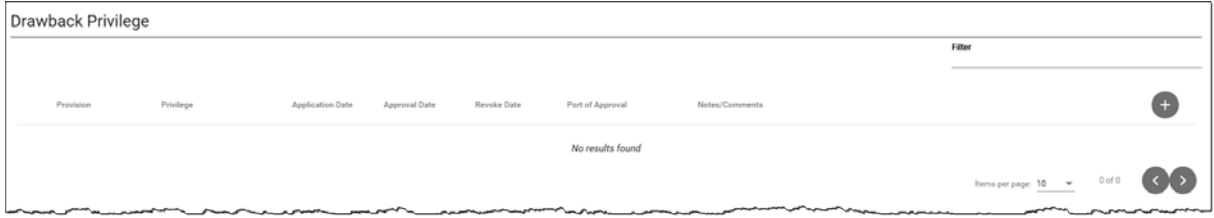

### HOW TO VIEW AN IMPORTER ACCOUNT





| Step | Action                                                                                                                                                                                                                                                                            |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Select the <b>Accounts</b> tab.                                                                                                                                                                |
| 2.   | In the <b>Task Selector</b> panel: <ol style="list-style-type: none"> <li>a. From the <b>View:</b> drop-down menu select <b>Importer</b>.</li> <li>b. Select the <b>GO</b> button.</li> </ol>  |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3.   | <p>In the <b>Account Selector List</b> panel, in the <b>Accounts</b> subsection:</p> <ol style="list-style-type: none"><li>Select the <b>Expand</b> icon  for the Top Account.</li><li>Select an importer account hyperlink.</li></ol>  <p>The <b>View Top Account</b> and <b>Importer</b> panels display for the selected importer account.</p>  <p><b>NOTE:</b> The <b>View Top Account</b> panel will display the message <b>Please select a valid top account</b> when not viewing a top account.</p> |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.   | <p>In the <b>Importer</b> panel, select the <b>View Importer in New ACE</b> button.</p>  <p>The <b>Importer Accounts</b> application opens in a new browser tab with the importer's information. The <b>Account</b> tab is selected by default and displays the importer's:</p> <ol style="list-style-type: none"> <li><b>Header Information</b></li> <li><b>Additional Information</b></li> <li><b>Related Business Information</b></li> <li><b>Company Information</b></li> <li><b>Partnership Information</b></li> <li><b>Administration Control Information</b></li> <li><b>Certification Information</b></li> </ol>  |
| 5.   | <p>In the <b>Related Business Information</b> section, in the <b>Filter</b> field, type a <i>business name</i> or <i>ID number</i> to filter the rows of related businesses.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6.   | Select the <b>Contacts</b> tab to view the importer's <b>List of Contact(s) and CBP Responsible User(s)</b> table.                                                                                                                                                                                                                                                                                                                             |
| 7.   | <p>In the <b>List of Contact(s) and CBP Responsible User(s)</b> section, in the <b>Filter</b> field, type a contact's <i>name</i> to filter the rows of contacts.</p>                                                                                                                                                                                        |
| 8.   | <p>Select the icon  to view the details of a contact.</p> <p>The <b>Contact</b> dialog-box displays with the contact's:</p> <ol style="list-style-type: none"> <li><b>Contact Information</b></li> <li><b>Contact Address</b></li> <li><b>Phone and Email</b></li> </ol>  |
| 9.   | Select the <b>OK</b> button to close the <b>Contact</b> dialog-box.                                                                                                                                                                                                                                                                                                                                                                            |
| 10.  | Select the <b>Address</b> tab to view the importer's <b>Mailing Address</b> and <b>Physical Address</b> .                                                                                                                                                                                                                                                                                                                                      |
| 11.  | Select the <b>Brokers</b> tab to view the importer's brokers.                                                                                                                                                                                                                                                                                                                                                                                  |

| Step | Action                                                                                                                                                                                                                                    |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 12.  | <p>In the <b>Brokers</b> section, in the <b>Filter</b> field, type a <i>broker's name, ID number, or filer code</i> to filter the rows of brokers.</p>  |
| 13.  | <p>Select the <b>Drawback</b> tab to view the importer's drawback privileges.</p>                                                                                                                                                         |
| 14.  | <p>In the <b>Drawback Privilege</b> section, in the <b>Filter</b> field, type a <i>drawback provision</i> to filter the rows of privileges.</p>        |
| 15.  | <p>Select the <b>Notify Parties</b> tab to view the importer's notify parties.</p>                                                                                                                                                        |
| 16.  | <p>In the <b>Notify Parties</b> section, in the <b>Filter</b> field, type a <i>name or ID number</i> to filter the rows of parties.</p>               |
| 17.  | <p>Select the <b>Change History</b> tab to view the change history log of the importer's account.</p>                                                                                                                                     |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           |                               |                 |            |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-------------------------------|-----------------|------------|-----------|-----------|---|------------------------|--|--------------------|--|------------|---|------------------------|--|------------------------------|------|--|---|------------------------|--|-----------------------------|-----------------|--|---|------------------------|--|-------------------------------|------------|--|
| 18.  | <p>In the <b>Search</b> section, type a <i>date</i> in the <b>Start Date</b> field and a <i>date</i> in the <b>End Date</b>.</p> <div data-bbox="259 346 1453 751" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Search</p> <hr/> <p><b>Start Date</b><br/>02/01/2019  <b>End Date</b><br/>02/07/2019 </p> <p style="font-size: small;">MM/DD/YYYY <span style="margin-left: 200px;">MM/DD/YYYY</span></p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> </div> <p> <b>TIP:</b> Alternatively, select the calendar icon  to open a calendar to select a <b>Start Date</b> and <b>End Date</b>.</p>                                                                                                                           |           |                               |                 |            |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
| 19.  | <p>Select the <b>Search</b> button.</p> <p>The change history displays in the <b>Search Results</b> section based on the selected date range.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |           |                               |                 |            |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
| 20.  | <p>In the <b>Search Results</b> section, in the <b>Filter</b> field, type a <i>value</i> to filter the rows of change history by <b>New Value</b> or <b>Old Value</b>.</p> <div data-bbox="259 1165 1453 1638" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Search Results</p> <hr/> <p><b>Filter</b></p> <hr/> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>ID</th> <th>Date and Time ↓</th> <th>Change By</th> <th>Field</th> <th>New Value</th> <th>Old Value</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>02/06/2019<br/>16:20:36</td> <td></td> <td>Contact Fax Number</td> <td></td> <td>7033545657</td> </tr> <tr> <td>2</td> <td>02/06/2019<br/>15:29:02</td> <td></td> <td>Contact Address House Number</td> <td>1801</td> <td></td> </tr> <tr> <td>3</td> <td>02/06/2019<br/>15:29:02</td> <td></td> <td>Contact Address Street Name</td> <td>N BEAUREGARD ST</td> <td></td> </tr> <tr> <td>4</td> <td>02/06/2019<br/>15:29:02</td> <td></td> <td>Contact Address City/Province</td> <td>ALEXANDRIA</td> <td></td> </tr> </tbody> </table> </div> | ID        | Date and Time ↓               | Change By       | Field      | New Value | Old Value | 1 | 02/06/2019<br>16:20:36 |  | Contact Fax Number |  | 7033545657 | 2 | 02/06/2019<br>15:29:02 |  | Contact Address House Number | 1801 |  | 3 | 02/06/2019<br>15:29:02 |  | Contact Address Street Name | N BEAUREGARD ST |  | 4 | 02/06/2019<br>15:29:02 |  | Contact Address City/Province | ALEXANDRIA |  |
| ID   | Date and Time ↓                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Change By | Field                         | New Value       | Old Value  |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
| 1    | 02/06/2019<br>16:20:36                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           | Contact Fax Number            |                 | 7033545657 |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
| 2    | 02/06/2019<br>15:29:02                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           | Contact Address House Number  | 1801            |            |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
| 3    | 02/06/2019<br>15:29:02                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           | Contact Address Street Name   | N BEAUREGARD ST |            |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |
| 4    | 02/06/2019<br>15:29:02                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |           | Contact Address City/Province | ALEXANDRIA      |            |           |           |   |                        |  |                    |  |            |   |                        |  |                              |      |  |   |                        |  |                             |                 |  |   |                        |  |                               |            |  |



## TOPIC 2: CREATE AN IMPORTER ACCOUNT

### INTRODUCTION


Creating an importer account is now accomplished through a new ACE application. A user with the **Trade User** role will be capable of creating a new importer account. After logging into the ACE Secure Data Portal, you will select the **Create Importer in New ACE** button to launch the **Importer Accounts** application.

For directions on how to log into the ACE Secure Data Portal, visit the **ACE Training and Reference Guides** webpage at <https://www.cbp.gov/trade/ace/training-and-reference-guides#portal> and select the **Account – Initial Access** hyperlink.

### HOW TO CREATE AN IMPORTER ACCOUNT



| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Select the <b>Accounts</b> tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 2.   | In the <b>Task Selector</b> panel: <ol style="list-style-type: none"> <li>From the <b>View:</b> drop-down menu, select <b>Importer</b>.</li> <li>Select the <b>GO</b> button.</li> </ol>                                                                                                                                                                                                                                                                                                               |
| 3.   | Select the <b>Create Importer</b> hyperlink. <div data-bbox="256 1035 617 1318" data-label="Image"> <p>The screenshot shows a 'Task Selector' window with a 'Select Account Type' section containing a 'View:' dropdown menu set to 'Importer' and a 'GO' button. Below this is a 'Select Task' section with a list of links: 'Accounts', 'Create Importer' (highlighted with a red box), 'Change History', 'Reports', 'BAL', and 'Action Plan'.</p> </div> <p>The <b>Importer</b> panel displays.</p> |
| 4.   | In the <b>Importer</b> panel, select the <b>Create Importer in New ACE</b> button. <div data-bbox="261 1457 850 1654" data-label="Image"> <p>The screenshot shows an 'Importer' window with two buttons: 'Create Importer in New ACE' and 'Cancel'.</p> </div> <p>The <b>Importer Accounts</b> application opens in a new browser tab.</p>                                                                                                                                                             |

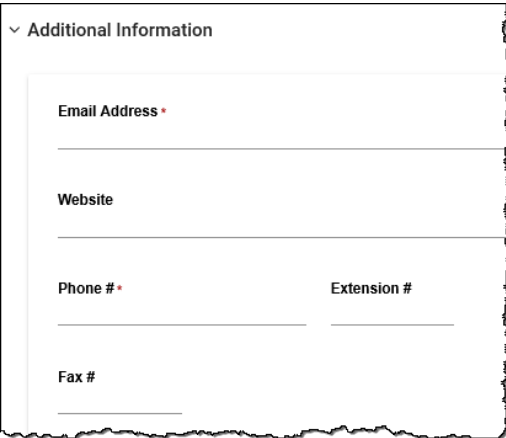






| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6.   | <p>In the <b>Header Information</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>DIV/AKA/DBA Name</b> field, type the <i>division name, also known as name, or other name</i> of importer.</li> <li>From the <b>Type of Company *</b> drop-down menu, select a company type.</li> <li>From the <b>Entries Planned Per Year</b> drop-down menu, select a value.</li> <li>In the <b>How ID will be utilized</b> field, select the checkbox(es) for all values that apply and/or type a value in the <b>Other – explain</b> field.</li> <li>From the <b>Program Code</b> drop-down menu, select the checkbox(es) for all values that apply.</li> </ol> <p> <b>IMPORTANT:</b> You cannot request a CBP assigned IR# when creating an importer account through the <b>ACE Importer Accounts</b> application.</p> <div data-bbox="261 793 1455 1417" style="border: 1px solid black; padding: 5px;"> <p>DIV/AKA/DBA Name <span style="float: right;">Type of Company *<br/>Choose an option</span> <span style="float: right;">Entries Planned Per Year<br/>Choose an option</span></p> <p>Max 32 characters</p> <p>Request CBP Assigned IR # <input type="radio"/> Yes <input type="radio"/> No</p> <p>If Yes, Check all that apply</p> <p><input type="checkbox"/> I have a SSN, but wish to use a CBP-Assigned Number on all my entry documents</p> <p><input type="checkbox"/> I have no SSN <input type="checkbox"/> I have no IRS # <input type="checkbox"/> I have not applied for IRS # or SSN <input type="checkbox"/> I am not a U.S. Resident</p> <p>How ID will be utilized (Check all that apply)</p> <p><input type="checkbox"/> Importer of Record <input type="checkbox"/> Consignee/Ultimate Consignee <input type="checkbox"/> Drawback Claimant <input type="checkbox"/> Refunds/Bills</p> <p><input type="checkbox"/> Other <input type="text"/></p> <p>Program Code<br/>Choose an option</p> </div> |



| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7.   | <p>In the <b>Address Information</b> section, in the <b>Mailing Address</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>P.O. Box</b> field, type the <i>P.O. Box</i>.</li> <li>In the <b>Street Address Line 1 *</b> field, type the <i>street address</i>.</li> <li>In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>In the <b>City*</b> field, type the <i>city</i>.</li> <li>From the <b>Country ISO Code *</b> drop-down menu, select the <i>country</i>.</li> <li>From the <b>State/Province</b> drop-down menu, select the <i>state/province</i>.</li> <li>In the <b>Zip-Code</b> field, type the <i>ZIP code</i>.</li> <li>From the <b>Address Type *</b> drop-down menu, select the type of address entered.</li> <li>If address type is “<b>8 – Other</b>”, in the <b>Other Explain</b> field, type an <i>explanation of other address type</i>.</li> </ol> <div data-bbox="259 825 1461 1764" style="border: 1px solid black; padding: 10px;"> <p>▼ Address Information</p> <div style="border: 1px solid gray; padding: 10px; margin-top: 10px;"> <h3 style="margin: 0;">Mailing Address</h3> <hr/> <p><b>P.O. Box</b></p> <p>.....</p> <p><b>Street Address Line 1 *</b></p> <hr/> <p>Max 64 characters</p> <p><b>Street Address Line 2</b></p> <hr/> <p>Max 32 characters</p> <p><b>City *</b></p> <hr/> <p>Max 35 characters</p> <p><b>Country ISO Code *</b> <span style="float: right;"><b>State/Province</b></span></p> <p>Choose an option <span style="float: right;">▼ Choose an option</span></p> <p><b>Zip-Code</b> <span style="float: right;"><b>Address Type *</b></span></p> <p><span style="float: right;">Choose an option</span></p> <hr/> <p><b>Other Explain</b></p> <p>Input Only Allowed on Address Type of Other</p> <p>.....</p> </div> </div> |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8.   | <p>In the <b>Address</b> section, in the <b>Physical Address</b> subsection:</p> <ol style="list-style-type: none"> <li>a. In the <b>Street Address Line 1</b> field, type the <i>street address</i>.</li> <li>b. In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>c. In the <b>City</b> field, type the <i>city</i>.</li> <li>d. From the <b>Country ISO Code</b> drop-down menu, select the country.</li> <li>e. From the <b>State/Province</b> drop-down menu, select the state/province.</li> <li>f. In the <b>Zip-Code</b> field, type the <i>ZIP code</i>.</li> <li>g. From the <b>Address Type</b> drop-down menu, select the type of address entered.</li> <li>h. If address type is "Other", in the <b>Other Explain</b> field, type an <i>explanation of other address type</i>.</li> <li>i. Select the <b>Use Address As Entered</b> checkbox to override address standardization and use the address exactly as entered.</li> </ol> <p> <b>TIP:</b> Select the <b>Copy Mailing Address</b> button to populate the <b>Physical Address</b> subsection fields with the importer's <b>Mailing Address</b> values.</p>  |

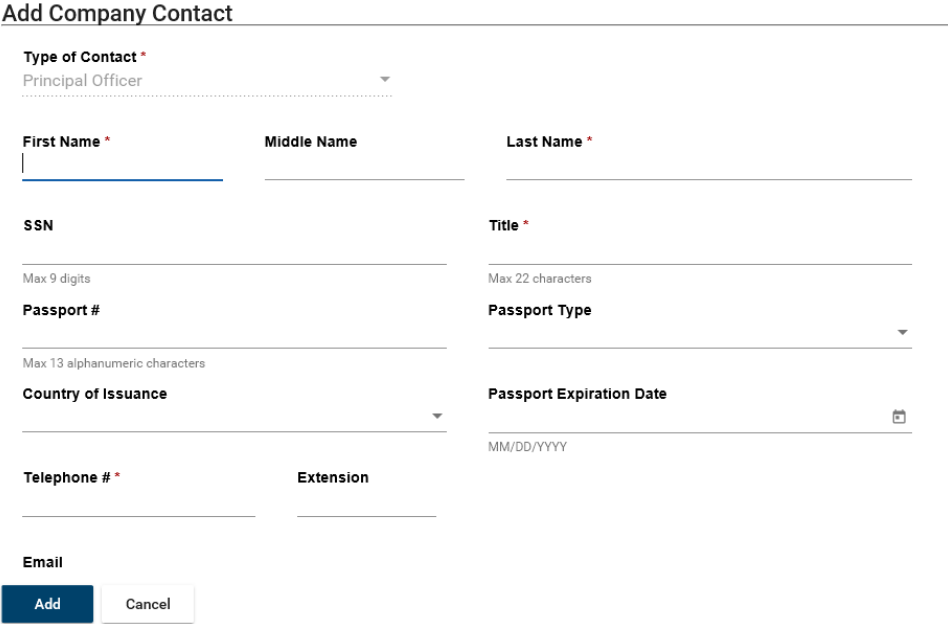



| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9.   | <p>In the <b>Additional Information</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Email Address *</b> field, type the importer's <i>point of contact (POC) email address</i>.</li> <li>In the <b>Website</b> field, type the importer's <i>website</i>.</li> <li>In the <b>Phone # *</b> field, type the <i>POC phone number</i>.</li> <li>In the <b>Extension #</b> field, type the <i>POC phone number extension</i>.</li> <li>In the <b>Fax #</b> field, type the <i>POC fax number</i>.</li> </ol>  |
| 10.  | <p>In the <b>Related Business Information</b> section, select the <b>Add new Related Business</b> icon <b>+</b> to add a new related business.</p>  <p>The <b>Add Related Business</b> dialog box displays.</p>                                                                                                                                                                                                                                                                                                           |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11.  | <p>In the <b>Add Related Business</b> dialog box:</p> <ol style="list-style-type: none"> <li>From the <b>Related Business Status</b> * drop-down menu, select the option for current or previous relationship.</li> <li>In the <b>Name of Business Entity</b> * field, type the <i>related business' name</i>.</li> <li>In the <b>TIN/EIN/SSN/CBP Assigned #</b> * field, type the <i>ID number of the related business</i>.</li> <li>Select the <b>Add</b> button.</li> </ol> <div data-bbox="272 632 906 1024" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Add Related Business</b></p> <p><b>Related Business Status</b> * <span style="float: right;">▼</span></p> <hr/> <p><b>Name of Business Entity</b> *</p> <hr/> <p><small>Max 100 Characters</small></p> <p><b>TIN/EIN/SSN/CBP Assigned #</b> *</p> <hr/> <p><small>Valid Formats: NN-NNNNNNXX, NNN-NN-NNNN or YYDDPP-NNNNN</small></p> <p><input type="button" value="Add"/> <input type="button" value="Cancel"/></p> </div> <p>The related business information displays in the <b>Related Business Information</b> table.</p> <p> <b>NOTE:</b> Select the <b>Edit Related Business</b> icon  to edit an existing business relationship or the <b>Delete Related Business</b> icon  to remove a business relationship.</p> |

| Step                                                                     | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                               |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
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| 12.                                                                      | <p>In the <b>Company Information</b> section, in the <b>Company Information</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>Business Description</b> field, type a <i>description of the business</i>.</li> <li>In the <b>Year Established</b> field, type the <i>4-digit year the business was established</i>.</li> <li>In the <b>NAICS Code</b> field, type the <i>North American Industry Classification System code</i>.</li> <li>In the <b>DUNS #</b> field, type the <i>Data Universal Numbering System number</i>.</li> <li>In the <b>Broker/Self Filer Code</b> field, type the importer's <i>broker or self-filer code</i>.</li> <li>From the <b>Certificate or Articles of Incorporation (Country)</b> drop-down menu, select the country where the importer is incorporated.</li> <li>From the <b>Certificate or Articles of Incorporation (State)</b> drop-down menu, select the state where the importer is incorporated.</li> <li>In the <b>Certificate or Articles of Incorporation (Reference #)</b> field, type the <i>incorporated reference number</i>.</li> <li>In the <b>FIRMS Code</b> field, type the <i>Facilities Information and Resources Management System code</i>.</li> <li>In the <b>SCAC Code</b> field, type the <i>Standard Carrier Alpha Code</i>.</li> </ol> <div data-bbox="256 1003 1463 1514" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Company Information</p> <hr/> <p>Company Information</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"><b>Business Description</b></td> <td style="width: 20%;"><b>Year Establish..</b></td> <td style="width: 20%;"></td> </tr> <tr> <td><hr/></td> <td><hr/></td> <td><hr/></td> </tr> <tr> <td><b>NAICS Code</b></td> <td><b>DUNS #</b></td> <td><b>Broker/Self Filer Code</b></td> </tr> <tr> <td><hr/></td> <td><hr/></td> <td><hr/></td> </tr> <tr> <td></td> <td></td> <td style="font-size: small;">Max 3 alphanumeric characters</td> </tr> <tr> <td><b>Certificate or Articles of Incorporation (C..</b><br/>Choose an option</td> <td><b>Certificate or Articles of Incorporation (State)</b><br/>Choose an option</td> <td><b>Certificate or Articles of Incorporation (Reference #)</b></td> </tr> <tr> <td><hr/></td> <td><hr/></td> <td><hr/></td> </tr> <tr> <td><b>FIRMS Code</b></td> <td><b>SCAC Code</b></td> <td></td> </tr> <tr> <td><hr/></td> <td><hr/></td> <td></td> </tr> <tr> <td style="font-size: small;">Max 4 alphanumeric characters</td> <td style="font-size: small;">Max 4 alphanumeric characters</td> <td></td> </tr> </table> </div> | <b>Business Description</b>                                   | <b>Year Establish..</b> |  | <hr/> | <hr/> | <hr/> | <b>NAICS Code</b> | <b>DUNS #</b> | <b>Broker/Self Filer Code</b> | <hr/> | <hr/> | <hr/> |  |  | Max 3 alphanumeric characters | <b>Certificate or Articles of Incorporation (C..</b><br>Choose an option | <b>Certificate or Articles of Incorporation (State)</b><br>Choose an option | <b>Certificate or Articles of Incorporation (Reference #)</b> | <hr/> | <hr/> | <hr/> | <b>FIRMS Code</b> | <b>SCAC Code</b> |  | <hr/> | <hr/> |  | Max 4 alphanumeric characters | Max 4 alphanumeric characters |  |
| <b>Business Description</b>                                              | <b>Year Establish..</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                               |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
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| <b>NAICS Code</b>                                                        | <b>DUNS #</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>Broker/Self Filer Code</b>                                 |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
| <hr/>                                                                    | <hr/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <hr/>                                                         |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
|                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Max 3 alphanumeric characters                                 |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
| <b>Certificate or Articles of Incorporation (C..</b><br>Choose an option | <b>Certificate or Articles of Incorporation (State)</b><br>Choose an option                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Certificate or Articles of Incorporation (Reference #)</b> |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
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| <b>FIRMS Code</b>                                                        | <b>SCAC Code</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                               |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
| <hr/>                                                                    | <hr/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                               |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |
| Max 4 alphanumeric characters                                            | Max 4 alphanumeric characters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                               |                         |  |       |       |       |                   |               |                               |       |       |       |  |  |                               |                                                                          |                                                                             |                                                               |       |       |       |                   |                  |  |       |       |  |                               |                               |  |



| Step            | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                 |            |              |          |              |          |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|------------|--------------|----------|--------------|----------|
| 13.             | <p>In the <b>Company Information</b> section, in the <b>Banking Information</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>Primary Bank Name</b> field, type the <i>name of the importer's primary bank</i>.</li> <li>In the <b>Bank Routing Number</b> field, type the <i>primary bank's routing number</i>.</li> <li>In the <b>Bank City</b> field, type the <i>city where the primary bank is located</i>.</li> <li>From the <b>Bank Country</b> drop-down menu, select the country where the importer's primary bank is located.</li> <li>From the <b>Bank State</b> drop-down menu, select the state where the importer's primary bank is located.</li> </ol> <div data-bbox="256 657 1458 909" style="border: 1px solid black; padding: 5px;"> <p>Banking Information</p> <p>Primary Bank Name <span style="float: right;">Bank Routing..</span></p> <hr/> <p>Bank City <span style="margin-left: 150px;">Bank Country</span> <span style="margin-left: 150px;">Bank State</span></p> <p style="margin-left: 150px;">Choose an option <span style="margin-left: 100px;">Choose an option</span></p> <p style="text-align: right; font-size: small;">Max 11 alphanumeric characters</p> </div> |                 |            |              |          |              |          |
| 14.             | <p>In the <b>Company Contact Information</b> section, select the <b>Add new Company Contact</b> icon <b>+</b>.</p> <p>▼ <u>Company Contact Information</u></p> <div data-bbox="279 1098 1453 1360" style="border: 1px solid black; padding: 10px;"> <p style="text-align: right;">Filter</p> <hr/> <table border="0" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%; text-align: center;">Type Of Contact</td> <td style="width: 20%; text-align: center;">First Name</td> <td style="width: 25%; text-align: center;">Last Name</td> <td style="width: 20%; text-align: center;">Title</td> <td style="width: 20%; text-align: center;">Phone Number</td> <td style="text-align: right; border: 2px solid red; padding: 2px;"><b>+</b></td> </tr> </table> <hr/> <p style="text-align: right;">Items per page: 10 <span style="margin-left: 20px;">0 of 0</span> <span style="margin-left: 20px;">◀ ▶</span></p> </div> <p>The <b>Add Company Contact</b> dialog box displays.</p>                                                                                                                                                                                                          | Type Of Contact | First Name | Last Name    | Title    | Phone Number | <b>+</b> |
| Type Of Contact | First Name                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Last Name       | Title      | Phone Number | <b>+</b> |              |          |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 15.  | <p>In the <b>Add Company Contact</b> dialog box:</p> <ol style="list-style-type: none"> <li>From the <b>Type of Contact *</b> drop-down menu, select the type of contact.</li> <li>In the <b>First Name *</b> field, type the <i>contact's first name</i>.</li> <li>In the <b>Middle Name</b> field, type the <i>contact's middle name</i>.</li> <li>In the <b>Last Name *</b> field, type the <i>contact's last name</i>.</li> <li>In the <b>SSN</b> field, type the <i>contact's social security number</i>.</li> <li>In the <b>Title *</b> field, type the <i>contact's title</i>.</li> <li>In the <b>Passport #</b> field, type the <i>contact's passport number</i>.</li> <li>From the <b>Passport Type</b> drop-down menu, select the contact's passport type.</li> <li>From the <b>Country of Issuance</b> drop-down menu, select the country that issued the contact's passport.</li> <li>In the <b>Passport Expiration Date</b> field, type the <i>expiration date of the contact's passport</i>.</li> <li>In the <b>Telephone # *</b> field, type the <i>contact's telephone number</i>.</li> <li>In the <b>Extension</b> field, type the <i>contact's telephone extension number</i>.</li> <li>In the <b>Email</b> field, type the <i>contact's email address</i>.</li> <li>Select the <b>Add</b> button.</li> </ol> <p><b>Add Company Contact</b></p>  <p>The company contact displays in the <b>Company Contact Information</b> table.</p> <p> <b>NOTE:</b> Select the <b>Edit Related Business</b> icon  to edit an existing company contact or the <b>Delete Related Business</b> icon  to remove a company contact.</p> |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 16.  | <p>In the <b>Certification Information</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Certify Individual’s Full Name *</b> field, type the <i>full name of the individual certifying the information on the form</i>.</li> <li>In the <b>Certify Individual’s Title *</b> field, type the <i>title of the certifying individual</i>.</li> <li>In the <b>Certify Individual’s Phone</b> field, type the <i>phone number of the certifying individual</i>.</li> <li>In the <b>Broker’s Name</b> field, type the <i>broker’s name</i>.</li> <li>In the <b>Broker’s Phone</b> field, type the <i>broker’s phone number</i>.</li> <li>In the <b>Electronic Signature *</b> field, select the <b>Yes</b> or <b>No</b> checkbox.</li> </ol> <p>∨ Certification Information</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>A filer who transmits data or information through any electronic means to CBP certifies, the data or information transmitted is true, correct, and provided in good faith. The filer certifies that if there is intentionally false data, or commits deception or fraud in the 5106 submission, that the filer will be fined or imprisoned (18 U.S.C. § 1001).</p> <p>Certify Individual's Full Name *</p> <hr/> <p>Certify Individual's Title *                      Certify Individual's Phone</p> <hr/> <p>Broker's Name</p> <hr/> <p>Broker's Phone</p> <hr/> <p><input type="checkbox"/> Electronic Signature *</p> </div> <p style="text-align: right;"> <span style="background-color: #0056b3; color: white; padding: 2px 5px; border-radius: 3px;">Preview</span> <span style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 10px;">Clear</span> </p> |
| 17.  | <p>Select the <b>Preview</b> button.</p> <p>A preview of the completed Importer Account form displays.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 18.  | <p>Select the <b>Submit</b> button.</p> <p>A confirmation dialog-box displays.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 19.  | <p>Select the <b>OK</b> button.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

## TOPIC 3: EDIT AN IMPORTER ACCOUNT

### INTRODUCTION

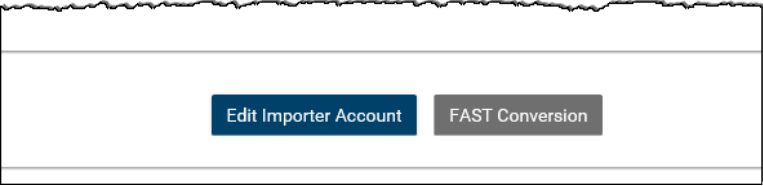

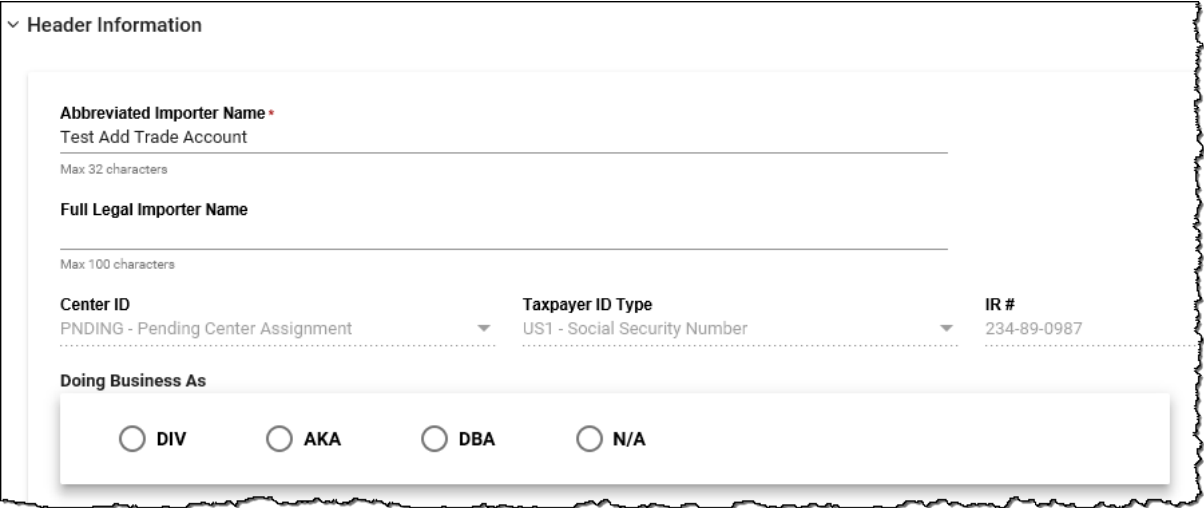
Users with the **Trade User** role are able to edit an importer account's information. After locating an account through the ACE Secure Data Portal and opening the new **Importer Accounts** application, you can edit the information found on the **Account**, **Contacts**, **Address**, and **Brokers** tabs.

For directions on how to log into the ACE Secure Data Portal, visit the **ACE Training and Reference Guides** webpage at <https://www.cbp.gov/trade/ace/training-and-reference-guides#portal> and select the **Account – Initial Access** hyperlink.

### EDIT IMPORT ACCOUNT INFORMATION

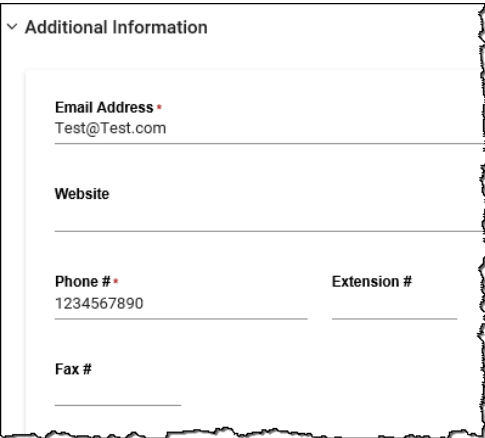

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Select the <b>Accounts</b> tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 2.   | In the <b>Task Selector</b> panel: <ol style="list-style-type: none"> <li>a. Select <b>Importer</b> from the <b>View</b> drop-down menu.</li> <li>b. Select the <b>GO</b> button.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 3.   | In the <b>Account Selector List</b> panel, in the <b>Accounts</b> subsection, select the account hyperlink.<br>The <b>View Top Account</b> and <b>Importer</b> panels appear for the selected importer account.                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 4.   | In the <b>Importer</b> panel, select the <b>View Importer in New ACE</b> button.<br>The <b>Importer Accounts</b> application opens in a new browser tab with the importer's information. The <b>Account</b> tab is selected by default and displays the importer's: <ol style="list-style-type: none"> <li>a. <b>Header Information</b></li> <li>b. <b>Additional Information</b></li> <li>c. <b>Related Business Information</b></li> <li>d. <b>Company Information</b></li> <li>e. <b>Partnership Information</b></li> <li>f. <b>Administration Control Information</b></li> <li>g. <b>Certification Information</b></li> </ol> |






| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5.   | <p>Select the <b>Edit Importer Account</b> button at the bottom.</p>  <p>The <b>Account</b> tab opens in edit mode.</p>                                                                                                                                                                                                                                                                                                                                                                                                                |
| 6.   | <p>In the <b>Header Information</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Abbreviated Importer Name *</b> field, type a <i>shortened importer name</i>.</li> <li>In the <b>Full Legal Import Name</b> field, type the <i>full legal name of importer</i>.</li> <li>Select an option from the <b>Doing Business As</b> field.</li> </ol> <p> <b>NOTE: Center ID, Taxpayer ID Type, and IR # fields cannot be edited.</b></p>  |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| 7.   | <p>In the <b>Header Information</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>DIV/AKA/DBA Name</b> field, type the <i>division name, also known name, or other name</i> of importer.</li> <li>From the <b>Type of Company *</b> drop-down menu, select a company type.</li> <li>From the <b>Entries Planned Per Year</b> drop-down menu, select a value.</li> <li>In the <b>How ID will be utilized</b> field, select the checkbox(es) for all values that apply and/or type a value in the <b>Other – Explain</b> field.</li> <li>From the <b>Program Code</b> drop-down menu, select the checkbox(es) for all values that apply.</li> </ol> <div data-bbox="259 693 1453 1312" style="border: 1px solid black; padding: 5px;"> <p>DIV/AKA/DBA Name <span style="float: right;">Type of Company *<br/>C - Corporation</span> <span style="float: right;">Entries Planned Per Year<br/>1 - 1-4 Entries per Year</span></p> <p>Max 32 characters</p> <p>Request CBP Assigned IR # <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>If Yes, Check all that apply</p> <p><input type="checkbox"/> I have a SSN, but wish to use a CBP-Assigned Number on all my entry documents</p> <p><input type="checkbox"/> I have no SSN    <input type="checkbox"/> I have no IRS #    <input type="checkbox"/> I have not applied for IRS # or SSN    <input type="checkbox"/> I am not a U.S. Resident</p> <p>How ID will be utilized (Check all that apply)</p> <p><input checked="" type="checkbox"/> Importer of Record    <input type="checkbox"/> Consignee/Ultimate Consignee    <input type="checkbox"/> Drawback Claimant    <input type="checkbox"/> Refunds/Bills</p> <p><input type="checkbox"/> Other <span style="margin-left: 20px;">Other - Explain</span> _____</p> <p>Program Code<br/>Customs-Trade Partnership Against Terrorism</p> </div> |



| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8.   | <p>In the <b>Additional Information</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Email Address *</b> field, type the importer's <i>point of contact (POC) email address</i>.</li> <li>In the <b>Website</b> field, type the importer's <i>website</i>.</li> <li>In the <b>Phone # *</b> field, type the <i>POC phone number</i>.</li> <li>In the <b>Extension #</b> field, type the <i>POC phone number extension</i>.</li> <li>In the <b>Fax #</b> field, type the <i>POC fax number</i>.</li> </ol>  |
| 9.   | <p>In the <b>Related Business Information</b> section, select the <b>Add new Related Business</b> icon <b>+</b> to add a new related business.</p>  <p>The <b>Add Related Business</b> dialog box displays.</p>                                                                                                                                                                                                                                                                                                           |


| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| 10.  | <p>In the <b>Add Related Business</b> dialog box:</p> <ol style="list-style-type: none"> <li>From the <b>Related Business Status</b> * drop-down menu, select the option for current or previous relationship.</li> <li>In the <b>Name of Business Entity</b> * field, type the <i>related business' name</i>.</li> <li>In the <b>TIN/EIN/SSN/CBP Assigned #</b> * field, type the <i>ID number of the related business</i>.</li> <li>Select the <b>Add</b> button.</li> </ol> <div data-bbox="272 630 906 1024" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p><b>Add Related Business</b></p> <p><b>Related Business Status</b> *<br/>       _____</p> <p><b>Name of Business Entity</b> *<br/>       _____<br/> <small>Max 100 Characters</small></p> <p><b>TIN/EIN/SSN/CBP Assigned #</b> *<br/>       _____<br/> <small>Valid Formats: NN-NNNNNNNXX, NNN-NN-NNNN or YYDDPP-NNNNN</small></p> <p><b>Add</b>   <b>Cancel</b></p> </div> <p>The related business information displays in the <b>Related Business Information</b> table.</p> <p> <b>NOTE:</b> Select the <b>Edit Related Business</b> icon  to edit an existing business relationship or the <b>Delete Related Business</b> button  to remove a business relationship.</p> |



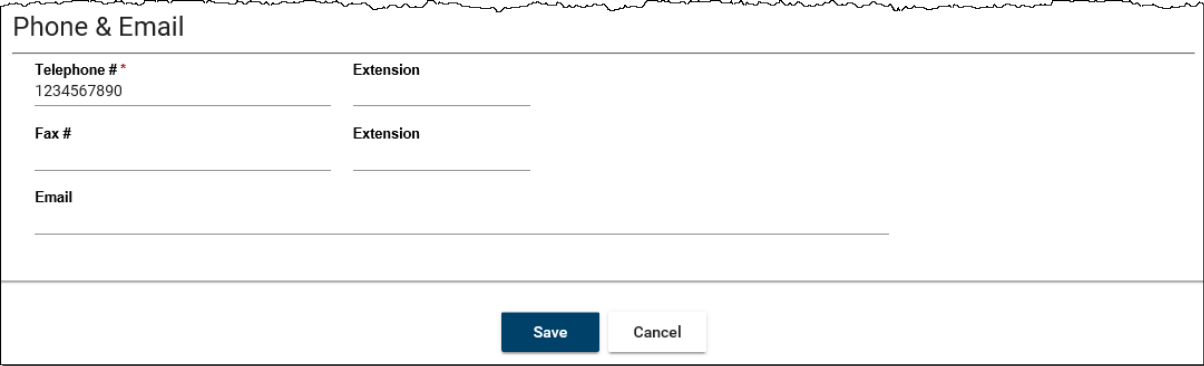



| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11.  | <p>In the <b>Company Information</b> section, in the <b>Company Information</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>Business Description</b> field, type a <i>description of the business</i>.</li> <li>In the <b>Year Established</b> field, type the <i>year the business was established</i>.</li> <li>In the <b>NAICS Code</b> field, type the <i>North American Industry Classification System code</i>.</li> <li>In the <b>DUNS #</b> field, type the <i>Data Universal Numbering System number</i>.</li> <li>In the <b>Broker/Self Filer Code</b> field, type the <i>importer's broker or self-filer code</i>.</li> <li>From the <b>Certificate or Articles of Incorporation (Country)</b> drop-down menu, select the country where the importer is incorporated.</li> <li>From the <b>Certificate or Articles of Incorporation (State)</b> drop-down menu, select the state where the importer is incorporated.</li> <li>In the <b>Certificate or Articles of Incorporation (Reference #)</b> field, type the <i>incorporated reference number</i>.</li> <li>In the <b>FIRMS Code</b> field, type the <i>Facilities Information and Resources Management System code</i>.</li> <li>In the <b>SCAC Code</b> field, type the <i>Standard Carrier Alpha Code</i>.</li> </ol> <div data-bbox="256 1003 1455 1497" style="border: 1px solid black; padding: 5px;"> <p>Company Information</p> <hr/> <p>Company Information</p> <p>Business Description <span style="float: right;">Year Established</span></p> <hr/> <p>NAICS Code <span style="margin-left: 150px;">DUNS #</span> <span style="float: right;">Broker/Self Filer Code</span></p> <p>33333 <span style="margin-left: 150px;">33333333</span> <span style="float: right;">333</span></p> <p><small>Max 3 alphanumeric characters</small></p> <p>Certificate or Articles of Incorporation (Co... <span style="margin-left: 50px;">Certificate or Articles of Incorporation (State)</span> <span style="float: right;">Certificate or Articles of Incorporation (Reference #)</span></p> <p>Choose an option <span style="margin-left: 50px;">Choose an option</span> <span style="float: right;"></span></p> <hr/> <p>FIRMS Code <span style="margin-left: 150px;">SCAC Code</span></p> <p>3333 <span style="margin-left: 150px;">3333</span></p> <p><small>Max 4 alphanumeric characters</small> <span style="margin-left: 150px;"><small>Max 4 alphanumeric characters</small></span></p> </div> |


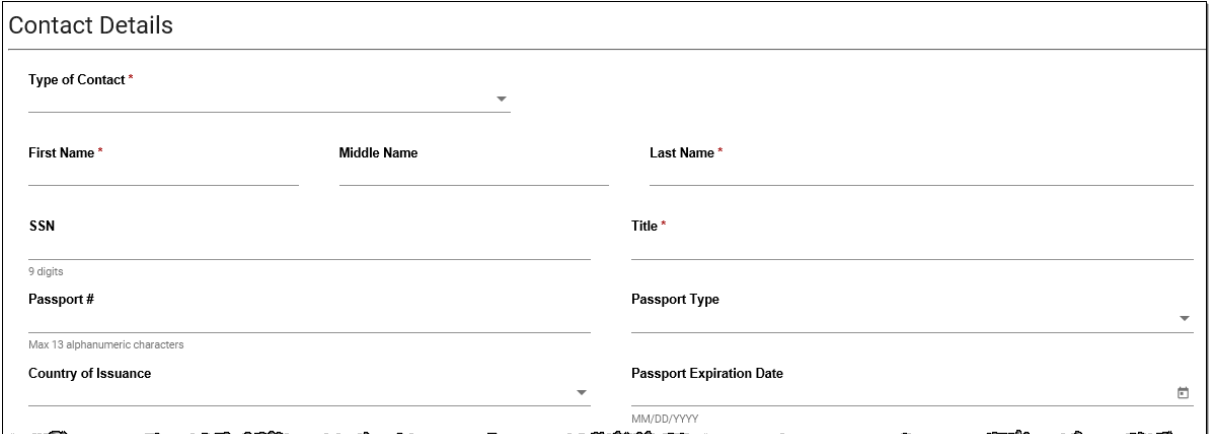
| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 12.  | <p>In the <b>Company Information</b> section, in the <b>Banking Information</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>Primary Bank Name</b> field, type the <i>name of the importer's primary bank</i>.</li> <li>In the <b>Bank Routing Number</b> field, type the <i>primary bank's routing number</i>.</li> <li>In the <b>Bank City</b> field, type the <i>city where the primary bank is located</i>.</li> <li>From the <b>Bank Country</b> drop-down menu, select the country where the importer's primary bank is located.</li> <li>From the <b>Bank State</b> drop-down menu, select the state where the importer's primary bank is located.</li> </ol> <div data-bbox="256 657 1458 909" style="border: 1px solid black; padding: 5px;"> <p>Banking Information</p> <p>Primary Bank Name <span style="float: right;">Bank Routing..</span></p> <hr/> <p>Bank City <span style="margin-left: 100px;">Bank Country</span> <span style="margin-left: 100px;">Bank State</span></p> <p><span style="margin-left: 100px;">Choose an option</span> <span style="margin-left: 100px;">Choose an option</span></p> <p style="text-align: right; font-size: small;">Max 11 alphanumeric characters</p> </div> |
| 13.  | <p>Select the <b>Preview</b> button.</p> <div data-bbox="256 1010 602 1115" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> <input type="button" value="Preview"/> <input type="button" value="Cancel"/> </p> </div> <p>A preview of the updated importer's <b>Account</b> tab information displays.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 14.  | <p>Select the <b>Submit</b> button to confirm the changes.</p> <div data-bbox="256 1255 558 1360" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> <input type="button" value="Submit"/> <input type="button" value="Cancel"/> </p> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

## EDIT CONTACTS INFORMATION

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Select the <b>Contacts</b> tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 2.   | To edit a contact, in the <b>List of Contact(s) and CBP Responsible User(s)</b> table, select the <b>Edit Company Contact</b> icon  .<br>The <b>Contact   Edit Contact</b> dialog-box displays.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 3.   | <p>In the <b>Contact   Edit Contact</b> dialog box, in the <b>Contact Information</b> section:</p> <ol style="list-style-type: none"> <li>From the <b>Type of Contact *</b> drop-down menu, select the type of contact.</li> <li>In the <b>SSN</b> field, type the contact's <i>social security number</i>.</li> <li>In the <b>Title *</b> field, type the contact's <i>title</i>.</li> <li>In the <b>Passport #</b> field, type the contact's <i>passport number</i>.</li> <li>From the <b>Passport Type</b> drop-down menu, select the contact's passport type.</li> <li>From the <b>Country of Issuance</b> drop-down menu, select the country that issued the contact's passport.</li> <li>In the <b>Passport Expiration Date</b> field, type the <i>expiration date</i> of the contact's passport.</li> </ol> <div data-bbox="256 1045 1458 1684" style="border: 1px solid black; padding: 5px;"> <p><b>Contact   Edit Contact   Contact ACE ID: 0000210379</b></p> <p>Contact Information</p> <p><b>Type of Contact *</b><br/>2 - Primary Point of Contact</p> <p>First Name TEST Middle Name Last Name TESTERTESTERTESTERTEST</p> <p><b>SSN</b> <b>Title *</b><br/>TESTESTES</p> <p>9 digits <b>Passport #</b> <b>Passport Type</b></p> <p>Max 13 alphanumeric characters <b>Country of Issuance</b> <b>Passport Expiration Date</b></p> <p>MM/DD/YYYY</p> <p>Contact Address</p> <p>C/O</p> <p>Max 40 characters (name of person or company)<br/>P.O. Box</p> </div> |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.   | <p>In the <b>Contact Address</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>C/O</b> field, type the <i>name</i> of a person or company.</li> <li>In the <b>P.O. Box</b> field, type the <i>Post Office number</i>.</li> <li>In the <b>Street Address Line 1</b> field, type the <i>street address</i>.</li> <li>In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>In the <b>City/Province *</b> field, type the <i>city/province</i>.</li> <li>From the <b>Country ISO Code *</b> drop-down menu, select the <i>country</i>.</li> <li>From the <b>State</b> drop-down menu, select the <i>state</i>.</li> <li>In the <b>Zip-Code *</b> field, type the <i>ZIP code</i>.</li> </ol> <div data-bbox="261 741 1458 1423" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><b>Contact Address</b></p> <hr/> <p><b>C/O</b><br/> <small>Max 40 characters (name of person or company)</small></p> <p><b>P.O. Box</b><br/> <small>.....</small></p> <hr/> <p><b>Street Address Line 1</b><br/>       1801 N BEAUREGARD ST<br/> <small>Max 64 characters</small></p> <hr/> <p><b>Street Address Line 2</b><br/> <small>Max 32 characters</small></p> <hr/> <p><b>City/Province *</b><br/>       ALEXANDRIA<br/> <small>Max 35 characters</small></p> <hr/> <p><b>Country ISO Code *</b>      <b>State</b><br/>       US - USA      ▼      VA - Virginia</p> <hr/> <p><b>Zip-Code *</b><br/>       22311-1701</p> </div> |


| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5.   | <p>In the <b>Phone &amp; Email</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Telephone # *</b> field, type the contact's <i>telephone number</i>.</li> <li>In the <b>Extension</b> field, type the contact's <i>telephone extension number</i>.</li> <li>In the <b>Fax #</b> field, type the contact's <i>Fax number</i>.</li> <li>In the <b>Extension</b> field, type the contact's <i>Fax extension number</i>.</li> <li>In the <b>Email</b> field, type the contact's <i>email address</i>.</li> </ol>                          |
| 6.   | <p>Select the <b>Save</b> button.</p> <p>The updated company contact displays in the <b>List of Contact(s) and CBP Responsible User(s)</b> table.</p>  <p><b>NOTE:</b> Select the <b>Cancel</b> button to cancel making changes to a contact.</p>                                                                                                                                                                                                                                                                                                     |
| 7.   | <p>To delete a contact, in the <b>List of Contact(s) and CBP Responsible User(s)</b> table:</p> <ol style="list-style-type: none"> <li>Select the <b>Delete Company Contact</b> icon .</li> </ol> <p>The <b>Contact   Delete Contact</b> dialog box displays.</p> <ol style="list-style-type: none"> <li>Select the <b>Delete</b> button.</li> </ol>  <p>The company contact is removed from the <b>List of Contact(s) and CBP Responsible User(s)</b> table.</p> |


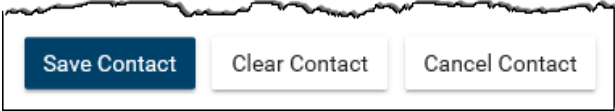
| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8.   | <p>To add a new company contact, select the <b>Add Contact</b> button.</p>  <p>The <b>Add Contact</b> section displays.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 9.   | <p>In the <b>Contact Details</b> subsection:</p> <ol style="list-style-type: none"> <li>From the <b>Type of Contact *</b> drop-down menu, select the type of contact.</li> <li>In the <b>First Name *</b> field, type the contact's <i>first name</i>.</li> <li>In the <b>Middle Name</b> field, type the contact's <i>middle name</i>.</li> <li>In the <b>Last Name *</b> field, type the contact's <i>last name</i>.</li> <li>In the <b>SSN</b> field, type the contact's <i>social security number</i>.</li> <li>In the <b>Title *</b> field, type the contact's <i>title</i>.</li> <li>In the <b>Passport #</b> field, type the contact's <i>passport number</i>.</li> <li>From the <b>Passport Type</b> drop-down menu, select the contact's passport type.</li> <li>From the <b>Country of Issuance</b> drop-down menu, select the country that issued the contact's passport.</li> <li>In the <b>Passport Expiration Date</b> field, type the <i>expiration date of the contact's passport</i>.</li> </ol>  |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10.  | <p>In the <b>Person Address</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>C/O</b> field, type the <i>name</i> of a person or company.</li> <li>In the <b>P.O. Box *</b> field, type the <i>Post Office number</i>.</li> <li>In the <b>Street Address Line 1 *</b> field, type the <i>street address</i>.</li> <li>In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>In the <b>City/Province*</b> field, type the <i>city/province</i>.</li> <li>From the <b>Country ISO Code *</b> drop-down menu, select the country.</li> <li>From the <b>State</b> drop-down menu, select the state.</li> <li>In the <b>Zip-Code *</b> field, type the <i>ZIP code</i>.</li> </ol> <div data-bbox="261 741 1458 1436" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p>Person Address</p> <hr/> <p>C/O</p> <hr/> <p><small>Max 40 characters (name of person or company)</small></p> <p>P.O. Box *</p> <hr/> <p>Street Address Line 1 *</p> <hr/> <p><small>Max 64 characters</small></p> <p>Street Address Line 2</p> <hr/> <p><small>Max 32 characters</small></p> <p>City/Province *</p> <hr/> <p><small>Max 35 characters</small></p> <p>Country ISO Code * <span style="float: right;">State</span></p> <p><small>Choose an option</small> <span style="float: right;"><small>Choose an option</small></span></p> <hr/> <p>Zip-Code *</p> <hr/> </div> |

| Step          | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |               |           |       |           |       |  |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-----------|-------|-----------|-------|--|
| 11.           | <p>In the <b>Phone &amp; Email</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>Telephone # *</b> field, type the contact's <i>telephone number</i>.</li> <li>In the <b>Extension</b> field, type the contact's <i>telephone extension number</i>.</li> <li>In the <b>Fax #</b> field, type the contact's <i>FAX number</i>.</li> <li>In the <b>Extension</b> field, type the contact's <i>FAX extension number</i>.</li> <li>In the <b>Email</b> field, type the contact's <i>email address</i>.</li> </ol> <div data-bbox="256 592 951 894" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Phone &amp; Email</b></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; border-bottom: 1px solid black; padding: 2px 5px;">Telephone # *</td> <td style="width: 50%; border-bottom: 1px solid black; padding: 2px 5px;">Extension</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding: 2px 5px;">Fax #</td> <td style="border-bottom: 1px solid black; padding: 2px 5px;">Extension</td> </tr> <tr> <td colspan="2" style="border-bottom: 1px solid black; padding: 2px 5px;">Email</td> </tr> </table> </div> | Telephone # * | Extension | Fax # | Extension | Email |  |
| Telephone # * | Extension                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |               |           |       |           |       |  |
| Fax #         | Extension                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |               |           |       |           |       |  |
| Email         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |               |           |       |           |       |  |




| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 12.  | <p>In the <b>Contact Address</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>C/O</b> field, type the <i>name</i> of a person or company.</li> <li>In the <b>P.O. Box *</b> field, type the <i>Post Office number</i>.</li> <li>In the <b>Street Address Line 1 *</b> field, type the <i>street address</i>.</li> <li>In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>In the <b>City/Province *</b> field, type the <i>city/province</i>.</li> <li>From the <b>Country ISO Code *</b> drop-down menu, select the country.</li> <li>From the <b>State</b> drop-down menu, select the state.</li> <li>In the <b>Zip-Code *</b> field, type the <i>ZIP code</i>.</li> </ol> <p> <b>TIP:</b> Select the <b>Copy Person Address</b> button to populate the <b>Contact Address</b> subsection fields with the contact's personal address.</p> <div data-bbox="256 871 982 1438" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;">Copy Person Address</p> <hr/> <p>Contact Address</p> <p>C/O<br/> <small>Max 40 characters (name of person or company)</small></p> <p>P.O. Box *</p> <p>Street Address Line 1 *<br/> <small>Max 64 characters</small></p> <p>Street Address Line 2<br/> <small>Max 32 characters</small></p> <p>City/Province *<br/> <small>Max 35 characters</small></p> <p>Country ISO Code *      State<br/> <small>Choose an option      Choose an option</small></p> <p>Zip-Code *</p> </div> |
| 13.  | <p>In the <b>Phone &amp; Email</b> subsection:</p> <ol style="list-style-type: none"> <li>In the <b>Telephone # *</b> field, type the contact's <i>telephone number</i>.</li> <li>In the <b>Extension</b> field, type the contact's <i>telephone extension number</i>.</li> <li>In the <b>Fax #</b> field, type the contact's <i>FAX number</i>.</li> <li>In the <b>Extension</b> field, type the contact's <i>FAX extension number</i>.</li> <li>In the <b>Email</b> field, type the contact's <i>email address</i>.</li> </ol>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |


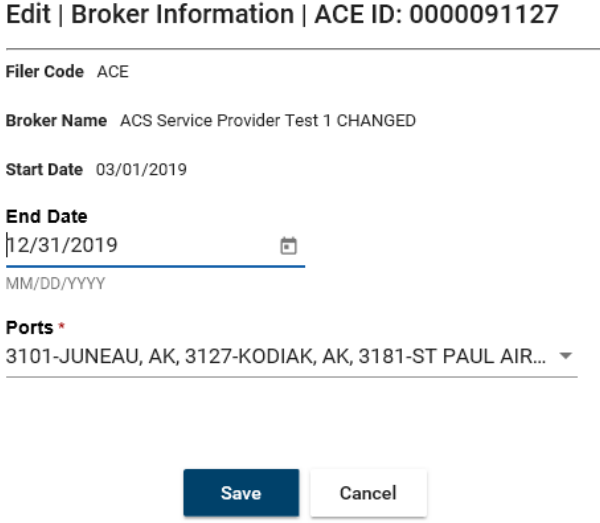

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 14.  | <p>Select the <b>Save Contact</b> button.</p> <p> <b>NOTE:</b> Select the <b>Clear Contact</b> button to clear the entered contact information for the new contact. Select the <b>Cancel Contact</b> button to cancel adding a new contact.</p> <div data-bbox="259 485 870 594"></div> |
| 15.  | <p>Select <b>OK</b> in confirmation dialog box.</p> <p>The new company contact displays in the <b>List of Contact(s) and CBP Responsible User(s)</b> table.</p>                                                                                                                                                                                                                                                                                           |

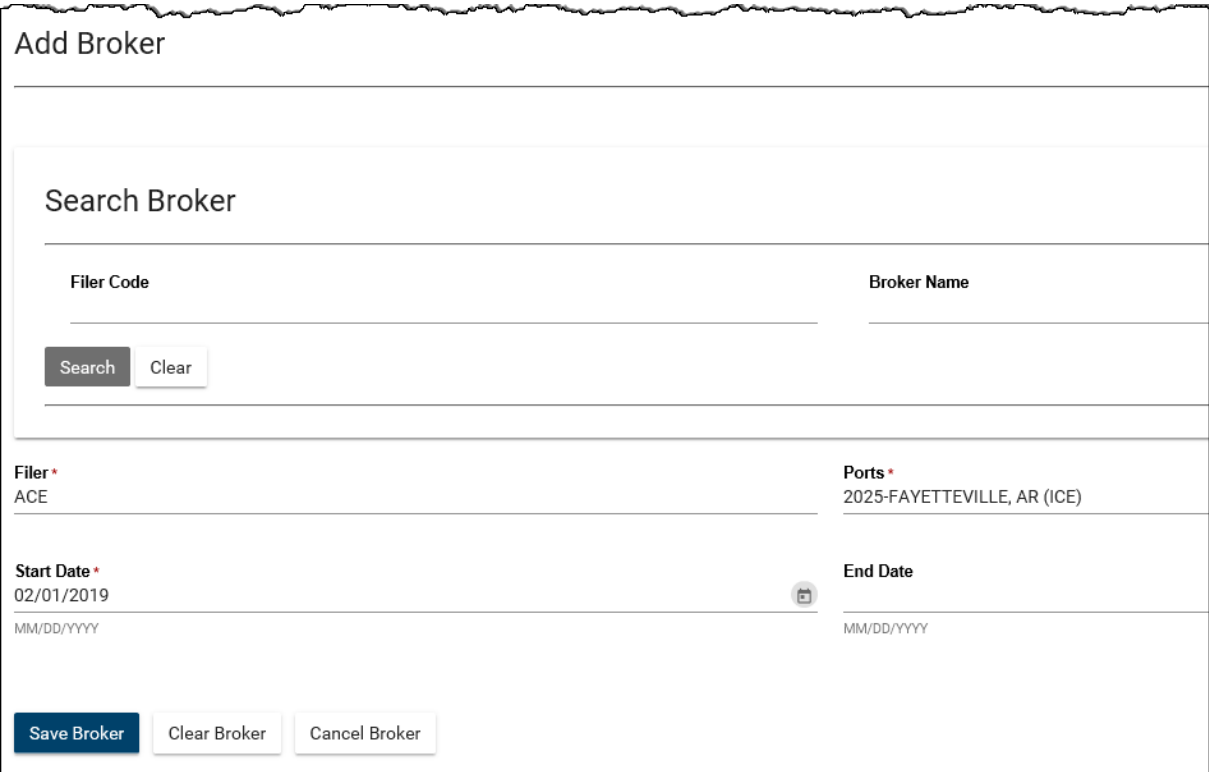

**EDIT ADDRESS INFORMATION**

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Select the <b>Address</b> tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 2.   | Select the <b>Edit</b> button.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 3.   | <p>In the <b>Mailing Address</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Street Address Line 1 *</b> field, type the <i>street address</i>.</li> <li>In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>In the <b>City/Province *</b> field, type the <i>city/province</i>.</li> <li>From the <b>Country ISO Code *</b> drop-down menu, select the country.</li> <li>From the <b>State</b> drop-down menu, select the state.</li> <li>In the <b>Zip-Code</b> field, type the <i>ZIP code</i>.</li> <li>From the <b>Address Type *</b> drop-down menu, select the type of address entered.</li> <li>If the address type is <b>8 – Other</b>, in the <b>Other Explain</b> field, type an <i>explanation of the other address type</i>.</li> <li>Select the <b>Save</b> button.</li> </ol> <div data-bbox="256 1020 1458 1766" style="border: 1px solid black; padding: 10px;"> <p><b>Mailing Address</b></p> <p>P.O. Box<br/>       .....</p> <p><b>Street Address Line 1 *</b><br/>       1801 N Beauregard Street<br/> <small>Max 64 characters</small></p> <p><b>Street Address Line 2</b><br/>       .....<br/> <small>Max 32 characters</small></p> <p><b>City/Province *</b><br/>       ALEXANDRIA<br/> <small>Max 35 characters</small></p> <p><b>Country ISO Code *</b> US - USA      <b>State</b> VA - Virginia</p> <p><b>Zip-Code</b> 22311-1701      <b>Address Type *</b> 1 - Residence</p> <p><b>Other Explain</b><br/>       Input Only Allowed on Address Type of Other<br/>       .....</p> <p style="text-align: right;"><b>Save</b></p> </div> |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4.   | <p>In the <b>Physical Address</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Street Address Line 1 *</b> field, type the <i>street address</i>.</li> <li>In the <b>Street Address Line 2</b> field, type the <i>second line of street address</i>.</li> <li>In the <b>City/Province *</b> field, type the <i>city/province</i>.</li> <li>From the <b>Country ISO Code *</b> drop-down menu, select the country.</li> <li>From the <b>State</b> drop-down menu, select the state.</li> <li>In the <b>Zip-Code</b> field, type the <i>ZIP code</i>.</li> <li>From the <b>Address Type *</b> drop-down menu, select the type of address entered.</li> <li>If address type is "Other", in the <b>Other Explain</b> field, type an <i>explanation of the other address type</i>.</li> <li>Select the <b>Save</b> button.</li> </ol> <p> <b>TIP:</b> Select the <b>Copy Mailing Address</b> button to populate the <b>Physical Address</b> subsection fields with the importer's mailing address.</p> <div data-bbox="259 961 1458 1801" style="border: 1px solid black; padding: 10px;"> <p><b>Physical Address</b></p> <p><input type="button" value="Copy Mailing Address"/></p> <p><b>Street Address Line 1 *</b><br/>       1801 N Beauregard Street<br/> <small>Max 64 characters</small></p> <p><b>Street Address Line 2</b><br/> <small>Max 32 characters</small></p> <p><b>City/Province *</b><br/>       ALEXANDRIA<br/> <small>Max 35 characters</small></p> <p><b>Country ISO Code *</b>      <b>State</b><br/>       US - USA      VA - Virginia</p> <p><b>Zip-Code</b>      <b>Address Type *</b><br/>       22311-1701      1 - Residence</p> <p><b>Other Explain</b><br/> <small>Input Only Allowed on Address Type of Other</small></p> <p style="text-align: center;"><input type="button" value="Save"/></p> <p style="text-align: center;"><input type="button" value="Cancel"/></p> </div> |

**EDIT BROKERS INFORMATION**

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1.   | Select the <b>Brokers</b> tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| 2.   | To edit a broker, in the <b>Brokers</b> table, select the <b>Edit Broker Relationship</b> icon  . The <b>Edit   Broker Information</b> dialog-box displays.                                                                                                                                                                                                                                                                                           |
| 3.   | <p>In the <b>Edit   Broker Information</b> dialog box:</p> <ol style="list-style-type: none"> <li>In the <b>End Date</b> field, type a new <i>end date</i> for the broker.</li> <li>From the <b>Ports *</b> drop-down menu, select one or more ports.</li> <li>Select the <b>Save</b> button.</li> <li>Select the <b>OK</b> button in the confirmation dialog box.</li> </ol>  <p>The broker's information is updated in the <b>Brokers</b> table.</p> |
| 4.   | <p>To add a new broker, select the <b>Add Broker</b> button.</p> <p>The <b>Add Broker</b> section displays.</p>                                                                                                                                                                                                                                                                                                                                       |

| Step | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5.   | <p>In the <b>Add Broker</b> section:</p> <ol style="list-style-type: none"> <li>In the <b>Filer *</b> field, type the broker's <i>filer code</i>.</li> <li>From the <b>Ports*</b> drop-down menu, select one or more ports.</li> <li>In the <b>Start Date *</b> field, type a <i>start date</i>.</li> <li>In the <b>End Date</b> field, type an <i>end date</i>.</li> </ol>  |
| 6.   | <p>Select the <b>Save Broker</b> button.</p> <p>The new broker displays in the <b>Brokers</b> table.</p> <p> <b>NOTE:</b> Select the <b>Clear Broker</b> button to clear the entered information for the new broker. Select the <b>Cancel Broker</b> button to cancel adding a new broker.</p>                                                                               |