ACE Truck e-Manifest - Trade

Manifest Template

October 2020

U.S. Customs and Border Protection

INTRODUCTION

The Truck Manifest Trade Portal now allows creating a template for a manifest. For carriers that repeatedly utilize the same crew and vehicles, the manifest template allows creating a shell of this repetitive information. Then, a manifest can be created from the manifest template.

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

The process to create a manifest from a manifest template uses the **Create from Template** option in the **Manifest** submenu of the **Create** menu. The fields not completed in the template are completed in the manifest, the BOL is added if appropriate, and any other needed adjustments are made.

Reference the [Create a Manifest Guide](#) for additional details on creating a manifest and adding crew and vehicles.

CREATE A NEW MANIFEST 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 **Manifest**.
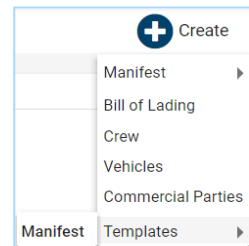
   The **Create Manifest Template** landing page displays.

4. In the **Create Manifest Template** landing page, in the **Header** section, complete the header information. Fields not available in the template are dotted and cannot be entered.

5. Select the **Next** button.

   The **Crew** step displays.

6. In the **Crew** section:
    a. Select the checkbox of the crewmember(s) to add to the manifest template.
    b. If appropriate, select the **Create** button to add a new driver (passengers and FAST ID drivers cannot be added to the template). Complete the crew and license plate information. The new driver also saves to the carrier account by default and can be accessed in the **Account** tab. Thus, one-time drivers cannot be added to the template.

7. In the **US Destination Address** section, complete the address information.

8. Select the **Next** button.

    The **Vehicles** step displays.

9. In the **Vehicles** section:
    a. Select the checkbox of the vehicle(s) to add to the manifest template.
    b. If appropriate, select the **Create** button to add a new conveyance or equipment. Complete the vehicle and if appropriate, insurance information. The seal section is not available and does not display. The new vehicle also saves to the carrier account by default and can be accessed in the **Account** tab. Thus, one-time vehicles cannot be added to the template.

10. Select the **Next** button.

    The **Review** step displays.

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

12. At the bottom, in the **Template Name** * field, type a *name for the manifest template*.

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

14. Select the **Save** button to save the manifest template.

SAVE A MANIFEST AS A MANIFEST TEMPLATE

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

2. Locate the manifest to save as a manifest template.

3. To the far right of the manifest record, select the **Actions** icon.

4. In the **Actions** drop-down menu, select **Save as Template**.
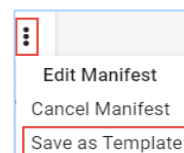
   The **Before you Continue** dialog box displays.

5. In the **Before you Continue** dialog box:
   a. To save this manifest as a new manifest template:
      i. The **Save as New** radio button is selected by default.
      ii. In the **Template Name** * field, type a *name for the manifest 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 save this manifest as an existing manifest 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 manifest template displays.

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

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

8. In the **Vehicles** step, complete any necessary edits and select the **Next** button.

9. In the **Review** step of the manifest template:
   a. Review all manifest template information and complete any necessary edits.
   b. Select the **Save** button.

CREATE A MANIFEST FROM A MANIFEST 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 **Manifest**.

3. In the **Manifest** menu, select **Create from Template**.
   The **Select Manifest Template** dialog box displays.

4. In the **Template** field:
   a. Type the *name of the desired manifest template* and the drop-down menu of manifest templates displays.
   b. Select the manifest template from the list.

5. Select the **Continue** button.
   The **Create Manifest** landing page displays.

6. In the **Create Manifest** 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 **Crew** step displays. The crewmembers from the template are selected and highlighted.

8. In the **Crew** section:
   a. If necessary, select the checkbox of the template crewmember(s) to deselect and remove the current driver(s) to allow changing the crewmember(s) to a different driver(s).
   b. If appropriate, the **Create** button can be used to add a new driver.
   c. If necessary, in the **US Destination Address** section, update the address information.

9. Select the **Next** button.
   The **Vehicles** step displays. The conveyance and equipment from the template are selected and highlighted.

10. In the **Vehicles** section:
    a. If necessary, select the checkbox of the template vehicle(s) to deselect and remove the current conveyance(s) and/or equipment to allow changing the vehicle(s) to a different conveyance(s) and/or equipment.
    b. If appropriate, the **Create** button can be used to add a new conveyance or equipment.
    c. If appropriate, select the **Edit** icon 🖉 of the conveyance or equipment to review the **License Plates**, **Insurance**, and **Seal** section information.

11. Select the **Next** button.
    The **Bill of Lading** step displays.

12. In the **Bill of Lading** section:
    a. For an existing BOL, select the checkbox of the BOL to add to the manifest.
    b. If appropriate, the **Create** button can be used to add a new BOL or create the BOL from a BOL template.

13. Select the **Next** button.
   The **Review** step displays.

14. In the **Review** step:

    a. Review all manifest information and complete any necessary edits.

    b. To save the manifest and submit it to CBP, select the **Submit to CBP** button.

   c. To save a draft of the manifest, select the **Close** button.

PROCESS MANIFEST TEMPLATES IN ACCOUNT TAB

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

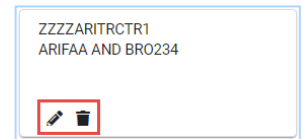2. On the left, select the **Manifest Templates** subtab.

   The manifest templates currently associated with the carrier account display.
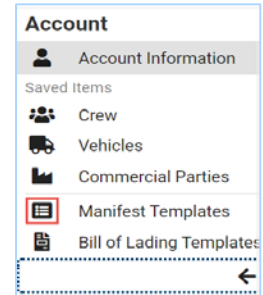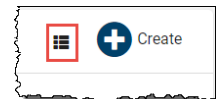

3. To locate a specific manifest template(s), select the **Search Saved Manifest Templates** field and type a *partial or complete template name or description*.
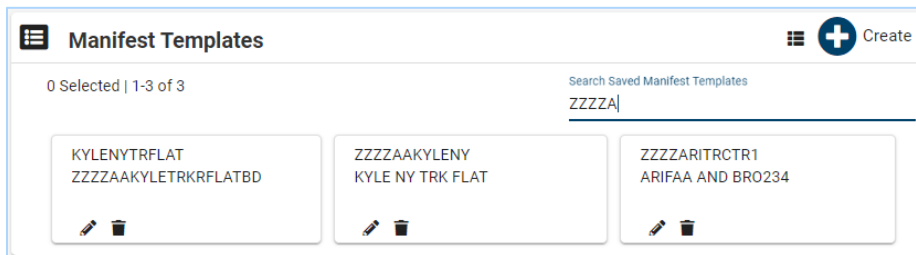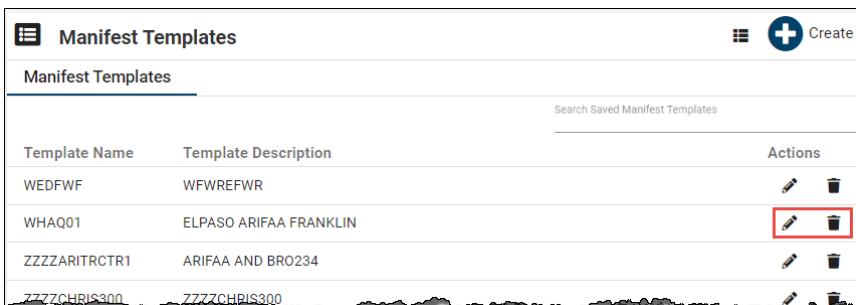

4. In a **Manifest Template** card:

    a. Select the **Edit** icon ✏ to edit the manifest template.

    b. Select the **Delete** icon 🗑 to delete the manifest template.

5. In the upper right, 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 manifest template.

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