ACE Truck e-Manifest - Trade

Bill of Lading Template

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U.S. Customs and Border Protection

INTRODUCTION

The Truck Manifest Trade Portal now allows creating a template for a bill of lading (BOL). For carriers that repeatedly utilize the same shippers and consignees, the bill of lading template allows creating a shell of this repetitive information. Then, a bill of lading can be created from the bill of lading template.

The **Create** menu includes an option for **Templates**. The process to create a **Bill of Lading Template** still includes the **Commercial Parties** and **Review** steps but not the **Commodities** step. In addition, fields that are not repeated are not available in the template. An existing BOL can also be used to create a bill of lading template. In the **Bill of Lading** tab, the **Actions** menu for a BOL record allows saving that bill of lading as a template. Bill of lading templates are accessed in the **Account** tab, in the **Bill of Lading Templates** subtab.

The process to create a BOL from a bill of lading template uses the **Create from Template** option in the **Bill of Lading** submenu of the **Create** menu. The fields not completed in the template are completed in the bill of lading, the Commodity(s) is added, and any other needed adjustments are made.

Reference the Create a Bill of Lading Guide for additional details on creating a bill of lading and adding shippers and consignees.

CREATE A NEW BILL OF LADING TEMPLATE

1. At the top of the **Truck Manifest Trade Portal**, select the **Create** button to display the **Create** drop-down menu.

2. In the **Create** drop-down menu, select **Templates**.

3. In the **Templates** menu, select **Bill of Lading**.

   The **Create Bill of Lading Template** landing page displays.
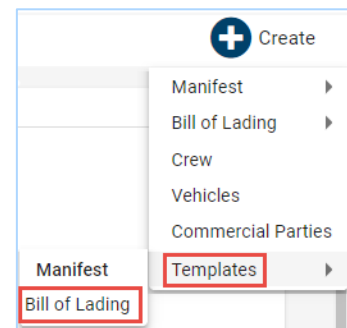
4. In the **Create Bill of Lading Template** landing page, in the **Header** section, complete the header information. Fields not available in the template are dotted and cannot be entered. The required fields depend on the type of bill of lading selected.

Header

Bill Issuer SCAC *	Bill of Lading Number	House Bill of Lading Number	Bill of Lading Type *
ZZZZ - SCAC Code ZZZZ Spring	ZZZZ BOL Number must be uniqu		

Estimated Date of Arrival	Estimated Time of Arrival *	Estimated Arrival Port *	Port of Lading *
MM/DD/YYYY	Local Time in HH:MM format		

Place of Receipt	Authorized SCAC	Is this subject to FDA requirements? *
		○ Yes ○ No

5. Select the **Next** button.

   The **Commercial Parties** step displays.

6. In the **Commercial Parties** section:

    a. Select the checkbox of the shipper(s) and consignee(s) to add to the bill of lading template.

    b. If appropriate, select the **Create** button to add a new commercial party. Complete the shipper and/or consignee information. The new shipper and/or consignee also saves to the carrier account by default and can be accessed in the **Account** tab. Thus, one-time shippers and consignees cannot be added to the template.

7. If appropriate, in the **Secondary Notify Party** section, complete the party information.

8. Select the **Next** button.

    The **Review** step displays.

9. In the **Review** step, review all BOL template information and complete any necessary edits.

10. At the bottom, in the **Template Name** * field, type a *name for the BOL template*.

11. If appropriate, in the **Template Description** field, type a *brief description for the BOL template*.

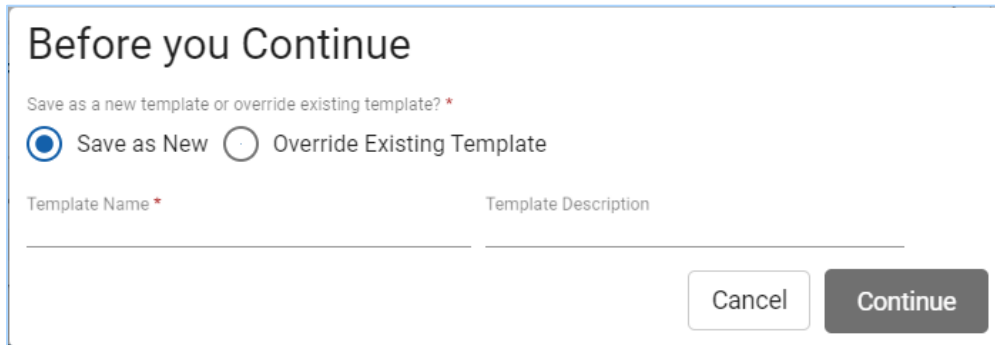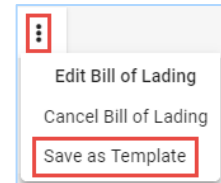12. Select the **Save** button to save the bill of lading template.

SAVE A BILL OF LADING AS A BILL OF LADING TEMPLATE

1. At the top of the **Truck Manifest Trade Portal**, select the **Bill of Lading** tab to display the **Bill of Lading List** page.

2. Locate the bill of lading to save as a bill of lading template.

3. To the far right of the bill of lading record, select the **Actions** icon ⋮.

4. In the **Actions** drop-down menu, select **Save as Template**.

   The **Before you Continue** dialog box displays.

5. In the **Before you Continue** dialog box:

   a. To save this bill of lading as a new bill of lading template:

      i. The **Save as New** radio button is selected by default.

      ii. In the **Template Name** * field, type a *name for the bill of lading template*.
         A list of the current template names displays to avoid duplication.

      iii. If appropriate, in the **Template Description** field, type a *brief description for the new template*.

   b. To replace an existing bill of lading template and override it:

      i. Select the **Override Existing Template** radio button.

      ii. Select the **Template** * field and the drop-down menu of existing templates displays.

      iii. Select the existing template to override from the list.

   c. Select the **Continue** button.

      The **Header** step of the bill of lading template displays.

6. In the **Header** step, complete any necessary edits and select the **Next** button.

7. In the **Commercial Parties** step, complete any necessary edits and select the **Next** button.

8. In the **Review** step of the bill of lading template:

   a. Review all bill of lading template information and complete any necessary edits.

   b. Select the **Save** button.

CREATE A BILL OF LADING FROM A BILL OF LADING TEMPLATE

1. At the top of the **Truck Manifest Trade Portal**, select the **Create** button to display the **Create** drop-down menu.

2. In the **Create** drop-down menu, select **Bill of Lading**.

3. In the **Bill of Lading** menu, select **Create from Template**.

    The **Select Bill of Lading Template** dialog box displays.

4. In the **Template** field:

    a. Type the *full or partial name of the desired bill of lading template(s)* and the drop-down menu of matching bill of lading template(s) displays.

    b. Select the bill of lading template from the list.

5. Select the **Continue** button.

    The **Create BOL** landing page displays.

6. In the **Create BOL** landing page, in the **Header** section, complete the additional header fields and if necessary, edit fields from the template.

7. Select the **Next** button.

    The **Commercial Parties** step displays. The shipper and consignee from the template are selected and highlighted.

8. In the **Commercial Parties** section:

    a. If necessary, select the checkbox of the template commercial party(s) to deselect and remove the current shipper(s) and/or consignee(s) to allow changing the commercial party(s) to a different shipper(s) and/or consignee(s).

    b. If appropriate, the **Create** button can be used to add a new shipper or consignee.

    c. If necessary, in the **Secondary Notify Party** section, update the party information.

9. Select the **Next** button.

    The **Commodities** step displays. Commodities must be added to the bill of lading since they are not part of the BOL template.

10. In the **Commodities** section:

    a. Select the **Create** button to add a new commodity.
        The **Add Commodities** section displays.

    b. Complete the cargo information. Additional fields may display for certain BOL types.

    c. In the **Where's Your Commodity** section, select the commodity location from the drop-down menu and complete any location related fields.

    d. For **Does your Commodity include any of the following?**, select the check box(s) and complete any related fields.

    e. Select the **Add** button.

11. If appropriate, add additional commodities.

12. Select the **Next** button.

    The **Review** step displays.

13. In the **Review** step:

    a. Review all bill of lading information and complete any necessary edits.

    b. To save this BOL as a bill of lading template:

        i. At lower left, for **Save as Template?**, select the **Yes** radio button.

        ii. Select the **Template Name** * field and type a *name for a new BOL template* or select a current template name from the list to override an existing BOL template.
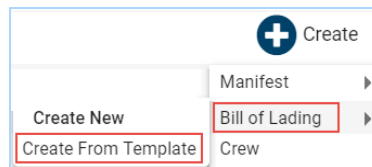
iii. If appropriate, in the **Template Description** field, type a *brief description for the BOL template*.

c. To save the BOL and create another BOL, select the **Save and Create Another** button.

d. To save the bill of lading, select the **Save** button.

PROCESS BILL OF LADING TEMPLATES IN ACCOUNT TAB

1. At the top of the **Truck Manifest Trade Portal**, select the **Account** tab.

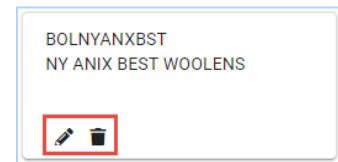2. On the left, select the **Bill of Lading Templates** subtab.

   The bill of lading templates currently associated with the carrier account display.
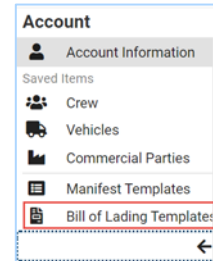
3. To locate a specific bill of lading template(s), select the **Search Saved BOL Templates** field and type a *partial or complete template name or description*.
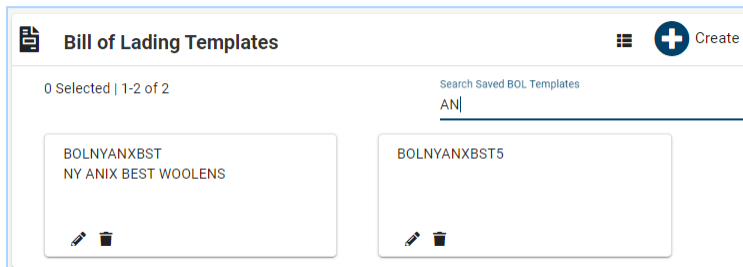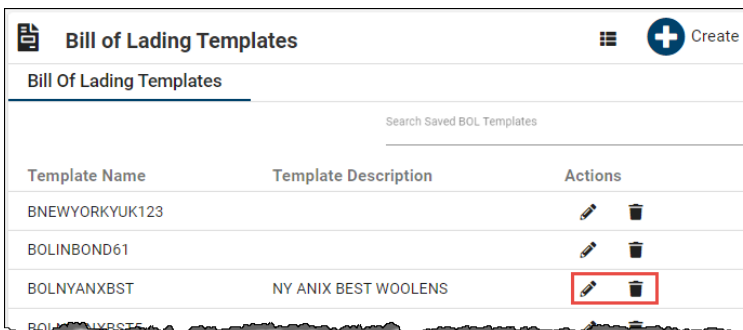

4. In a **Bill of Lading Template** card:

   a. Select the **Edit** icon ✏ to edit the bill of lading template.

   b. Select the **Delete** icon 🗑 to delete the bill of lading template.

5. In the upper right of the section, select the **Table View** icon ▦.
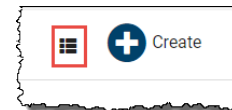
6. In the table view list, in the **Actions** column, the edit and delete icons allow editing or deleting the bill of lading template.

NOTE: A new bill of lading template can be created from an existing bill of lading template by editing the bill of lading template, changing the **Template Name** * at the bottom of the page, and selecting the **Save** button.