

ACE Portal

User Management

October 2025

U.S. Customs and Border Protection

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TOPIC 1: ADD A NEW USER AND ACCESS PERMISSIONS

INTRODUCTION

The ACE Portal provides the ability to add multiple trade user types and their user permissions.

The available trade user types and actions include:

- Trade Account Owner (TAO), added by CBP
  - Add and maintain proxy trade account owners and account users
  - Assign access permissions to the user
  - Assign cross account access

    Reference the Cross Account Access QRG for details
- Proxy Trade Account Owner (PTAO)
  - Add and maintain account users
  - Assign access permissions to the user
- Account User
  - Manage account information based on access

If the TAO or PTAO is assigned to more than one top account, the appropriate top account must be selected prior to adding the new user.

Once a user is added, the TAO or PTAO assigns user permissions.

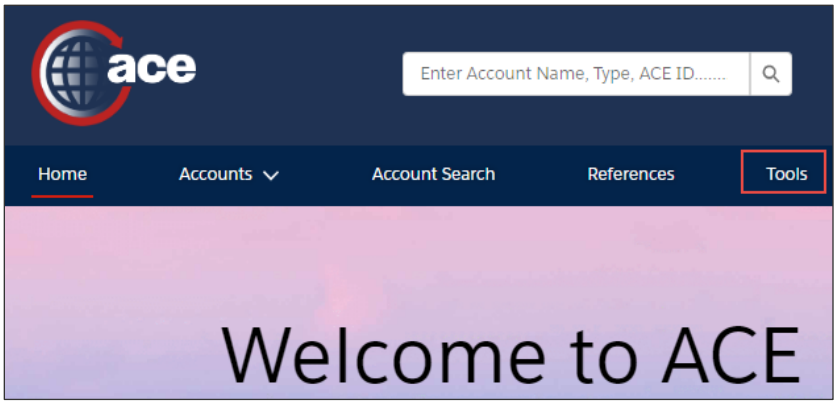
Permissions can be assigned to the top account, to all subaccount types under the top account, or to each specific subaccount.

The available permissions include:

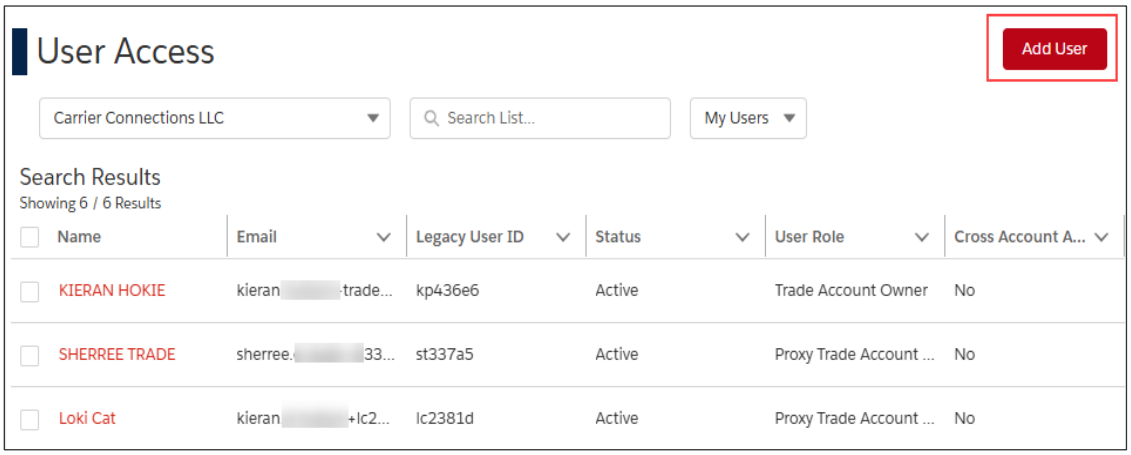
- Access to Top Account
  - Grants or denies user access to the top account
- Full Access to All Subaccount Types
  - Grants the user full access to all subaccount types
- Read-Only Access to All Subaccount Types
  - Allows the user to view, but not modify, the subaccounts for all subaccount types
- No Access to all Tabs for Each Subaccount Type
  - Denies access to all tabs for each subaccount type selected
- Read-Only Access to all Tabs for Each Subaccount Type
  - Allows the user to view, but not modify, the information in all tabs for each subaccount type selected
- Full Access to all Tabs for Each Subaccount Type
  - Grants the user full access to all tabs for each subaccount type selected
- Access to the Tabs for each Subaccount Type
  - For each subaccount type, grants the level of access (No, Read-Only, or Full) to each tab
- Access to Subaccounts
  - For each account identifier(s) of each subaccount type (i.e. filer codes, EINs, IR numbers), grants or denies access

ADD A NEW USER

1. In the **Welcome to ACE** home page, select the **Tools** tab.



The **User Access** pane displays.

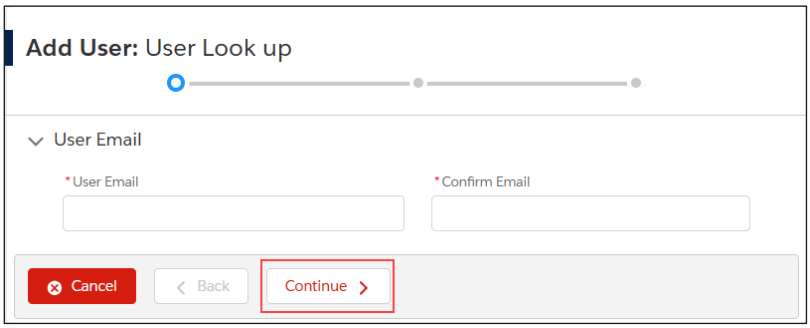


NOTE: The **Search Results** list displays all users assigned to the top account (Carrier Connections LLC) related to the user logged in (TAO or PTAO).

IMPORTANT: If the TAO or PTAO is assigned to more than one top account, use the first field drop-down menu at the top, left (top account name) to select the appropriate top account to add the new user.

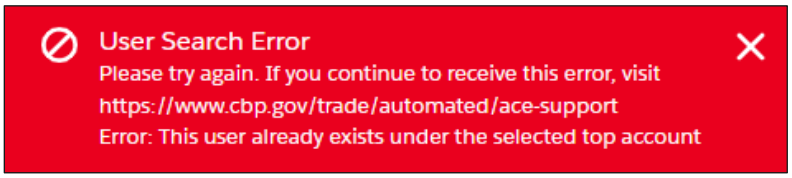
2. Select the **Add User** button.

The **Add User: User Look up** pane displays.

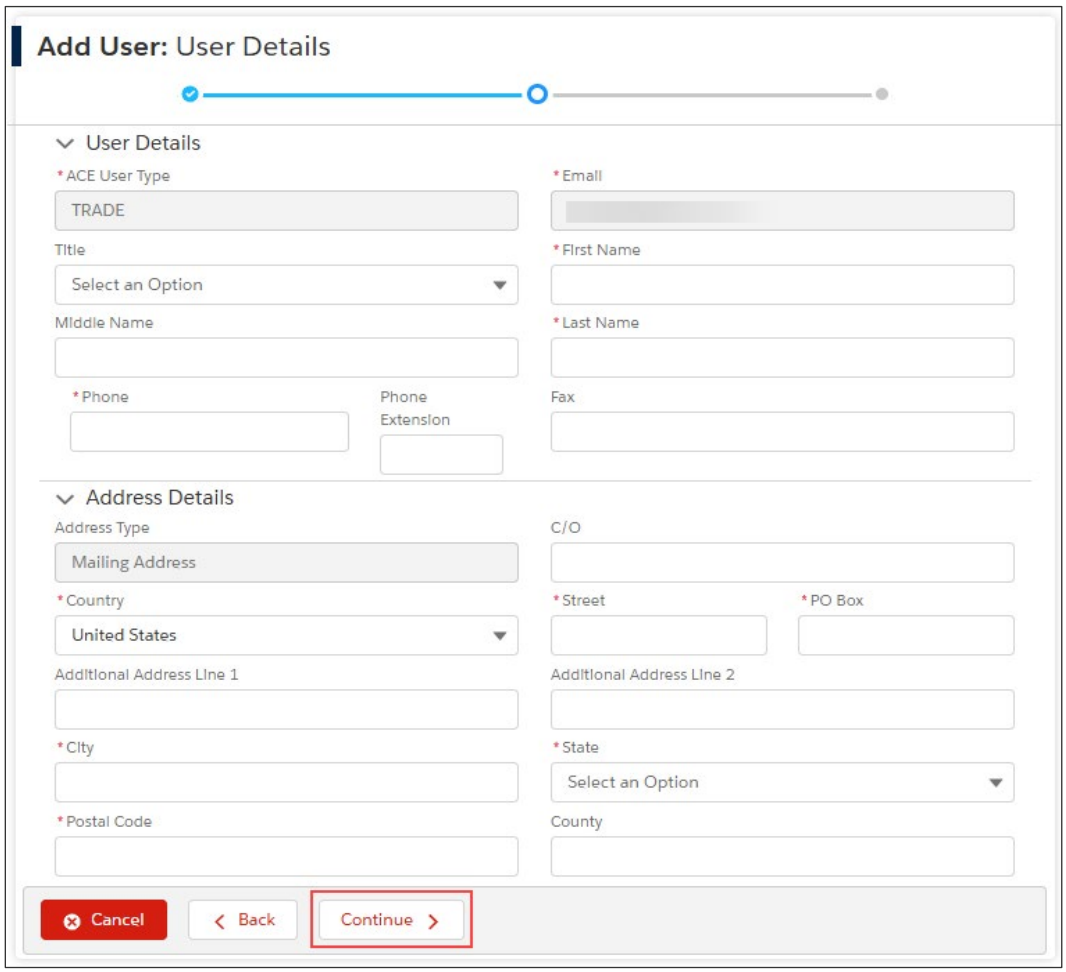


3. In the **User Email** section:
   a. In the ***User Email** field, type the *email address of the new user*.
   b. In the ***Confirm Email** field, again type the *email address of the new user.*
   c. Select the **Continue >** button.

NOTE: The **Error: This user already exists under the selected top account** message displays if the new user email is already associated with the top account.



The **Add User: User Details** pane displays.



NOTE: The ***ACE User Type**, ***Email**, and ***Address Type** fields are prepopulated and not editable. If all fields are grayed out and not editable, this indicates that the user already exists but is assigned to a different top account. Reference Topic 2: Add an Existing User for details.

4. In the **User Details** section:
   a. In the ***First Name** field, type the *first name of the new user*.
   b. In the ***Last Name** field, type the *last name of the new user*.
   c. In the ***Phone** field, type the *phone number of the new user*.

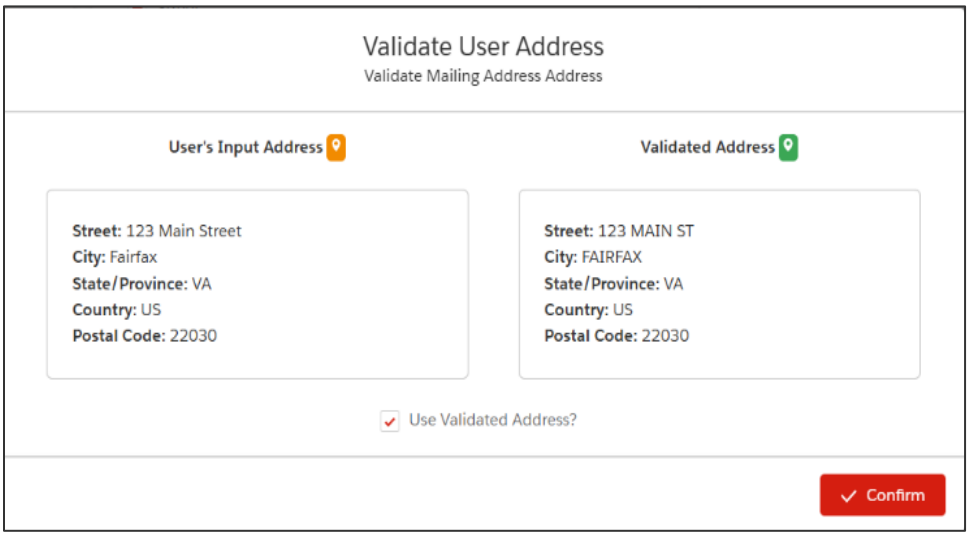
   NOTE: Include a dash (–) to separate the parts of the phone number.

   d. Complete other fields, as appropriate.
5. In the **Address Details** section:
   a. If appropriate, in the ***Country** drop-down menu, select the country.
   b. In the ***Street** field, type the *street address of the new user*.

   OR`

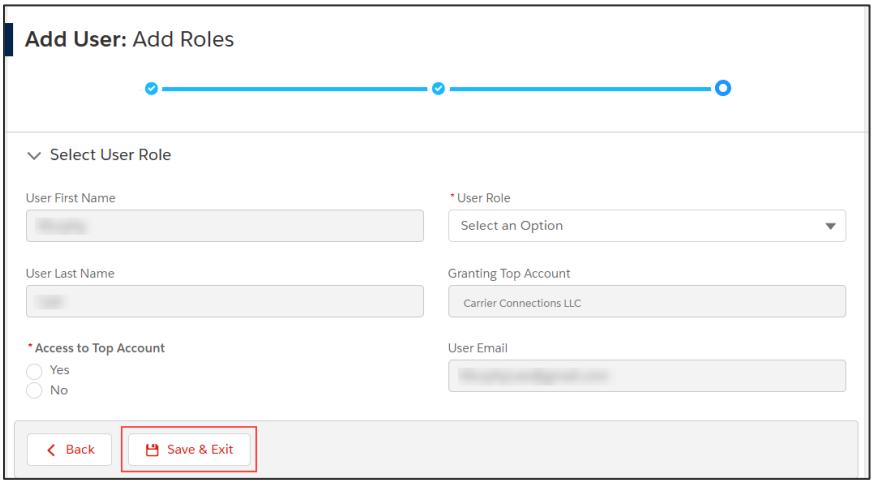
   c. In the ***PO Box** field, type the *PO Box number of the new user*.
   d. In the ***City** field, type the *city of the new user*.
   e. In the ***State** drop-down menu, select the state.
   f. In the ***Postal Code** field, type the *postal code of the new user*.
   g. Complete other fields, as appropriate.
6. Select the **Continue >** button.

   The **Validate User Address** dialog box displays.

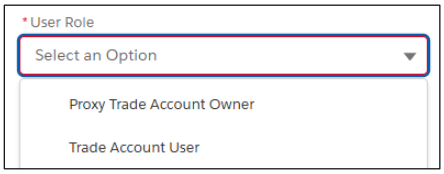


7. Select the ✓**Confirm** button.

   The **Add User: Add Roles** pane displays.



8. In the **Select User Role** section:
   a. In the ***User Role** drop-down menu, select a user role option.

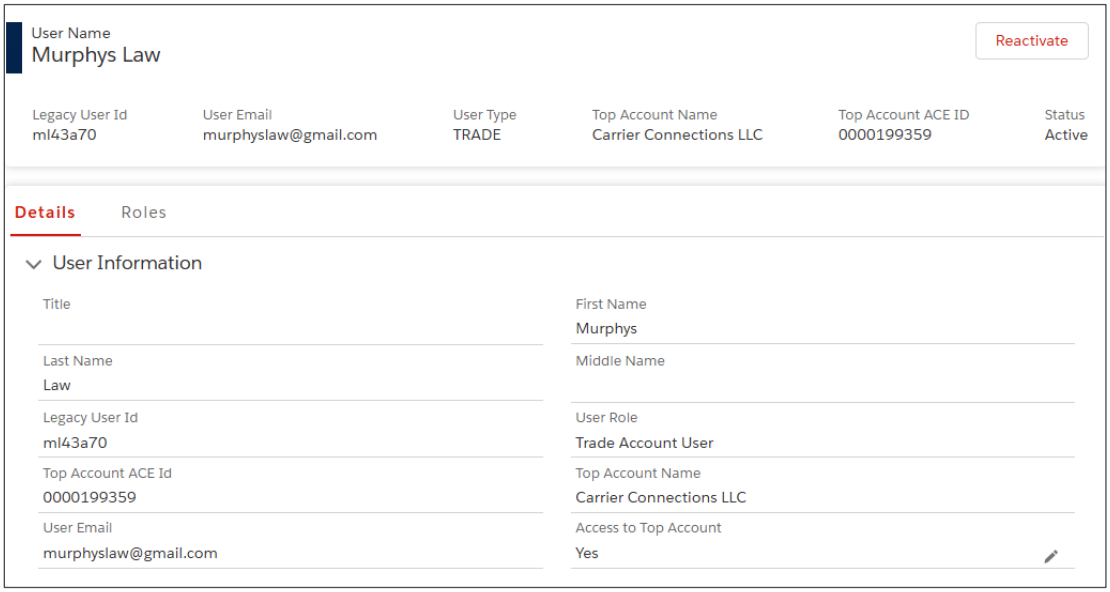


   b. For ***Access to Top Account**:
      i. Retain the default **Yes** to provide access to the top account.

      OR

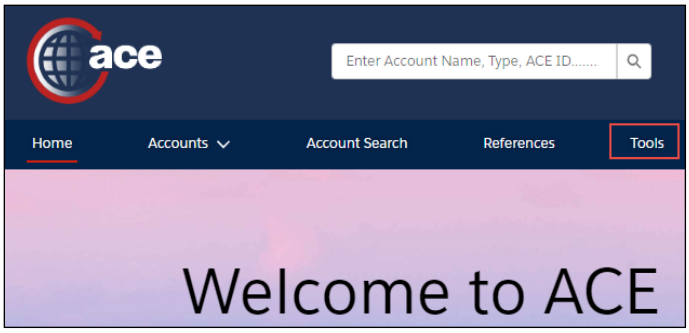
      ii. Select the **No** radio button to deny access to the top account.
   c. Select the **Save & Exit** button.

      The **User Name** pane displays the new user information.

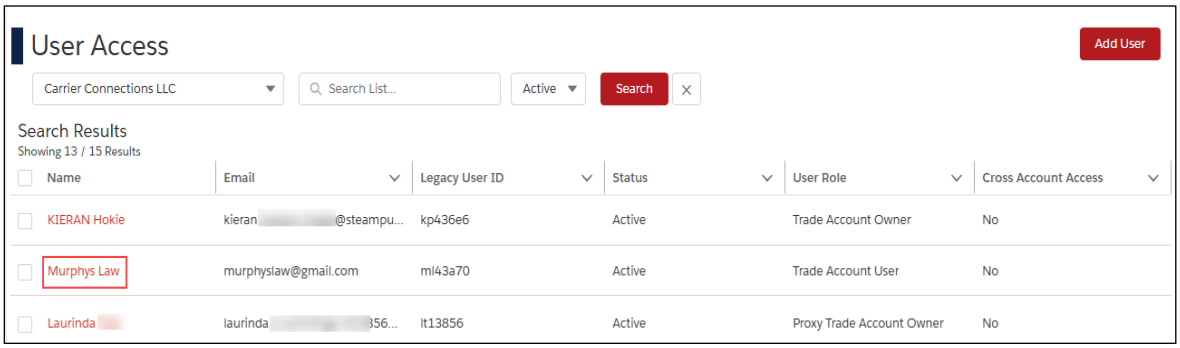


ADD USER PERMISSIONS

1. In the **Welcome to ACE** home page, select the **Tools** tab.

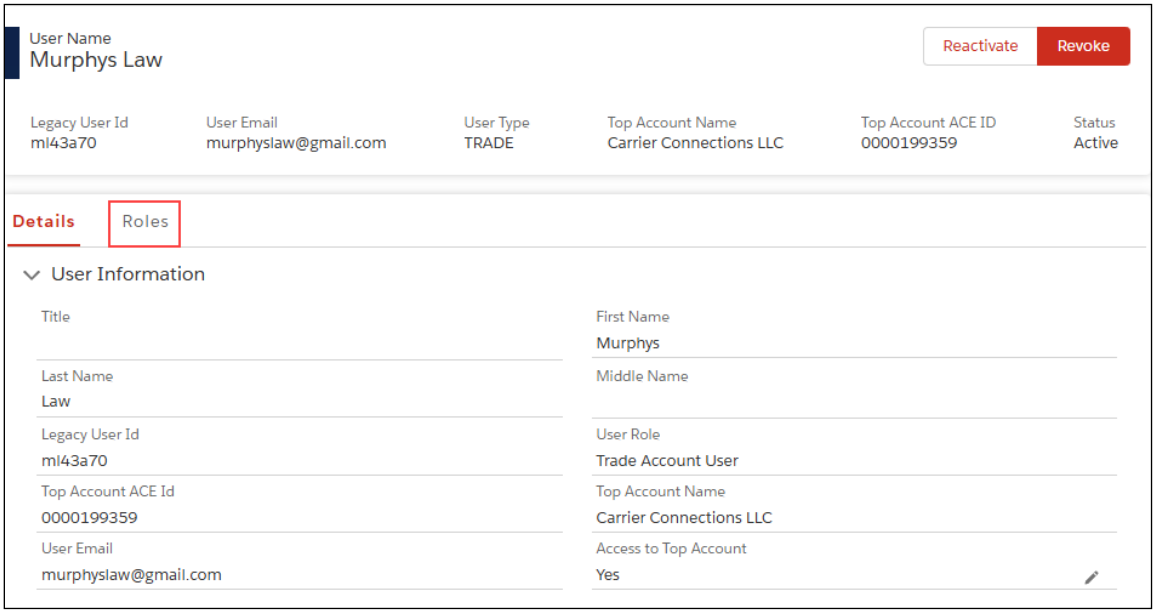


The **User Access** pane displays.

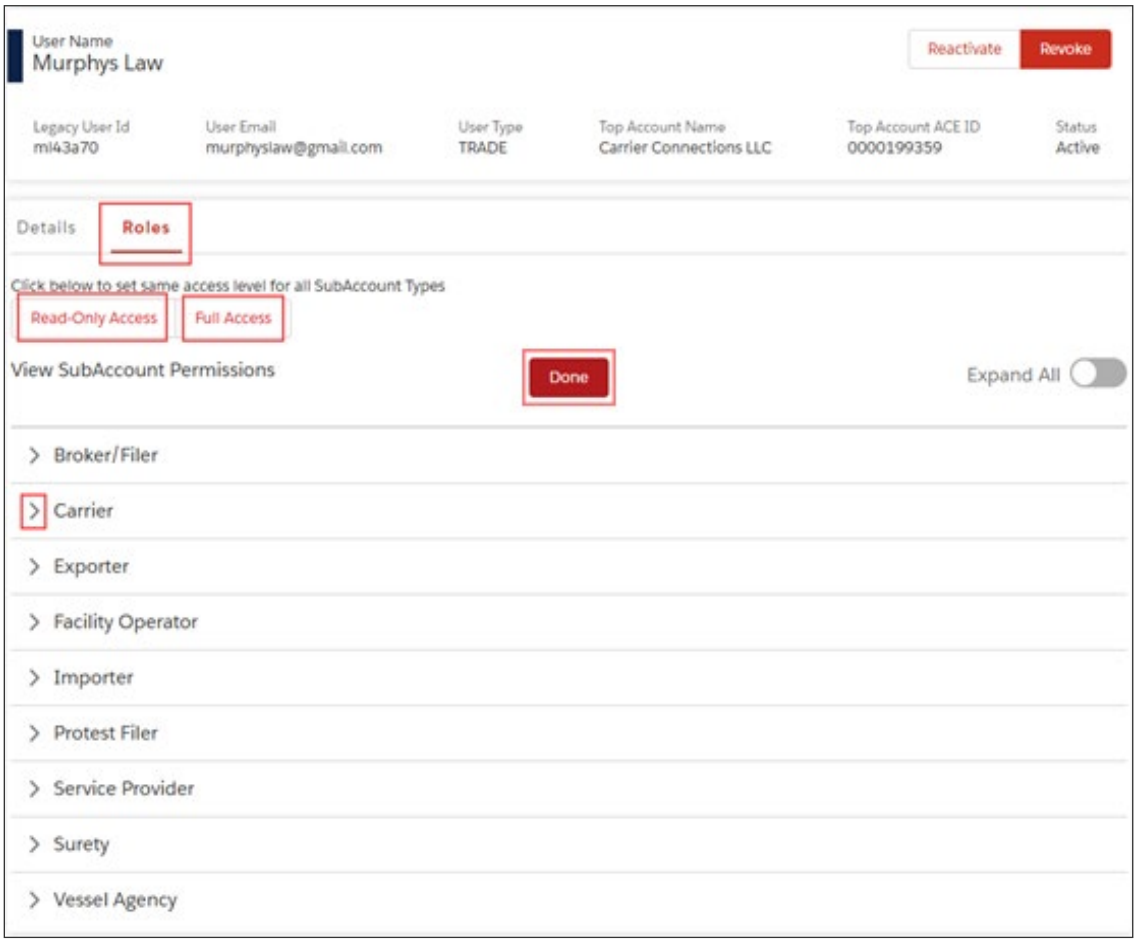


2. In the **Name** column, select the user hyperlink.

   The **User Name** pane displays.



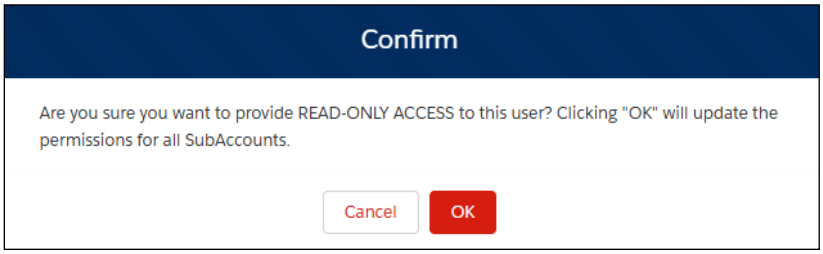
3. Select the **Roles** tab.



a. To assign **Read-Only Access** to all subaccount types:

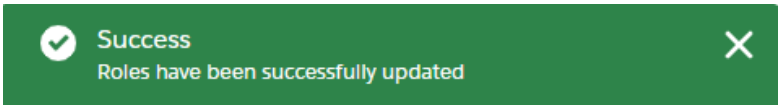
   i. Select the **Read-Only Access** button at the top.

   The **Confirm** dialog box displays.



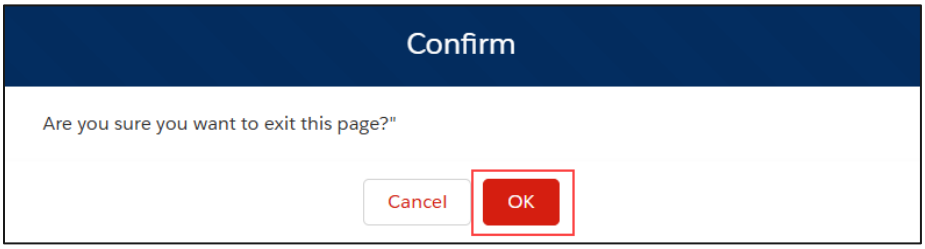
   ii. Select the **OK** button.

   The **Roles have been successfully updated** message displays.



   iii. Select the **Done** button.

   The **Confirm** dialog box displays.



iv. Select the **OK** button.

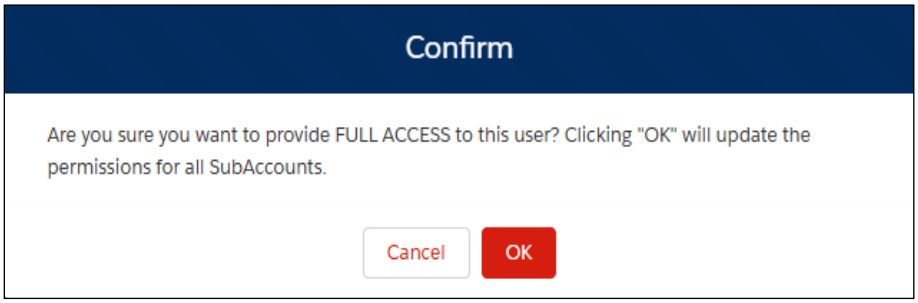
The **User Access** pane displays.

OR

b. To assign **Full Access** to all subaccount types:

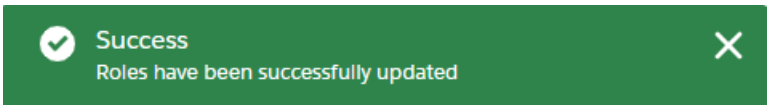
i. Select the **Full Access** button at the top.

The **Confirm** dialog box displays.



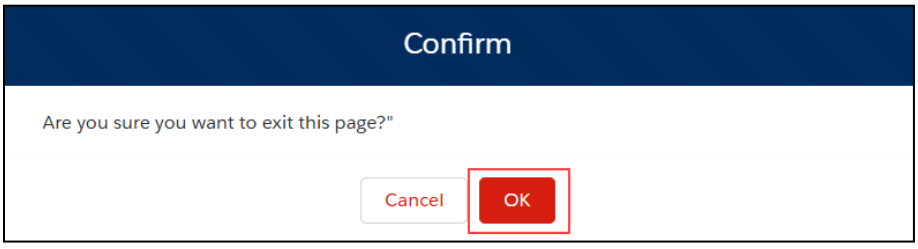
ii. Select the **OK** button.

The **Roles have been successfully updated** message displays.



iii. Select the **Done** button.

The **Confirm** dialog box displays.



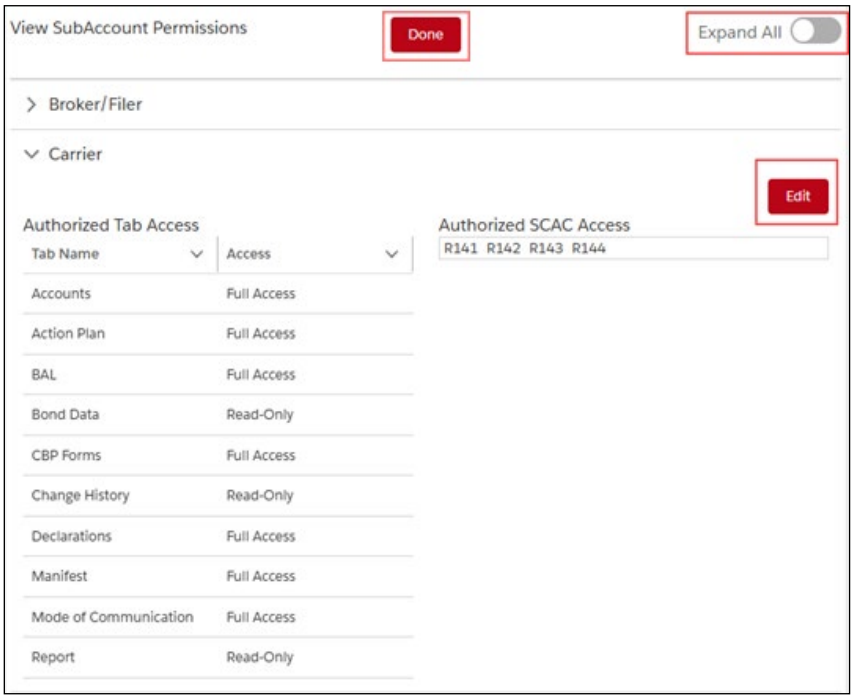
iv. Select the **OK** button.

The **User Access** pane displays.

OR

c. To assign access permissions and/or restrictions to a specific subaccount type(s):

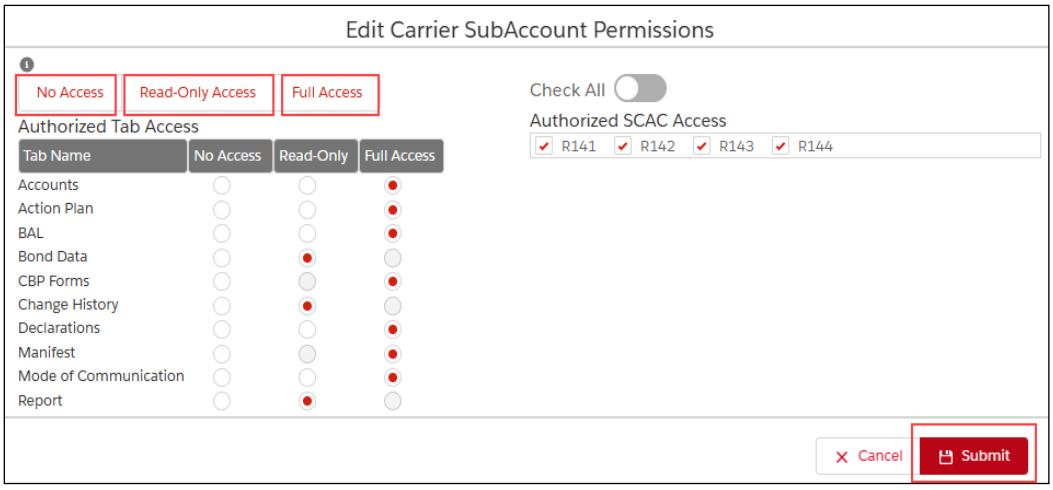
i. Select the **Expand** icon > to expand the specific subaccount type access details.



NOTE: Select the **Expand All** toggle button at the top to expand the details of all the subaccount types at one time. Select the **Expand All** toggle button again to collapse all the subaccount type details.

ii. Select the **Edit** button.

The **Edit <subaccount type> SubAccount Permissions** pane displays.



NOTE: The user access radio buttons for the tabs of the subaccount type are prepopulated by default based on the subaccount type and any preassigned permissions.

d. To assign user access for all tabs of the specific subaccount type:

i. Select the **No Access** button, **Read-Only Access** button, or **Full Access** button at the top to assign user access for all the tabs of the subaccount type.

NOTE: The populated user access radio buttons for the tabs of the subaccount type dynamically change based on the Access button selected at the top.

OR

ii. Select the **No Access**, **Read-Only**, or **Full Access** radio button to assign the appropriate user access for each tab of the subaccount type.

e. To assign user access to specific accounts of the subaccount type:

i. On the right, to deny access to the account indicated by the account identifier, deselect the check box to the left of the specific account identifier.

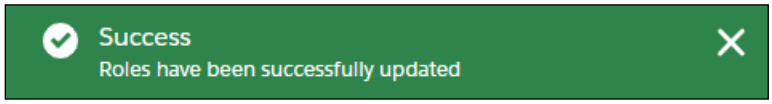
OR

ii. On the right, to assign access to all accounts of the account type, select the **Check All** toggle button to check all the checkboxes and assign access to all the account identifiers.

NOTE: Select the **Check All** toggle button again to uncheck the check boxes of all the account identifiers and deny access to all accounts of the account type.

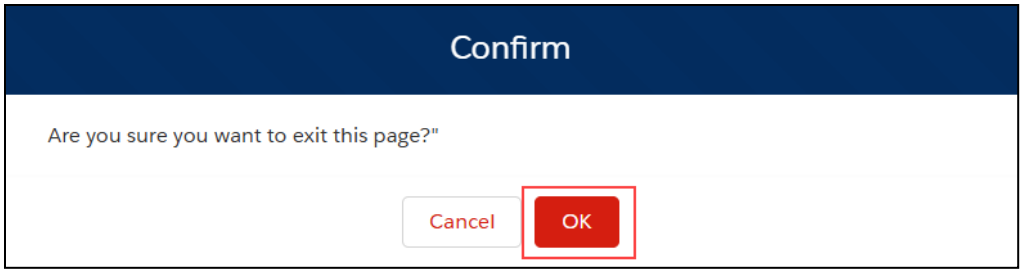
f. Select the **Submit** button.

The **Roles have been successfully updated** message displays.



g. Select the **Done** button.

The **Confirm** dialog box displays.



h. Select the **OK** button.

The **User Access** pane displays.

Topic 2: Add an Existing User

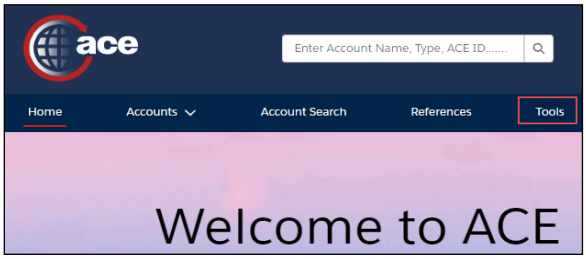
Introduction

TAOs and PTAOs with proper permissions can add an existing user of a different top account to their top account. The email of the existing user is referenced to add that user.

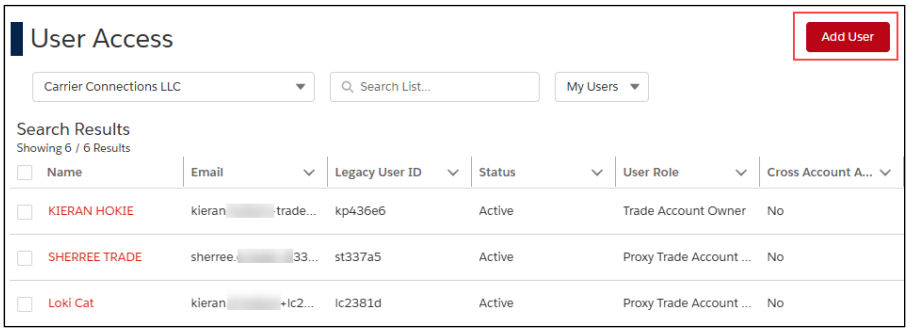
IMPORTANT: If the TAO or PTAO is assigned to more than one top account, the appropriate top account must be selected prior to adding the existing user.

Add an Existing User

1. In the **Welcome to ACE** home page, select the **Tools** tab.



The **User Access** pane displays.

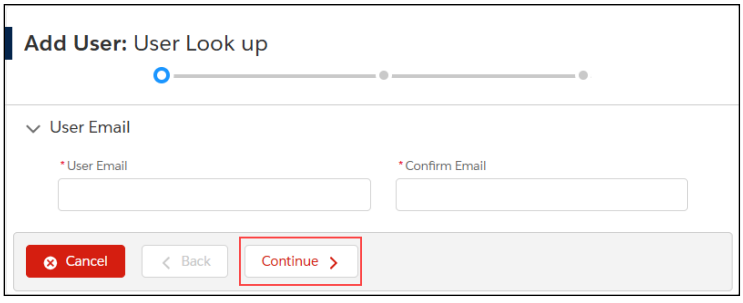


NOTE: The **Search Results** list displays all users assigned to the top account (Carrier Connections LLC) related to the user logged in (TAO or PTAO).

IMPORTANT: If the TAO or PTAO is assigned to more than one top account, use the first field drop-down menu at the top, left (top account name) to select the appropriate top account to add the existing user.

2. Select the **Add User** button.

The **Add User: User Look up** pane displays.

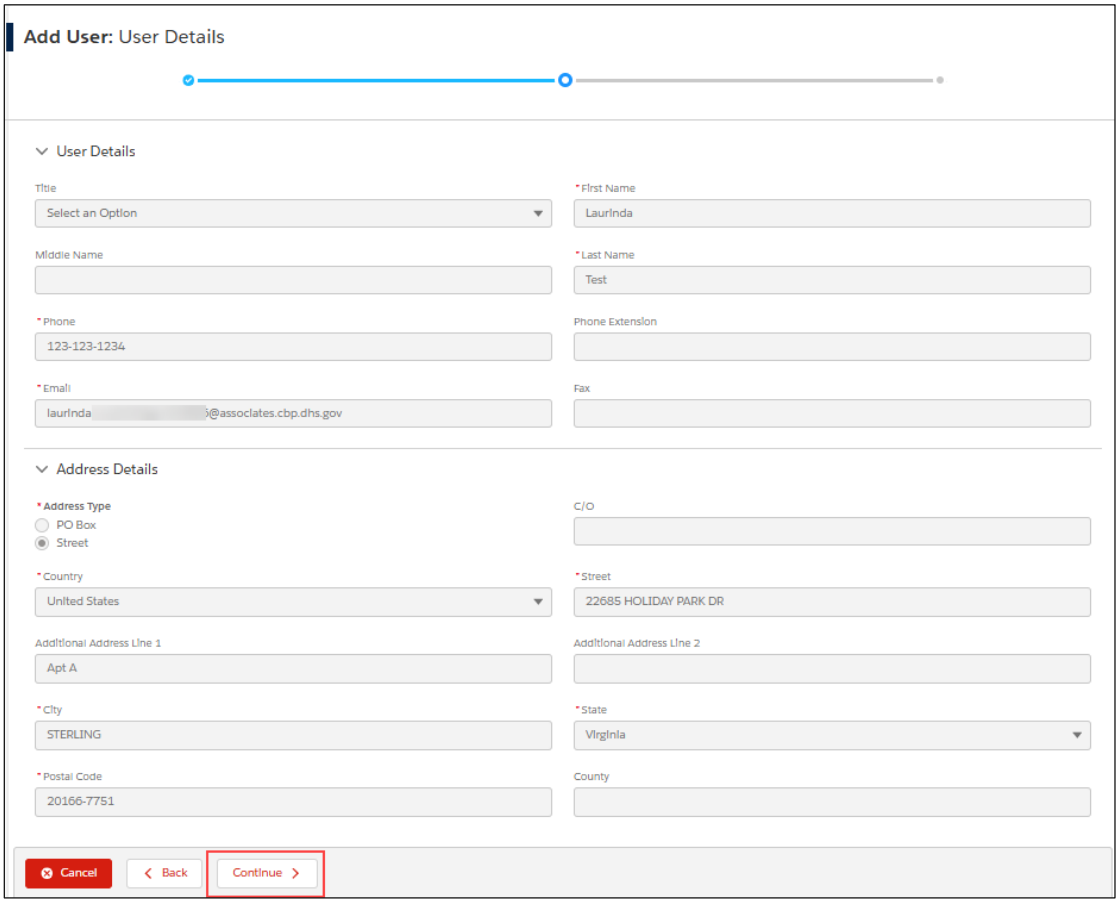


3. In the **User Email** section:
   a. In the ***User Email** field, type the *email address of the existing user*.
   b. In the ***Confirm Email** field, again type the *email address of the existing user.*
   c. Select the **Continue >** button.

NOTE: The **Error: This user already exists under the selected top account** message displays if the existing user email is already associated with the top account.



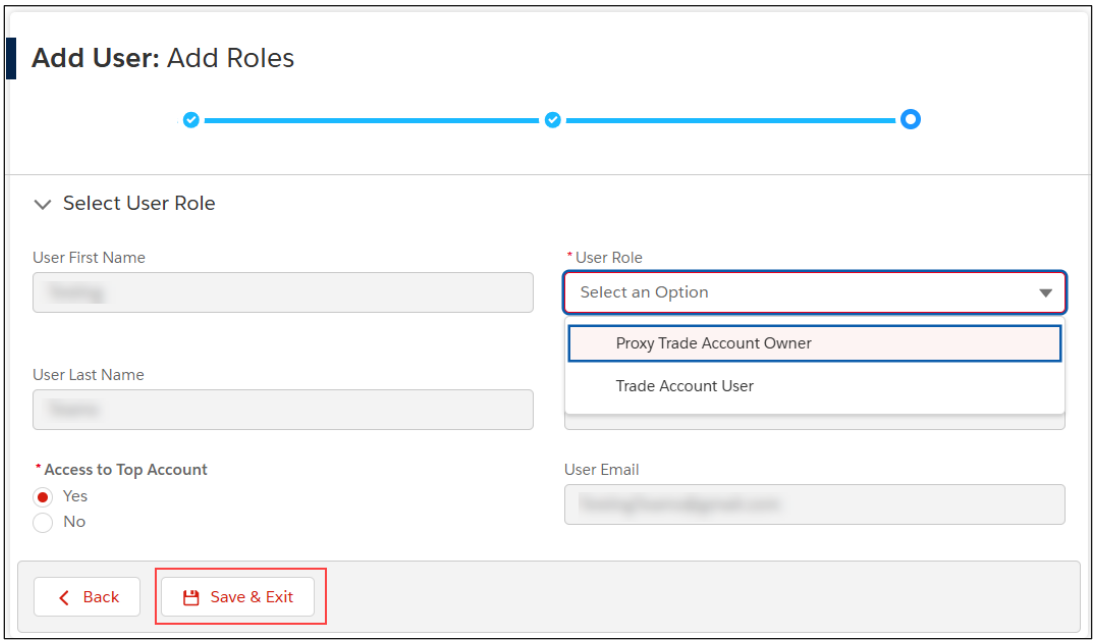
The **Add User: User Details** pane displays the user information of the existing user.



NOTE: The **User Details** and **Address Details** fields are prepopulated for the existing user and not editable.

4. Select the **Continue >** button.

   The **Add User: Add Roles** pane displays.

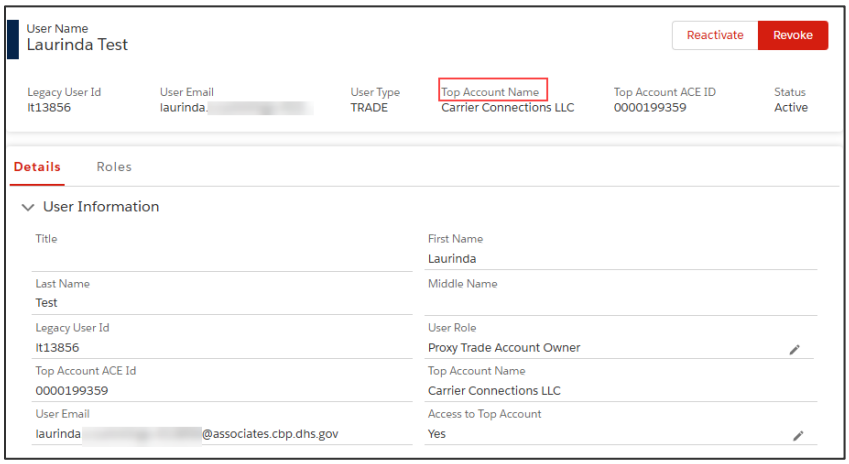


5. In the **Select User Role** section:
   a. In the ***User Role** drop-down menu, select a user role option.
   b. For ***Access to Top Account**:
      i. Select the **Yes** radio button to grant access to the top account.

      OR

      ii. Select the **No** radio button to deny access to the top account.
   c. Select the **Save & Exit** button.

      The **User Name** pane of the added existing user displays.



NOTE: The **Top Account Name** field at the top displays the top account to which the existing user was added.

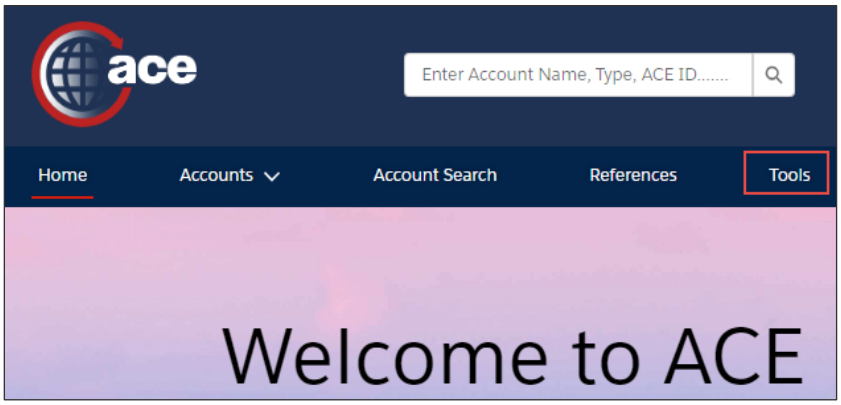
Topic 3: Search, View, and Edit the User Details and Permissions

Introduction

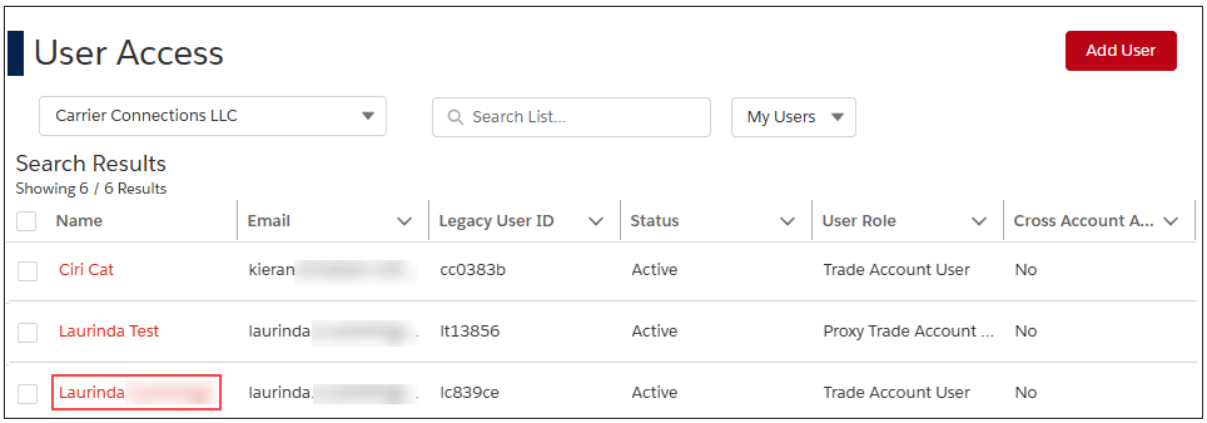
Use the **Search** feature to locate users and then view and edit user details and permissions.

Search for a User

1. In the **Welcome to ACE** home page, select the **Tools** tab.



The **User Access** pane displays.



NOTE: The **Search Results** list displays all users assigned to the top account (Carrier Connections LLC) related to the user logged in (TAO or PTAO).

IMPORTANT: If the TAO or PTAO is assigned to more than one top account, use the first field drop-down menu at the top, left (top account name) to select the appropriate top account to search for the user.

2. If appropriate, in the **User Access** pane, in the **Search List…** field, type a *partial or complete user name to narrow the search results or locate a specific user in the indicated top account.*

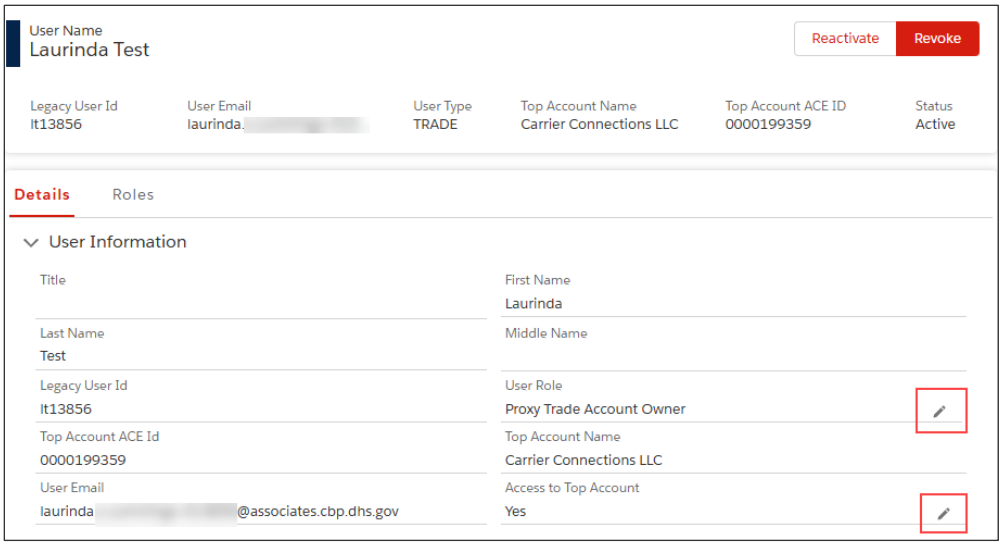
   The **Search Results** display.

3. In the **Search Results** list, in the **Name** column, select the user hyperlink.

   The **User Name** pane displays.

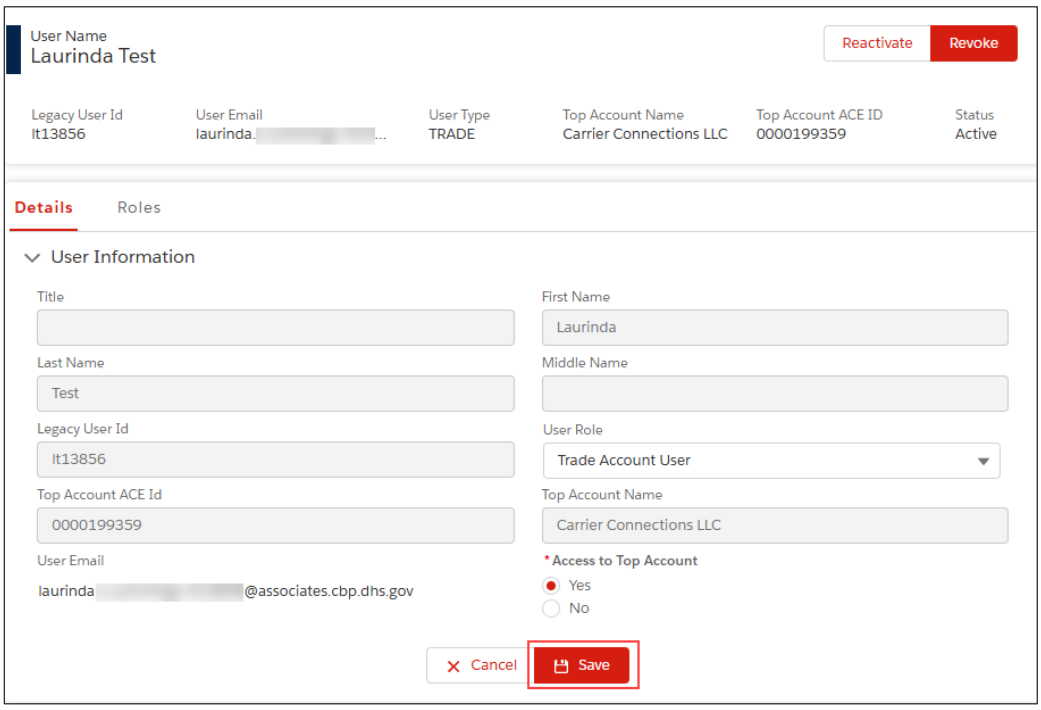
VIEW AND EDIT USER DETAILS

1. In the **User Name** pane, in the **Details** tab, select an **Edit** icon to edit the user details.



The edit pane displays.

2. In the **Details** tab, in the **User Information** section:

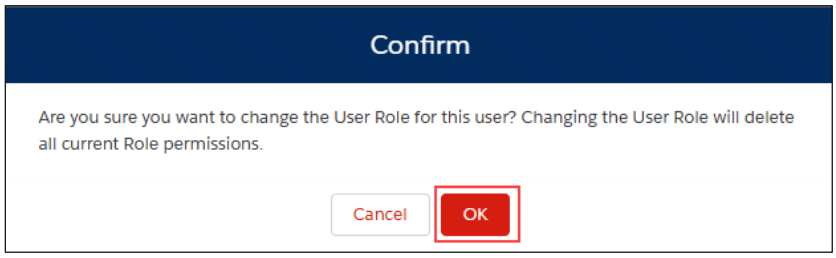


a. If appropriate, in the **User Role** drop-down menu, select the updated role.

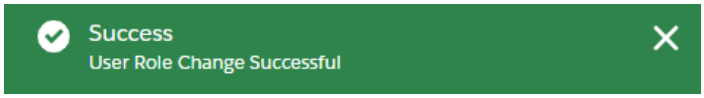
b. If appropriate, for ***Access to Top Account**, select the updated radio button.

c. If appropriate, select the **Save** button.

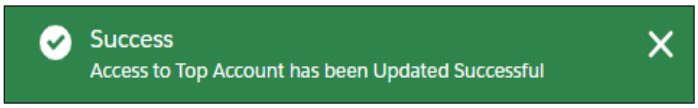
d. For an updated user role, in the **Confirm** dialog box, select the **OK** button.



The **User Role Change Successful** success message displays

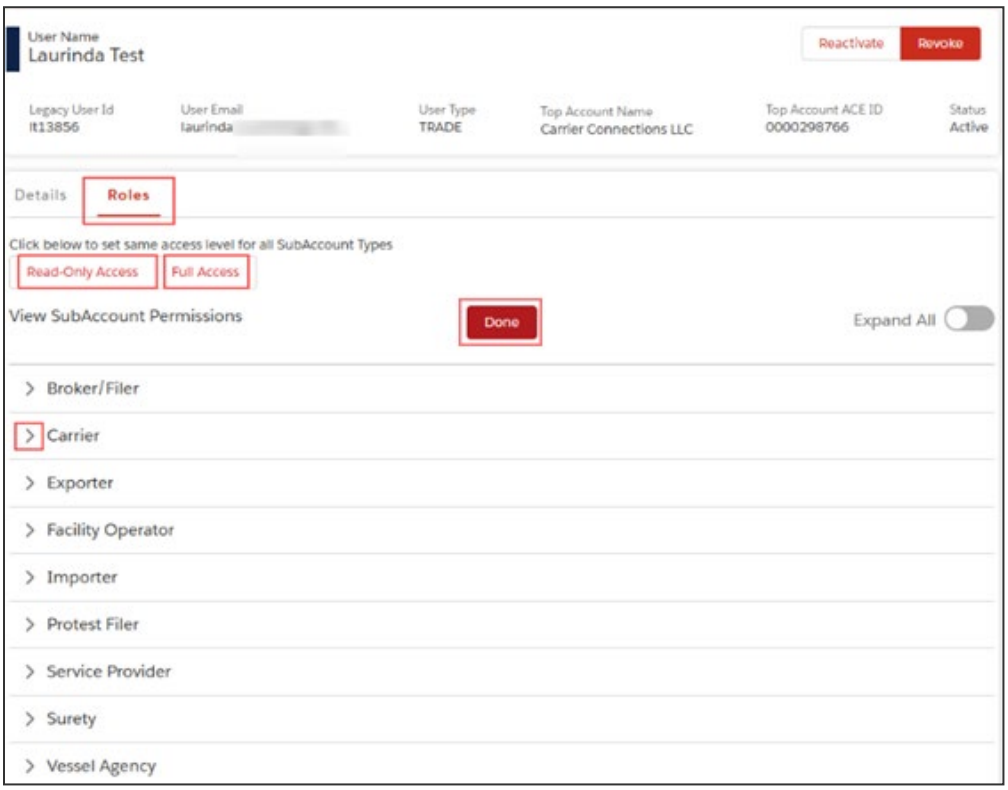


For an updated access to top account, the **Access to Top Account has been Updated Successful** message displays.



VIEW AND EDIT USER PERMISSIONS

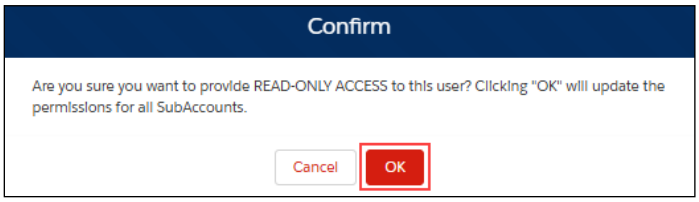
1. In the **User Name** pane, select the **Roles** tab.



   a. To modify access to all subaccounts to **Read-Only Access**:

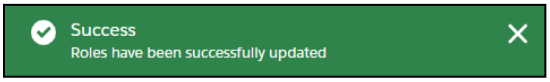
      i. Select the **Read-Only Access** button at the top.

      The **Confirm** dialog box displays.



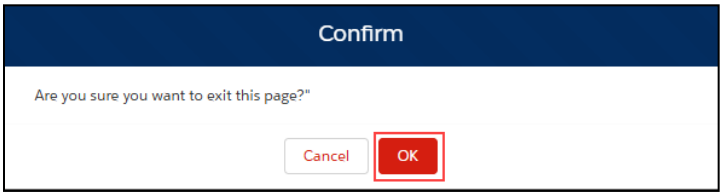
ii. Select the **OK** button.

The **Roles have been successfully updated** message displays.



iii. Select the **Done** button.

The **Confirm** dialog box displays.



iv. Select the **OK** button.

The **User Access** pane displays.

OR

b. To modify access to all subaccounts to **Full Access**:

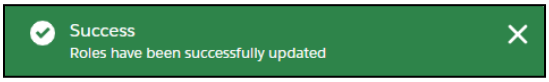
i. Select the **Full Access** button at the top.

The **Confirm** dialog box displays.



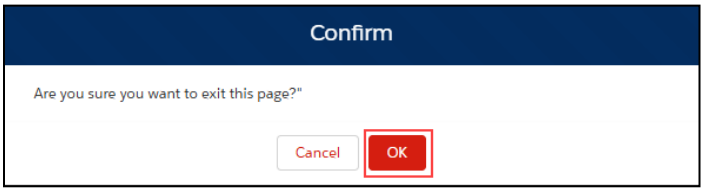
ii. Select the **OK** button.

The **Roles have been successfully updated** message displays.



iii. Select the **Done** button.

The **Confirm** dialog box displays.



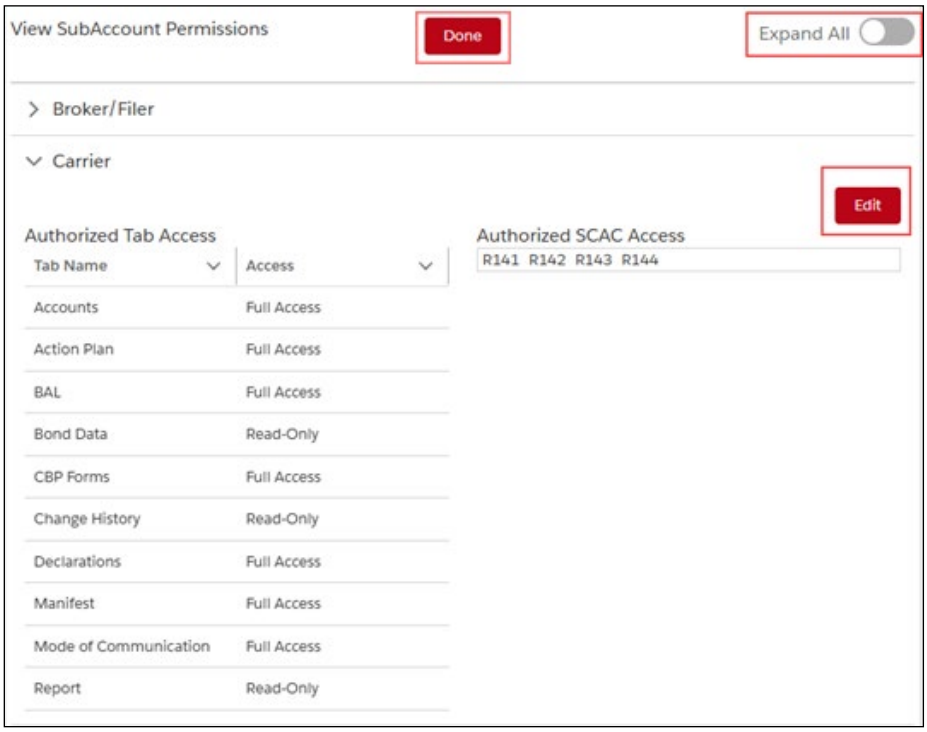
iv. Select the **OK** button.

The **User Access** pane displays.

OR

c. To modify access permissions and/or restrictions to a specific subaccount type(s):

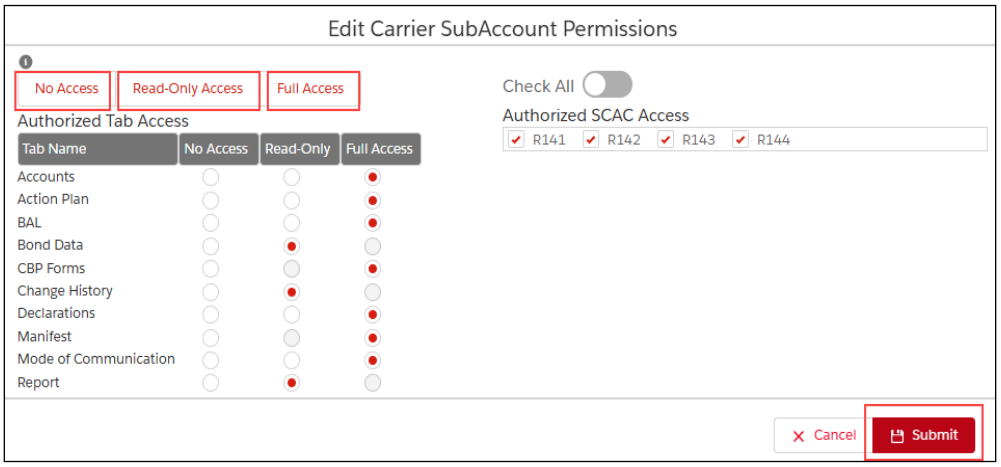
i. Select the **Expand** icon > to expand the specific subaccount type access details.



NOTE: Select the **Expand All** toggle button at the top to expand the details of all the subaccount types at one time. Select the **Expand All** toggle button again to collapse all the subaccount type details.

ii. Select the **Edit** button.

The **Edit <subaccount type> SubAccount Permissions** pane displays.



NOTE: The user access radio buttons for the tabs of the subaccount type are prepopulated by default based on the subaccount type and preassigned permissions.

d. To modify user access for the tabs of the specific subaccount type:

   i. Select the **No Access** button, **Read-Only Access** button, or **Full Access** button at the top to modify user access for all the tabs of the subaccount type.

   NOTE: The populated user access radio buttons for the tabs of the subaccount type dynamically change based on the Access button selected at the top.

   OR

   ii. Select the radio buttons to modify the appropriate user access for each tab of the subaccount type.

e. To modify user access for specific accounts of the subaccount type:

   i. On the right, to deny access to the account indicated by the account identifier, deselect the check box to the left of the specific account.

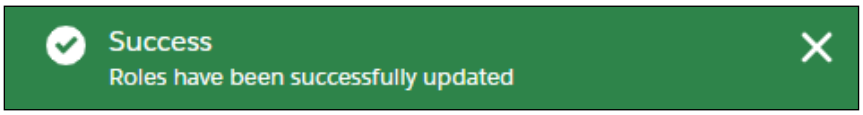
   OR

   ii. On the right, to assign access to all accounts of the account type, select the **Check All** toggle button to check all the checkboxes and assign access to all the account identifiers.

   NOTE: Select the **Check All** toggle button again to uncheck the check boxes of all the account identifiers and deny access to all accounts of the account type

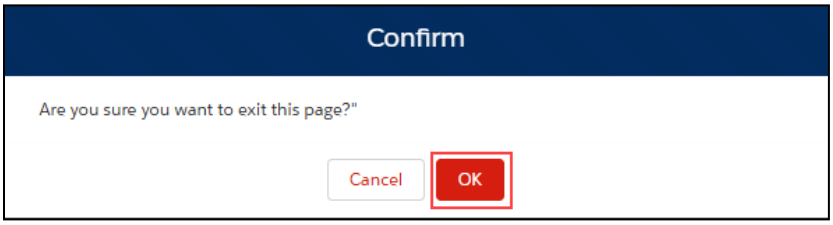
f. Select the **Submit** button.

   The **Roles have been successfully updated** message displays.



g. Select the **Done** button.

   The **Confirm** dialog box displays.



   h. Select the **OK** button.

      The **User Access** pane displays.

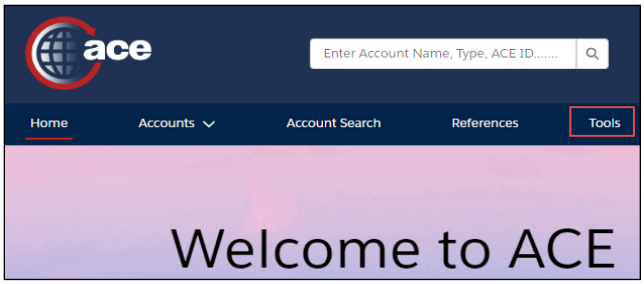
TOPIC 4: REACTIVATE AND REVOKE A USER

INTRODUCTION

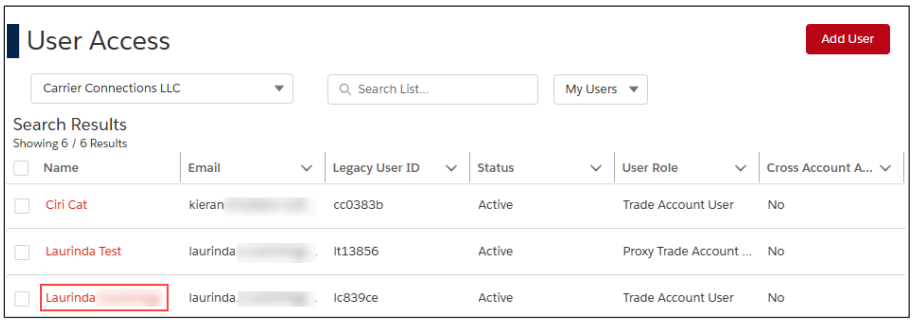
TAOs and PTAOs can reactivate and revoke users. Only a user with an inactive status can be reactivated. A user may have an inactive status due to 45 days of inactivity or a suspended user. Only active users can be revoked.

REACTIVATE A USER

1. In the **Welcome to ACE** home page, select the **Tools** tab.

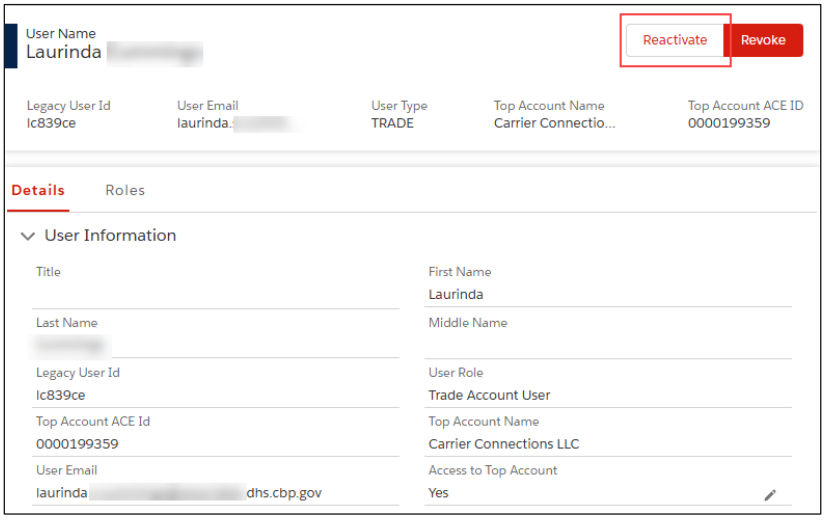


The **User Access** pane displays.



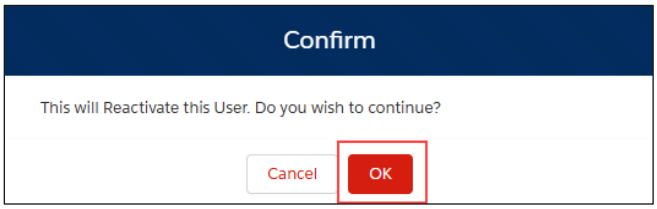
2. In the **Name** column, select the user name hyperlink of the user to reactivate.

   The **User Name** pane displays.



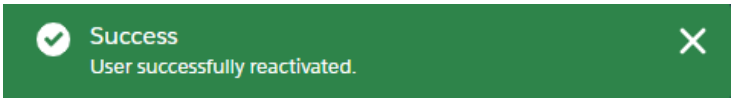
3. At the top, right select the **Reactivate** button.

The **Confirm** dialog box displays.



4. Select the **OK** button.

   The **User successfully reactivated** message displays.

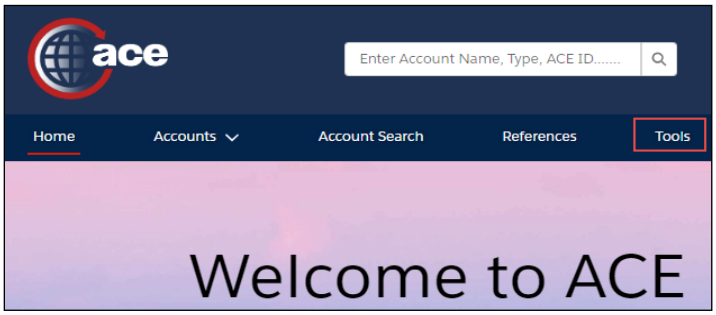


5. In the **User Name** pane, select the **Roles** tab to view and ensure the proper access permissions are assigned.

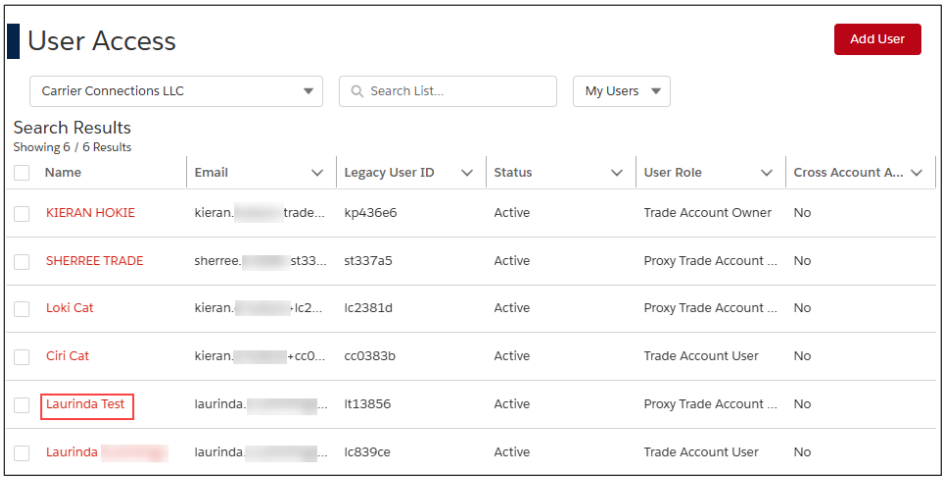
   Reference Topic 3: Search, View, and Edit the User Details and Permissions for details to update user permissions in the **Roles** tab.

REVOKE A USER

1. In the **Welcome to ACE** home page, select the **Tools** tab.

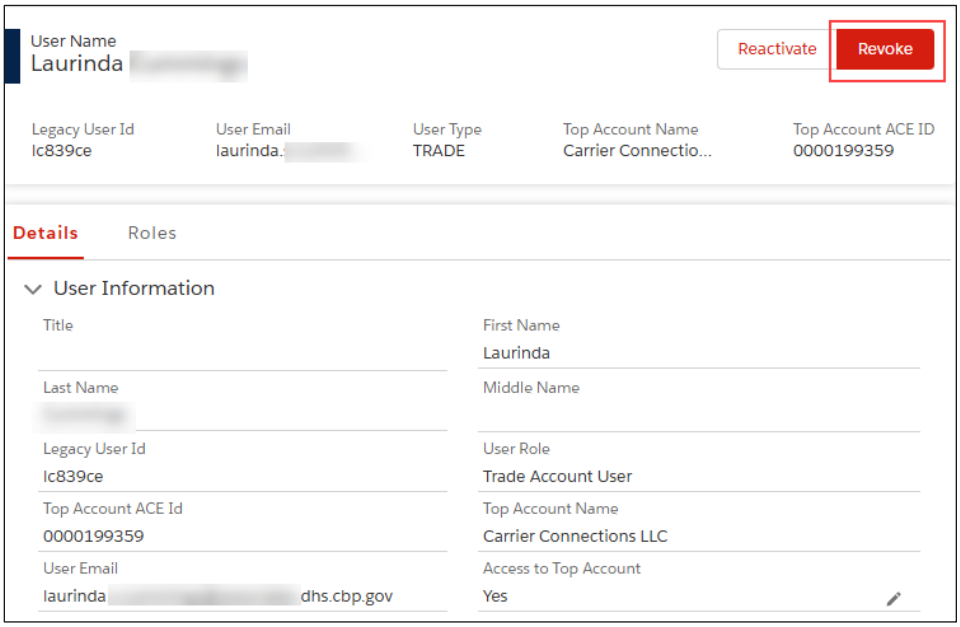


   The **User Access** pane displays.



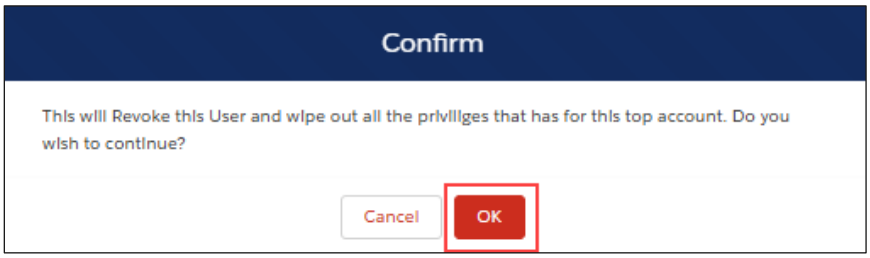
2. In the **Name** column, select the user name hyperlink of the user to revoke.

The **User Name** pane displays.



3. In the upper, right select the **Revoke** button.

   The **Confirm** dialog box displays.



4. Select the **OK** button.

   The **User has been Revoked Successfully** message displays.

