



## ACE PORTAL SET UP HOW TO FOR CLIENTS

Prior to applying for an ACE Portal account Importers need to verify internally within their company if an ACE portal account is already established for their company or not. If not able to verify internally we suggest completing the application process below and if an account is already established US Customs will advise an account is on file.

If an account is already set up the importer will need to decide internally if a change needs to be made to the individual who is listed as the Trade Account Owner. If a change is needed, please contact ACE Support for instructions as well as the JASUSA branch as a 5106 will need to be filed updating the contact's name in CBPs system.

To ensure the information on your application matches what is on file in CBPs system the importer is recommended to contact the JASUSA branch requesting for a copy of the customs query to verify the information on file in CBPs system.

Once verification is received the importer will go to [Applying for an ACE Secure Data Portal Account | U.S. Customs and Border Protection](#)

And select Importers: apply here

### Applying for an Account

- **Step 1: Identify Sub-account Type**

Determine which Sub-Account Type your company will need based on your business activity. See Sub-Account Types section of our [Introduction to an ACE Secure Data Portal Account](#) page for details.

- **Step 2: Designate an Account Owner**

Select an individual, or entity, who will serve as the manager of your corporate account.

*Please note: Account Owners are not required to be the owner of the company.*

- **Step 3: Apply**

Complete applicable application method below:

- [Protest Filers: Apply here \(How to Apply for an ACE Protest Filer Account Form video\)](#)

- [Exporters: Apply here \(How to Apply for an ACE Export Account video\)](#)

- [Importers: Apply here](#)

- [Automated ACE Portal Account Application for Importers guide](#)

- This application is ONLY for trade parties with an existing CBP Form 5106 (5106 record) on file with CBP and without existing ACE Portal account access



The individual will be directed to the application. The individual who will be the Trade Account Owner will complete the following fields:

Company Name – must be in ALL CAPS

Importer of Record Number:

1. If a corporation the format is NN-NNNNNNNNNN
2. If Sole Proprietor or Individual the format is NNN-NN-NNNN
3. If this is a foreign company with a custom assigned number the format is YYDDPP-NNNNN

Business email address – this is the individuals company email address that is going to be the Trade Account Owner



U.S. Customs and Border Protection

Application for an ACE Portal Top Account with the Importer Sub-Account View

Attention:

This application form enables trade parties to request the creation of an ACE Portal top account with access to a single Importer (CBP Form 5106) record sub-account view. Successful completion of this form will result in the creation of a top account, the assignment of an account owner, and the association of an entity's 5106 record to the new top account.

*This application is ONLY for trade parties that meet the following criteria:*

- Has an existing Importer (5106) record on file with CBP
- There is no existing Trade ACE Portal account access to the importer (5106) record
- Designated Trade Account Owner (identified by the email provided in Business Email Address field) cannot already have ACE Portal access

**IMPORTANT:**

*As part of this application, CBP will send a system-generated verification code to the existing point of contact email address on file with CBP in the Importer (5106) record. If appropriate, coordinate with a broker to confirm and/or update the point of contact email address. Prior to completing and submitting this form, CBP advises applicants to coordinate with the point of contact listed on the applicable Importer (5106) record to ensure timely access to the system-generated verification code.*

Instructions:

Detailed instructions are provided in the user guide posted here: [Automated ACE Portal Account Application for Importers](#)

- Enter the required information in the fields below and click **Next**.
- CBP will send a system-generated verification code to the POC email address that is on file in the Importer (5106) record. The verification code will be valid for 10 minutes.
- Enter the system-generated code that is sent to the POC email address that is on file in the Importer (5106) record to proceed with the application request.

Quick tips for successful completion for the fields below:

- The Business Email Address provided may not be tied to an existing ACE portal account owner or user.
- The Business Email Address can be different from the POC email address that is on file in the Importer (5106) record.
- The Importer of Record Number (IR#) provided must match an on file Importer (5106) record which has a valid POC email address.
- The Company Name provided must match the company name in the Importer (5106) record.

\* Company Name

\* Importer of Record Number (IR#)

\* Business Email Address (Account Owner Login Email)



Once the fields are completed select next

\*Company Name

\*Business Email Address (Account Owner Login Email)

\*Importer of Record Number (IRN)  
NN-NNNNNNR00X or NNN-NN-NNNN or YYDDPP-NNNNN

Primary - Home

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If no warnings are received an email will be sent to the email address entered on the application. The email will obtain a verification code, this code is to be entered in order to proceed to the next page.

In the next screen the individual will complete the rest of the application and submit the application.

Application for an ACE Portal Top Account with the Importer Sub-account View

Company Name  
Test Importer Account

Importer Record Number (IRN)  
25

\*Company Organizational Structure  
Select an Option

Account's Fiscal Year End Date

DUNSA  
XX-XXX-XXXX

Company Website  
https://

Following information is required for Account Owner

Business Email Address (Account Owner Login Email)  
@

\*Account Owner First Name

Account Owner Middle Name

\*Account Owner Last Name

\*Country  
Select an Option

\*Street Address

\*City

State

\*Zip Code

\*Telephone Number

The following link provides detailed step by steps instructions on completing the application [Automated ACE Portal Account Application](#)

CBP will complete the application and will send an email to the Trade Account Owner when the company's portal is set up. Once the ACE account is set up proceed with setting up for electronic refunds.

PEOPLE  
MAKE THE  
DIFFERENCE