



ACE Truck e-Manifest - Trade

Create a Bill of Lading

August 2020



U.S. Customs and
Border Protection





DEVELOPMENT NOTICE

Development for the new ACE Truck e-Manifest System is ongoing; this document reflects functionality as of August 2020.

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TOPIC 1: INTRODUCTION

The new ACE Truck e-Manifest web-based application for the Trade allows carriers to submit electronic truck manifests (formerly trips) combined with bills of lading (formerly shipments) to U.S. Customs and Border Protection (CBP) prior to a truck's arrival at a United States land border crossing.

One of the main processing functions included in the **Truck Manifest Trade Portal** application is creating a manifest and bill of lading (BOL) for truck trade users. The create functions include a new wizard feature that guides the user through a series of well-defined steps, entering data in each step and proceeding to the next step until completion.

The BOL may be created during the manifest creation process or created and saved separately to add to the manifest later.

This Quick Reference Guide (QRG) covers the process to create a bill of lading separately and save it to add to the manifest later.

The steps included in the **Create BOL** process are:

- **Step 1 Header**
- **Step 2 Commercial Parties**
- **Step 3 Commodities**
- **Step 4 Review**
- **Step 5 Save BOL**

To start the **Create BOL** process, select the **Create** button on a main tab of the application to display the **Create** drop-down menu and select the **Bill of Lading** option. This displays the **Create BOL** landing page.

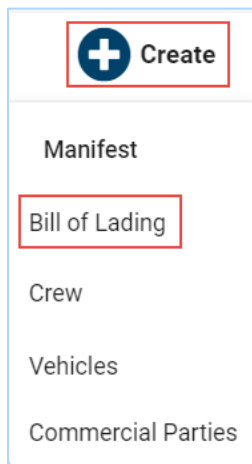


Figure 1: Create Menu – Bill of Lading Option

Reference the **Access and Navigate the Truck Manifest Trade Portal QRG** for more information about login and the four main tabs. Reference the **Create a Manifest QRG** for details to create the manifest and add a BOL during the manifest creation.



Create BOL Prepared by: ZZZZ Status:

1 Header **2** Commercial Parties **3** Commodities Review

Header *Enter the Bill Issuer SCAC, Bill of Lading Number, and Bill of Lading Type to Save as Draft or continue*

Bill Issuer SCAC * <u>ZZZZ - SCAC Code ZZZZ</u>	Bill of Lading Number * <u>ZZZZBOL Number must be</u>	House Bill of Lading Number	Bill of Lading Type *
Estimated Date of Arrival * <u>MM/DD/YYYY</u>	Estimated Time of Arrival * <u>Local Time in HH:MM</u>	Estimated Arrival Port *	Port of Lading *
Place of Receipt	Authorized SCAC	Is this subject to FDA requirements? * <input type="radio"/> Yes <input type="radio"/> No	

Figure 2: Create BOL Landing Page – Steps in Create BOL Process





TOPIC 2: STEP 1 HEADER

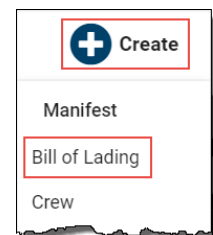
INTRODUCTION

The **Create BOL** landing page defaults to the **Step 1 Header** section. The **Header** section allows entering header information for the bill of lading. Fields that are required are marked with an asterisk (*).

Figure 3: Create BOL – Step 1 Header Section

ADD HEADER INFORMATION TO THE BOL

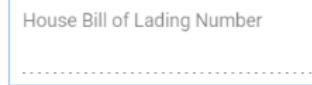
1. At the top of the **Truck Manifest Trade Portal**:
 - a. Select the **Create** button to display the drop-down menu.
 - b. In the **Create** drop-down menu, select the **Bill of Lading** option.



2. In the **Create BOL** landing page, in the **Header** section, complete the header information:
 - a. In the **Bill Issuer SCAC *** field, the Standard Carrier Alpha Code (SCAC) of the carrier account is prefilled. To change this field, highlight the existing SCAC and type a *different* SCAC.
 - b. In the **Bill of Lading Number *** field (formerly Shipment Control #), type the *bill of lading number*.



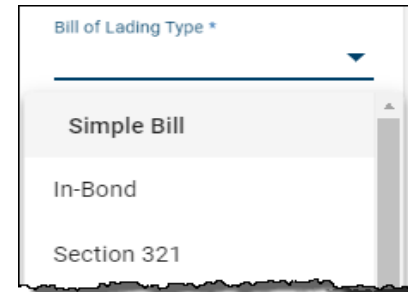
- c. The **House Bill of Lading Number** field is gray indicating this field is not currently available but may be included in a future release.
- d. Select the **Bill of Lading Type *** (formerly Shipment Release Type) drop-down menu and select the type of bill of lading.



House Bill of Lading Number



NOTE: Simple Bill was formerly Pre-Arrival Processing System (PAPS).



Bill of Lading Type *

- Simple Bill
- In-Bond
- Section 321

In-Bond requires entering additional fields as appropriate (In-Bond Type and Number, Bonded Carrier ID, Onward Carrier SCAC, and Transfer Bonded Carrier ID) and more depending on In-Bond Type (US Port of Destination, Foreign Port of Destination, Est Date of Departure from US, Mexican Pedimento Number, and Canadian BOL Number). In addition, as appropriate when the commodity is added later (Customs Shipment Value).

Section 321 and 3311-US Goods Returned requires entering additional fields when the commodity is added later (Customs Shipment Value and Country of Origin).

GN1 Exemptions/Goods Astray requires answering the “Is it Goods Astray?” question with a Yes or No response. A Yes response requires entering a Date of Departure from US and affirming that goods have not left carrier or foreign countries custom control.

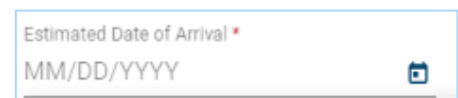
Instruments of International-Traffic (IIT) requires entering an additional field (Bonded Carrier ID).



IMPORTANT: For IITs, a bill with an IIT bill type must be created.

The four types grayed out at the bottom of the drop-down menu (Carnet, DOD, FTZ, and International Mail) are future functionality.

- e. If the BOL is added during the create manifest process, the next three fields (**Estimated Date of Arrival**, **Estimated Time of Arrival**, and **Estimated Arrival Port**) will be prefilled from the manifest values. If appropriate, these field values can be changed.
- f. In the **Estimated Date of Arrival *** field, type the *estimated arrival date* in MM/DD/YYYY format or select the **Calendar** icon and select the estimated arrival date.



Estimated Date of Arrival *

MM/DD/YYYY



NOTE: The **Estimated Date of Arrival** calendar defaults to the current date when selected.



- g. In the **Estimated Time of Arrival *** field, type the *estimated arrival time* in HH:MM local time format or select the **Clock** icon and select the estimated arrival time.

Estimated Time of Arrival *
Local Time in HH:MM format

- h. In the **Estimated Arrival Port *** field, type the *name or port code of the first expected US port of arrival* or select from the drop-down menu.

Estimated Arrival Port *
BU
0207 - BURLINGTON, VT
0901 - BUFFALO-NIAGARA F
3305 - BUTTE, MT



NOTE: As a name or port code is typed, the list of approved ports displays in a drop-down menu for possible selection.

- i. In the **Port of Lading *** field, type the *name or port code of the foreign port of lading* or select from the drop-down menu.

Port of Lading *
YU
80105 - YUKON
97131 - YUCATAN



NOTE: As a name or port code is typed, the list of approved ports displays in a drop-down menu for possible selection.

If the cargo was not loaded at a port, select the nearest port to the cargo loading location.

- j. If appropriate, in the **Place of Receipt** field, type the *city or country where the carrier took possession of the cargo*.

- k. If appropriate, in the **Authorized SCAC** field, type the *SCAC for the authorized carrier*.

- l. For **Is this subject to FDA requirements? ***:

- i. If this BOL is subject to FDA requirements, select the **Yes** radio button.

Is this subject to FDA requirements? *
 Yes No

- ii. If this BOL is not subject to FDA requirements, select the **No** radio button.

- 3. Select a button option at the bottom right of the **Header** section:

- a. Select the **Close** button to exit the **Create BOL** process without saving the **Header** information. In the **Are you sure you would like to close this Bill of Lading?** dialog box, select the **Yes** or **No** button.

If **Yes** is selected and the first four required fields (**Bill Issuer SCAC**, **Bill of Lading Number**, **Bill of Lading Type**, and **Estimated Date of Arrival**) are provided, the **Header** information will automatically **Save as Draft**.





- b. Select the **Save as Draft** button to save the **Header** information for now and complete the **Create BOL** process later.



Important: The first four required fields (**Bill Issuer SCAC**, **Bill of Lading Number**, **Bill of Lading Type**, and **Estimated Date of Arrival**) must be completed to select the **Save as Draft** button.

- c. Select the **Next** button to save the **Header** information and move forward to the next step for selecting or adding commercial parties to the BOL. A check mark will then display for the **Header** step at the top of the **Create BOL** page indicating that it is complete.



Important: All required fields must be completed to select the **Next** button.









TOPIC 3: STEP 2 COMMERCIAL PARTIES – SHIPPERS AND CONSIGNEES

INTRODUCTION

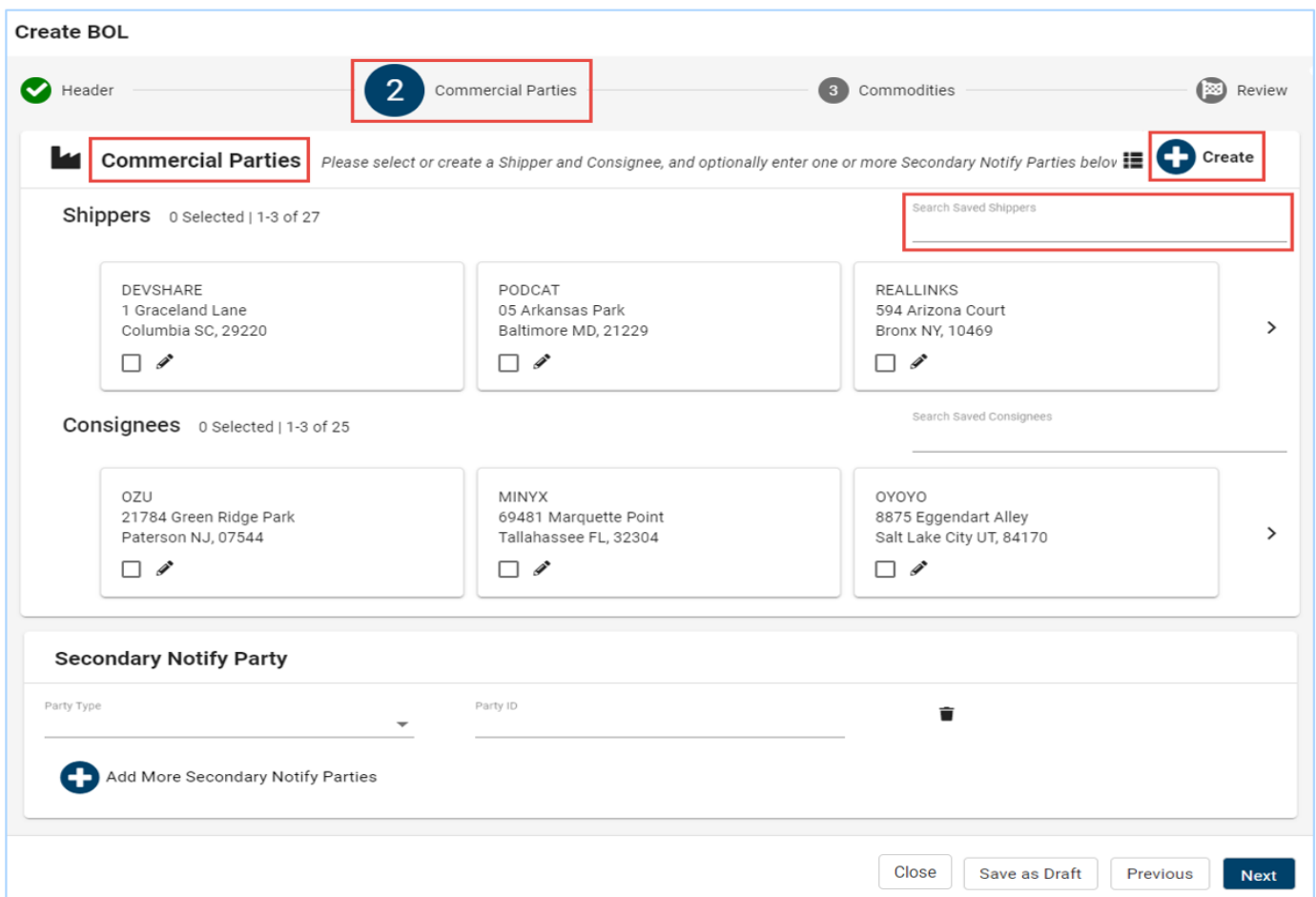
The next step in the **Create BOL** process is to add commercial party information. The **Create BOL – Step 2 Commercial Parties** section allows adding commercial parties to the bill of lading by selecting a shipper and/or consignee saved to the carrier account or adding new commercial parties. Secondary party to notify information can be entered before moving to the next step in the **Create BOL** process.

All shippers and consignees currently saved to the carrier account will display in the selectable **Shipper Cards** and **Consignee Cards** that display by default in the **Commercial Parties** section. The **Table View** icon  displays the commercial parties information in a table format.

The **Search** filter is used to locate a particular shipper or consignee when numerous cards are displayed. The **Forward** icon  is used to view additional cards.

The **Shipper** and **Consignee Cards** are selected with the checkbox or updated with the **Edit** icon . An **X** icon  in the upper right indicates an issue with the shipper or consignee information. Select the **Edit** icon to resolve it.

The **Create** button allows adding a new shipper or consignee to the BOL. Reference the **Maintain Account Data QRG** for the details to add and save a shipper or consignee to the carrier account.



Create BOL

Header **2 Commercial Parties** 3 Commodities Review

Commercial Parties Please select or create a Shipper and Consignee, and optionally enter one or more Secondary Notify Parties below **Create**

Shippers 0 Selected | 1-3 of 27

Search Saved Shippers

DEVSHARE
1 Graceland Lane
Columbia SC, 29220

PODCAT
05 Arkansas Park
Baltimore MD, 21229

REALLINKS
594 Arizona Court
Bronx NY, 10469

Consignees 0 Selected | 1-3 of 25

Search Saved Consignees

OZU
21784 Green Ridge Park
Paterson NJ, 07544

MINYX
69481 Marquette Point
Tallahassee FL, 32304

OYOYO
8875 Eggendart Alley
Salt Lake City UT, 84170

Secondary Notify Party

Party Type Party ID

Add More Secondary Notify Parties


Close Save as Draft Previous **Next**

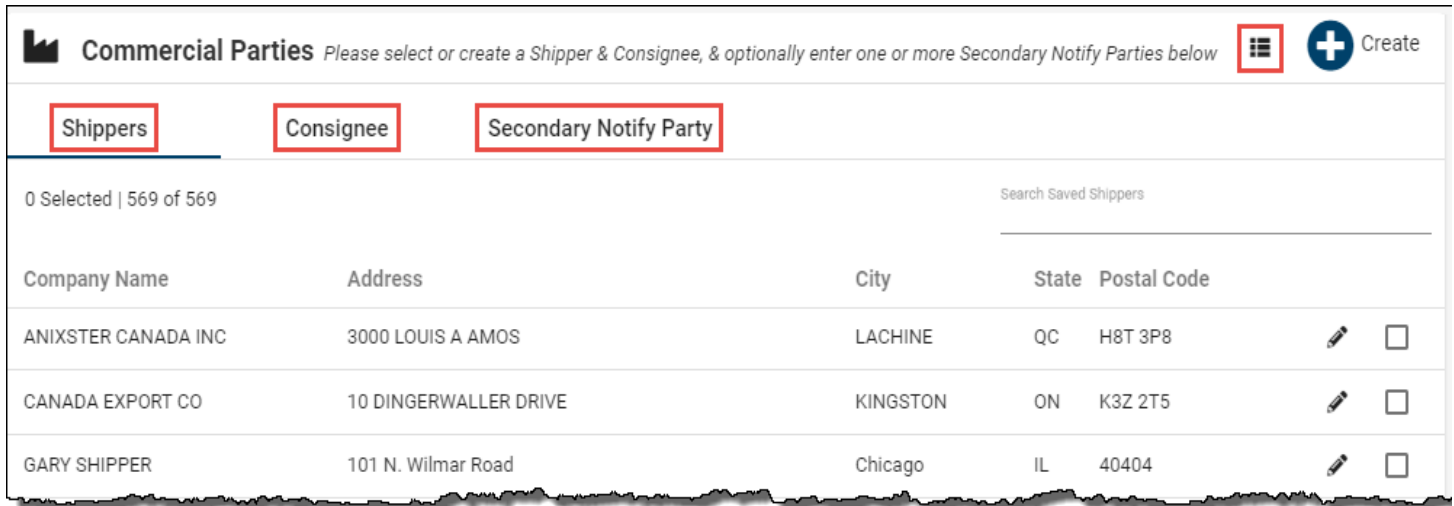
Figure 4: Create BOL – Step 2 Commercial Parties Section - Shipper and Consignee Cards





TABLE VIEW

The **Table View** icon  displays the shippers, consignee, and secondary notify party information in the **Commercial Parties** section in a table format list. The **Shippers**, **Consignee**, and **Secondary Notify Party** tabs at the top allow displaying the table list for each of the different types of commercial parties. Select the **Table View** icon again to return to displaying the **Shipper** and **Consignee Cards**.






Company Name	Address	City	State	Postal Code		
ANIXSTER CANADA INC	3000 LOUIS A AMOS	LACHINE	QC	H8T 3P8		<input type="checkbox"/>
CANADA EXPORT CO	10 DINGERWALLER DRIVE	KINGSTON	ON	K3Z 2T5		<input type="checkbox"/>
GARY SHIPPER	101 N. Wilmar Road	Chicago	IL	40404		<input type="checkbox"/>

Figure 5: Create BOL – Step 2 Commercial Parties Section – Table View

SEARCH FILTER

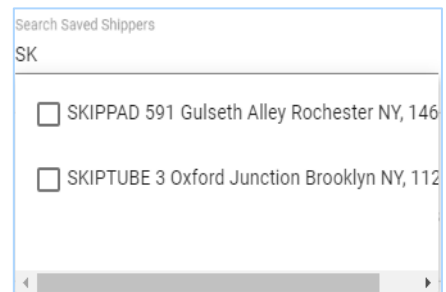
The **Search Saved Shippers** and **Search Saved Consignees** filters allow searching for specific shippers and consignees displayed in the **Commercial Parties** section that are associated with the account or newly added.

USE THE SEARCH FILTER

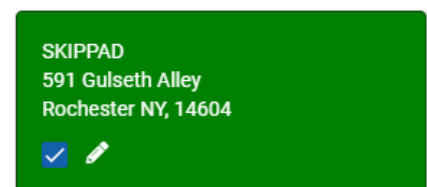
1. Select the **Search Saved Shippers** or the **Search Saved Consignees** field to display the drop-down list of shippers or consignees added to the carrier account or saved to the bill of lading.
2. If necessary, type a name or partial name to narrow the list.



NOTE: As you type, the list of shippers or consignees narrows to only those names that match the typed text.





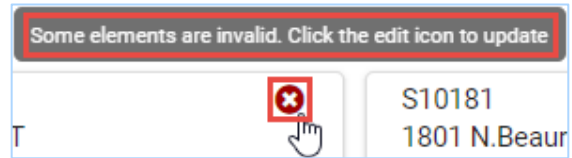
3. In the drop-down list of shippers or consignees, select the checkbox for a specific shipper or consignee. This selects the corresponding **Shipper** or **Consignee Card** as well.






EDIT COMMERCIAL PARTY INFORMATION

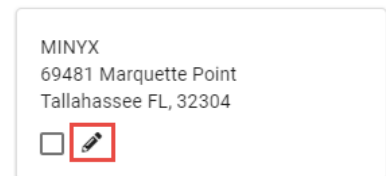
The **Edit** icon  in the **Shipper** or **Consignee Card** allows updating the shipper or consignee information. An **X** icon  in the upper right of the card indicates an issue with the information. Hover over the **X** icon for an explanation.



EDIT SHIPPER OR CONSIGNEE INFORMATION

1. In the lower left corner of a **Shipper** or **Consignee Card**, select the **Edit** icon.

The **Edit Commercial Parties** pane displays.



2. In the **Edit Commercial Parties** pane, update the information fields as appropriate.



Company Name *	Street *	Apartment, Suite, Unit
Minyx	69481 Marquette Point	
City *	Country *	State / Province *
Tallahassee	US - UNITED STATES	FL - Florida
Zip Code (US) *	Email Address *	Phone Number
32304	whancornb@google.ca	(850) 356-0785

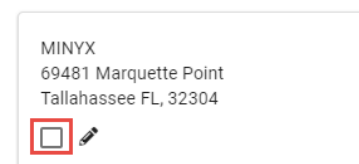
3. In the bottom right corner of the pane, select the **Update** button.

ADD SAVED COMMERCIAL PARTY CARDS TO THE BOL

The **Checkbox** in **Shipper** and **Consignee Cards** allows selecting a specific shipper or consignee to add to the BOL. If a secondary party needs to be notified, the **Secondary Notify Party** section allows adding the party information.

ADD A SAVED SHIPPER OR CONSIGNEE TO THE BOL

1. If required, scroll using the **Forward** and **Backward** icons ,  on the left and right to view additional shippers or consignees.
2. In the lower left corner of a **Shipper** or **Consignee Card**, select the **Checkbox**.

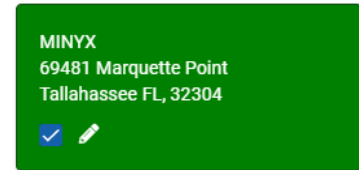




The selected **Shipper** or **Consignee Card** is checked and highlighted to indicate it is added to the BOL.




NOTE: Select the **Checkbox** again to deselect the specific **Shipper** or **Consignee Card** and remove the shipper or consignee from the BOL.



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

a. Select the **Party Type** drop-down menu and select the type of secondary party to notify.

b. In the **Party ID** field, type the *party identification*.

c. If a secondary notify party is added in error, select the **Delete** icon  to delete it.

d. Select the **Add More Notify Secondary Parties** button to add more secondary parties.

ADD A NEW SHIPPER OR CONSIGNEE TO THE BOL

The **Create** button in the **Commercial Parties** section allows adding a new shipper or consignee to the BOL not previously saved to the account. A **Save to Account** option allows adding the new shipper or consignee to the carrier account as well as the BOL. Required fields are marked with an asterisk (*).

ADD A NEW SHIPPER OR CONSIGNEE TO THE BOL

1. In the **Commercial Parties** section, select the **Create** button.

The **Add Commercial Parties** pane displays.

Commercial Parties Enter Commercial Party Information then add to Bill of Lading

Type of Party *
 Shipper Consignee

Company Name * Street * Apartment, Suite, Unit

City * Country * State / Province

Zip Code (US) * Email Address Phone Number

Save to Account? *
 Yes No

Cancel Add





2. For **Type of Party ***, select the **Shipper** or **Consignee** radio button.
3. In the **Company Name *** field, type the *company name*.
4. In the **Street *** field, type the *street address*.
5. If appropriate, in the **Apartment, Suite, Unit** field, type a *number*.
6. In the **City *** field, type the *city name*.
7. In the **Country *** field, type the *country name* and select the country from the displayed menu.



NOTE: Depending upon the **Country** selected, the **State/Province** field may change from being grayed out to being required.

8. If appropriate, in the **State/Province *** field, type the *state or province name* and select the state or province from the displayed menu.
9. In the **Zip Code (US) *** field, type the *zip code or postal code*.



NOTE: Depending upon the **Country** selected, the **Zip Code** field may change to the **Postal Code** field.

10. If appropriate, in the **Email Address** field, type an *email address*.
11. If appropriate, in the **Phone Number** field, type a *phone number*.
12. For **Save to Account? ***:

- a. Select the **No** radio button to add the shipper or consignee only to the BOL.
- b. Select the **Yes** radio button to add the shipper or consignee to the BOL and the carrier account.

13. Select the **Add** button.

A successfully processed message displays and the new **Shipper** or **Consignee Card** displays with highlighting and a check mark.





COMPLETE THE PROCESS TO ADD COMMERCIAL PARTIES TO THE BOL

Once a shipper and consignee are selected to add to the BOL, the button options at the bottom of the **Commercial Parties** section allow deciding how to proceed; close the section, save the information as draft, move backward to the previous step, or move forward to the next step.

COMPLETE PROCESS TO ADD SHIPPERS AND CONSIGNEES TO THE BOL

1. Select a button option at the bottom right of the **Commercial Parties** section:



- a. Select the **Close** button to exit the **Commercial Parties** section without saving. In the **Are you sure you would like to close this Bill of Lading?** dialog box, select the **Yes** or **No** button.
- b. Select the **Save as Draft** button to save the **Commercial Parties** information for now and complete the **Create BOL** process later.
- c. Select the **Previous** button to save the **Commercial Parties** information and move backward to the previous step for **Header** information.
- d. Select the **Next** button to save the **Commercial Parties** information and move forward to the next step for adding commodities to the BOL. A check mark will display for the **Commercial Parties** step at the top indicating that it is complete.



TOPIC 4: STEP 3 COMMODITIES


INTRODUCTION

The next step in the **Create BOL** process is to add commodity information. The **Create BOL – Step 3 Commodities** section allows adding a commodity to the bill of lading. Adding **Commodity Cards** in the **Account** tab to display in the **Commodities** section is future functionality.

The **Create** button allows adding commodities to the BOL. Required fields are marked with an asterisk (*).

The **Table View** icon  displays the commodities information in a table format.

The **Search** filter is used to locate a particular commodity when numerous **Commodity Cards** are displayed.

Added **Commodity Cards** can be selected with the checkbox or updated with the **Edit** icon .

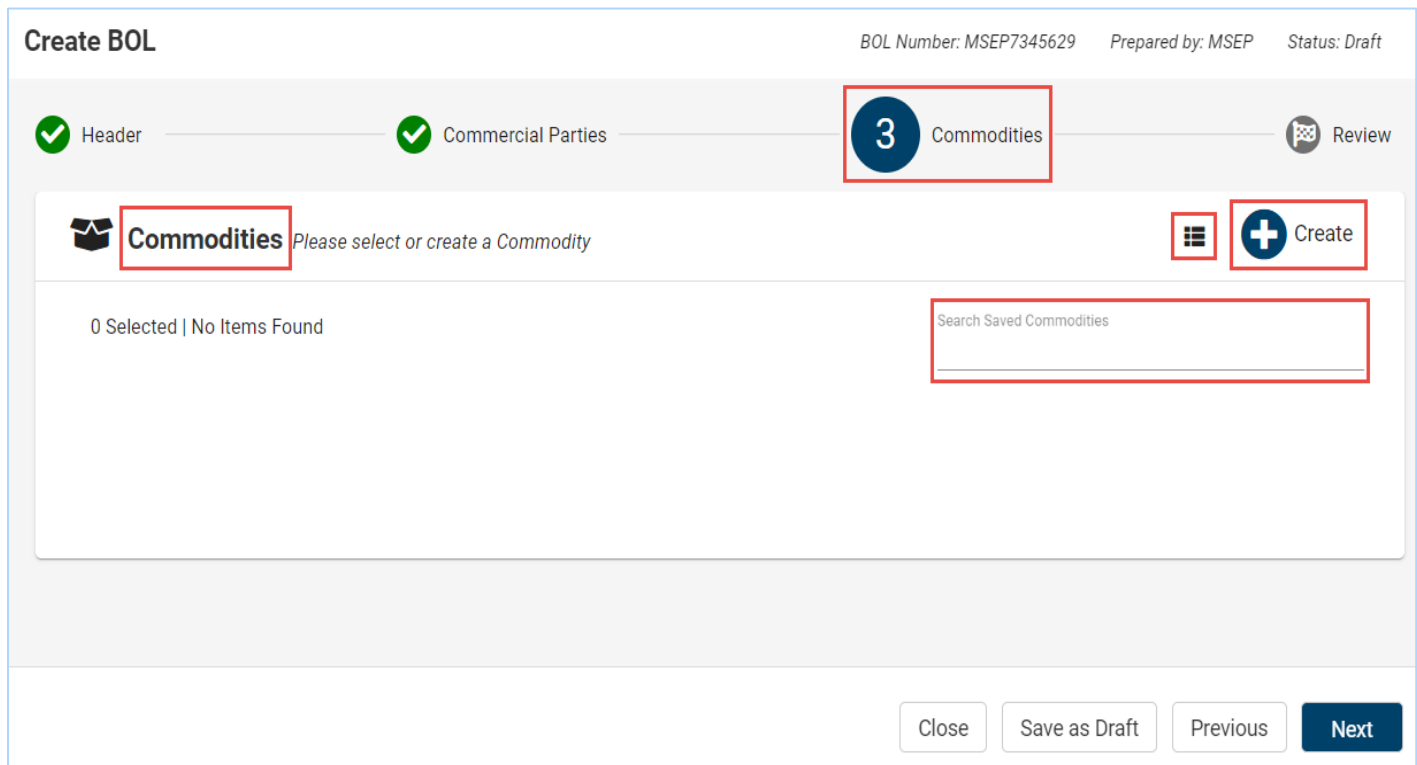


Figure 6: Create BOL – Step 3 Commodities Section

ADD A NEW COMMODITY TO THE BOL

The **Create** button in the **Commodities** section allows adding a new commodity to the BOL not previously created and saved.



NOTE: Currently, commodities cannot be saved to the carrier account. The functionality to add a commodity template to the carrier account may be included in a future release.



ADD A NEW COMMODITY TO THE BOL

1. In the **Commodities** section, select the **Create** button.
The **Add Commodities** pane displays.

Commodities Enter Commodity Information then add to Bill of Lading

Cargo Description *

Quantity * Unit of Measurement * Weight * Unit of Measurement *

Where's Your Commodity

Location
Select

Does your Commodity include any of the following? *

Hazmat Marks and Numbers VIN None

Save to Account? *

Yes No

Cancel Add

2. In the **Cargo Description** * field, type a *specific cargo description for the BOL commodity*.
3. In the **Quantity** * field, type the *quantity*.
4. In the **Unit of Measurement** * field, type the *unit of measure* and select the unit of measure from the displayed menu.
5. In the **Weight** * field, type the *weight*.
6. In the **Unit of Measurement** * field, type the *unit of measure* and select the unit of measure from the displayed menu.
7. If the **Bill of Lading Type** is **Section 321** or **3311-US Goods Returned**, the corresponding section will display with the **Customs Shipment Value** * field and **Country of Origin** * field. If the **Bill of Lading Type** is **In-Bond**, the **In-Bond** section will display with the **Customs Shipment Value** * field.

Complete the field(s) as necessary. If appropriate, validations of the value may apply.

Section 321 Required based on BOL type selection

Customs Shipment Value * Country of Origin *

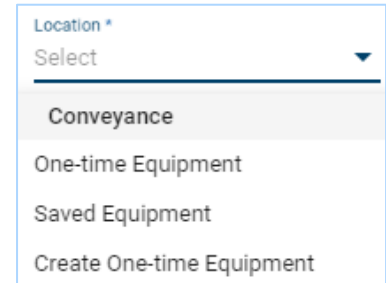


8. In the **Where's Your Commodity** section:

- a. In the **Location *** drop-down menu, select the location of the commodity; the equipment or the conveyance where the commodity is located.



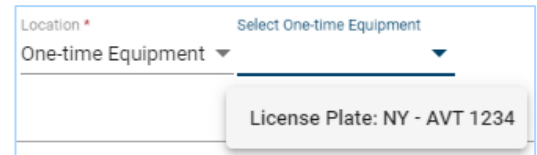
NOTE: For split bills, select the **Conveyance** location.



Location *
Select
Conveyance
One-time Equipment
Saved Equipment
Create One-time Equipment

- b. For a commodity located in equipment added to another commodity in the BOL using the **Location** option **Create One-time Equipment** or added to the manifest during the create manifest process as a one-time equipment, select the **One-time Equipment** option.

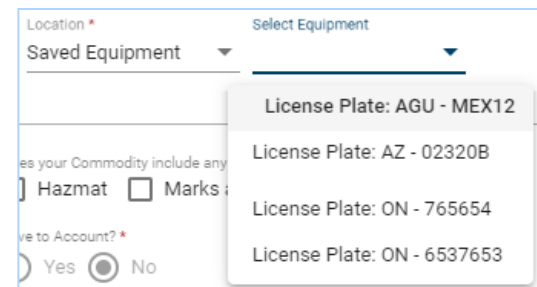
- i. In the **Select One-time Equipment** drop-down menu that displays to the right, select the one-time equipment added to another commodity or the manifest.



Location * Select One-time Equipment
One-time Equipment
License Plate: NY - AVT 1234

- c. For a commodity located in equipment saved to the account and added to: another commodity in the BOL, the manifest, or the current commodity, select the **Saved Equipment** option.

- i. In the **Select Equipment** drop-down menu that displays to the right, select the equipment saved to the account that contains the commodity.



Location * Select Equipment
Saved Equipment
License Plate: AGU - MEX12
License Plate: AZ - 02320B
License Plate: ON - 765654
License Plate: ON - 6537653



NOTE: If the saved equipment was added to another commodity or the manifest, it will be listed at the top with bold text.

- d. For a commodity located in equipment that has not been saved to the manifest nor to the account and needs to be added now as new equipment, select the **Create One-time Equipment** option.



Where's Your Commodity

Location *
Create One-time Equipment ▾

Equipment Type * ▾ Equipment Number _____

License Plates

License Plate Number	Country of Registration	State / Province	
_____	_____	_____	

Add New License Plate

Seal

Seal Number _____

Add New Seal

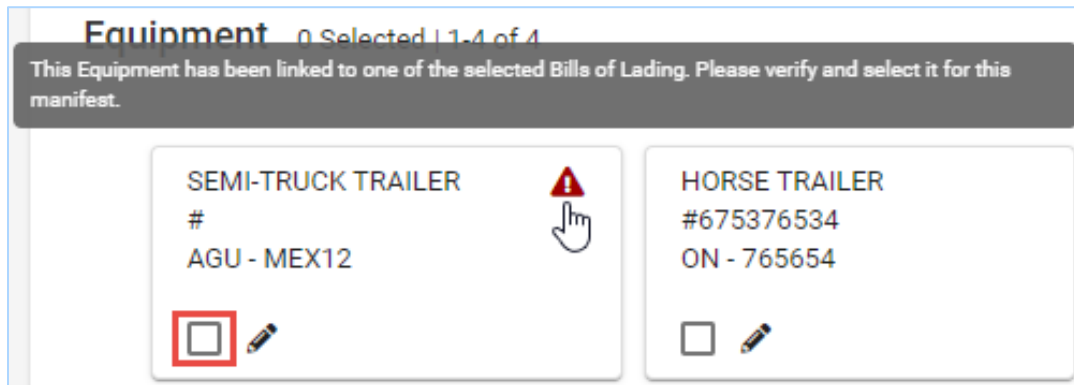
Save to Account? *
 Yes No

- i. In the **Equipment Type** * drop-down menu, select the type of equipment.
 - ii. In the **Equipment Number** field, type the *equipment number*.
 - iii. In the **License Plates** section, in the **License Plate Number** * field, type the *license plate number*.
 - iv. In the **License Plates** section, in the **Country of Registration** * field, type the *country name* and select it from the menu that displays as you type.
 - v. In the **License Plates** section, in the **State/Province** * field, type the *state or province name* and select it from the menu that displays as you type.
 - vi. In the **Seal** section, if appropriate, in the **Seal Number** field, type the *seal number*.
- NOTE:** The **Save to Account?** * radio buttons are currently grayed out and not available. This is future functionality.
- e. Otherwise, for a commodity located in the conveyance, select the **Conveyance** option.
In the **Select Conveyance** drop-down menu that displays to the right, the **Conveyance** option is selected automatically.





NOTE: If the equipment is added to the commodity in an unassociated BOL later during the create manifest process, the **Equipment** card will automatically be added to the **Vehicle** step in the manifest and an **Information** icon will display in the upper right corner of the equipment card. Hovering over the icon will display a helpful warning message to verify and select the equipment card to add it to the manifest.



9. For **Does your Commodity include any of the following? ***, select the applicable checkbox. If appropriate, more than one checkbox can be checked.

Does your Commodity include any of the following? *

Hazmat Marks and Numbers VIN None

- a. For hazmat materials, select the **Hazmat** checkbox.

The **Hazmat** section displays.

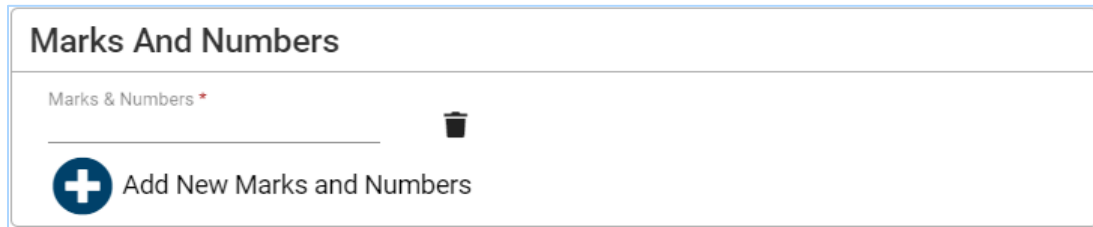
- In the **Hazmat Code *** field, type the *hazmat code* and select it from the menu that displays as you type.
- In the **Contact Name *** field, type the *hazmat contact name*.
- In the **Contact Phone Number *** field, type the *hazmat contact phone number*.
- Select the **Add New Hazmat** button to add additional hazmat information.



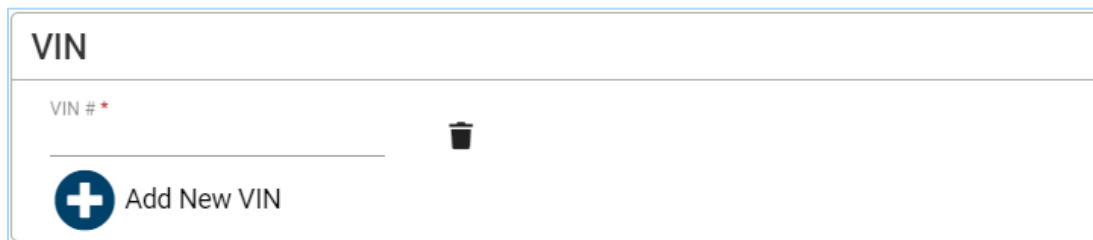
NOTE: If the insurance information was not added with the conveyance, it will need to be added during the create manifest process (edit the conveyance).

A hazmat symbol will display in the upper right corner of the commodity and bill of lading cards.

- b. For materials containing marks and numbers, select the **Marks and Numbers** checkbox.
The **Marks and Numbers** section displays.



- i. In the **Marks and Numbers** * field, type the *marks and numbers*.
- ii. Select the **Add New Marks and Numbers** button to add additional marks and numbers.
- c. For materials containing VIN numbers, select the **VIN** checkbox.
The **VIN** section displays.



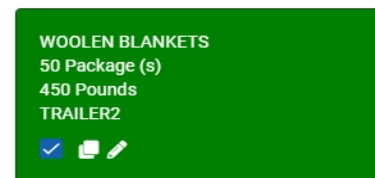
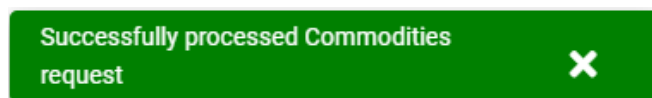
- i. In the **VIN #** * field, type the *VIN numbers*.
- ii. Select the **Add New VIN** button to add additional VIN numbers.
- d. Otherwise, select the **None** checkbox.



NOTE: The **Save to Account?** * radio buttons are currently grayed out and not available. This is future functionality to save a commodity template.

10. Select the **Add** button.

A successfully processed message displays and the new **Commodity Card** displays with highlighting and a check mark.



NOTE: Select the **Checkbox** again to deselect the specific **Commodity Card** to remove the commodity from the BOL.



- If the **Bill of Lading Type** is **Section 321, 3311-US Goods Returned**, or **In-Bond**, the value of the **Customs Shipment Value *** field will display in the **Commodity Card**.

In addition, for **Section 321** only, the **Commodities** title includes an explanation of the total value limit and an oval object that displays the total value amount for all selected commodities, which turns red if the total exceeds the limit.

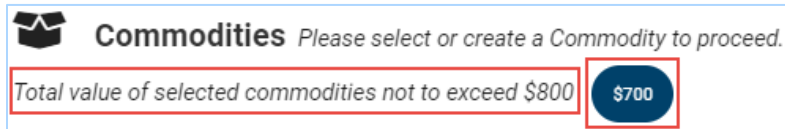
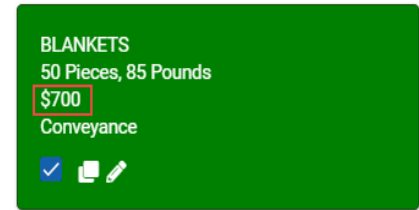




TABLE VIEW

Once commodities are added to the BOL, the **Table View** icon  displays the commodities in a table format list. Select the **Table View** icon  again to return to displaying the **Commodity Cards**.

Cargo Description	Quantity	Weight	Location
WOOLEN CAPES	200 Pieces	325 Pounds	Conveyance
WOOLEN CAPES	100 Pieces	225 Pounds	Conveyance

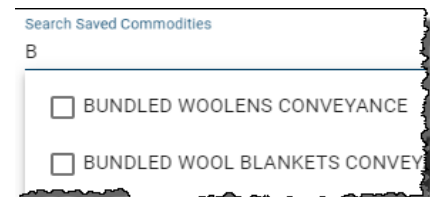
Figure 7: Create BOL – Step 3 Commodities Section – Table View

SEARCH FILTER

The **Search Saved Commodities** filter allows searching for specific **Commodity Cards** when numerous cards are displayed in the **Commodities** section.

USE THE SEARCH FILTER

- Select the **Search Saved Commodities** field to display the drop-down list of commodities added to the BOL.





2. If necessary, type a name or partial name to narrow the list.



NOTE: As you type, the list of commodities narrows to only those names that match the typed text.


3. In the drop-down list of commodities, select the checkbox for a specific commodity. This selects the corresponding **Commodity Card** as well.



EDIT COMMODITY INFORMATION

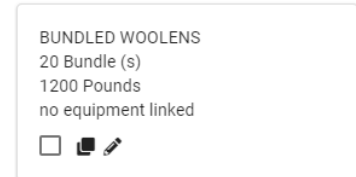
The **Edit** icon  in the **Commodity Card** allows updating specific commodity information.




IMPORTANT: The **Clone** icon  allows creating a duplicate commodity (and **Commodity Card**). Selecting the **Clone** icon displays the **Edit Commodities** pane of the new duplicated commodity to allow adjustments, such as quantities or location of commodity. Select the **Add** button to save.

EDIT COMMODITY INFORMATION

1. In the lower left corner of a **Commodity Card**, select the **Edit** icon.
The **Edit Commodities** pane displays.



2. In the **Edit Commodities** pane, update the information fields as appropriate. Reference the [Add a New Commodity to the BOL](#) section above for detailed field descriptions.

 **Commodities** *Enter Commodity Information then add to Bill of Lading*

Cargo Description *
BUNDLED WOOLENS

Quantity and Unit of Measurement * Weight and Unit of Measurement *
20 BDL - Bundle 1200 LB - Pounds

Where's Your Commodity

Location Select Conveyance
Conveyance Conveyance

Does your Commodity include any of the following? *
 Hazmat Marks and Numbers VIN None

3. In the bottom right corner of the pane, select the **Update** button.





COMPLETE THE PROCESS TO ADD COMMODITIES TO THE BOL

Once all new commodities are added and selected, the button options at the bottom of the **Commodities** section allow deciding how to proceed; close the section, save the information as draft, move backward to the previous step, or move forward to the next step.

COMPLETE PROCESS TO ADD COMMODITIES TO THE BOL

1. Select a button option at the bottom right of the **Commodities** section:




- a. Select the **Close** button to exit the **Commodities** section without saving. In the **Are you sure you would like to close this Bill of Lading?** dialog box, select the **Yes** or **No** button.
- b. Select the **Save as Draft** button to save the **Commodities** information for now and complete the **Create BOL** process later.
- c. Select the **Previous** button to save the **Commodities** information and move backward to the previous step for **Commercial Parties** information.
- d. Select the **Next** button to save the **Commodities** information and move forward to the next step to review the BOL. A check mark will display for the **Commodities** step at the top indicating that it is complete.







TOPIC 5: FINAL STEP REVIEW AND SAVE A BILL OF LADING

INTRODUCTION


The final step in the **Create BOL** process is to review all the BOL information and edit any information as required. If a step contains validation errors or is missing information, the step title will display an **X**  rather than a check mark.

The **Edit** icon  at the top right of the **BOL Header**, **Commercial Parties**, or **Commodities** section displays the **Edit BOL** pane for that step. This allows editing the displayed information or changing the selected cards. Selecting the step titles at the top of the **Create BOL** page also displays the **Edit BOL** pane for that step.

To edit specific commercial party or commodity information, select the **Edit** icon  at the lower left of a particular **Commercial Party** or **Commodity Card**.

Create BOL BOL Number: ZZZZ675436546 Prepared by: ZZZZ Status: Draft


✓ Header ——— ✓ Commercial Parties ——— ✓ Commodities ——— 🚩 Review


BOL Header ✓ 


Bill Issuer SCAC: ZZZZ BOL Number: ZZZZ675436546 House BOL Number: BOL Type: Simple Bill



Est. Date and Time: 7/17/2020, 12:00 PM Est. Port of Arrival: 0901 - Buffalo-Niagara Falls Port of Lading: 80105 - YUKON



Place of Receipt: Authorized SCAC: Is this subject to FDA Requirements: No

Commercial Parties ✓  1-2 of 2

Consignee
BEST WOOLENS LLC
471 CONSTANCE ST
ALEXANDRA HN, 22102


Shipper
ANIXSTER CANADA C
123 LOUIS A AMOSAA
QUEBEC ON, H8T 3P8


Commodities ✓   1-1 of 1

WOOLEN BLANKETS
50 Package (s), 450 Pounds
Conveyance
 

Save as template?
 Yes No

Close Previous Save and Create Another **Save**

Figure 8: Create BOL – Final Step Review Section





Once all BOL information is accurate and complete, the **Save** button saves the BOL. Alternately, the **Save and Create Another** button allows saving the current BOL and displaying the **Step 1 Header** section of the **Create BOL** landing page to add another BOL.



The saved BOL information will be available to add to a manifest later.

Reference the **Create a Manifest QRG** for details to create the manifest.

REVIEW AND EDIT THE HEADER INFORMATION

1. In the **Review** pane, review the information in the **BOL Header** section.
2. To edit the header information:
 - a. Select the **Header** step title at the top or the **Edit** icon in the upper right corner of the **Header** section.
The **Create BOL - Header** section displays.
 - b. Update the appropriate header information fields.
3. Select the **Review** step title at the top to return to the **Review** pane.



REVIEW AND EDIT THE COMMERCIAL PARTIES INFORMATION

1. In the **Review** pane, in the **Commercial Parties** section, review the **Shipper** and **Consignee Cards**.
2. To change the shipper and/or consignee assigned to the BOL:
 - a. Select the **Commercial Parties** step title at the top or the **Edit** icon  in the upper right corner of the **Commercial Parties** section.
The **Create BOL - Commercial Parties** pane displays the **Shipper** and **Consignee Cards**.
 - b. Select the checkbox in the highlighted **Shipper** and/or **Consignee Cards** to deselect it.
 - c. Select the checkbox in the **Shipper** and/or **Consignee Cards** of the changed shipper and/or consignee.
 - d. Select the **Review** step title at the top to return to the **Review** pane. The changes are saved and the updated card selections display in the **Commercial Parties** section.
3. To change the information of a specific shipper or consignee:
 - a. Select the **Edit** icon  in the lower left corner of the **Shipper** or **Consignee Card**.
The **Create BOL - Commercial Parties** pane displays information for the specific shipper or consignee.
 - b. Update the appropriate shipper or consignee information fields.
 - c. Select the **Update** button to save the edits.
 - d. Select the **Review** step title at the top to return to the **Review** pane.



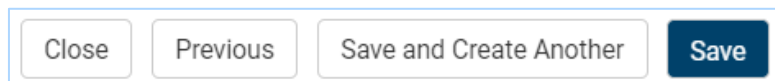


REVIEW AND EDIT THE COMMODITIES INFORMATION

1. In the **Review** pane, in the **Commodities** section, review the **Commodity Cards**.
2. To change a commodity assigned to the BOL:
 - a. Select the **Commodities** step title at the top or the **Edit** icon  in the upper right corner of the **Commodities** section.
The **Create BOL - Commodities** pane displays the **Commodity Cards**.
 - b. Select the checkbox in the highlighted **Commodity Card** to deselect it.
 - c. Select the checkbox in the **Commodity Card** of the changed commodity.
 - d. Select the **Review** step title at the top to return to the **Review** pane. The updated card selection displays in the **Commodities** section.
3. To change the information of a specific commodity:
 - a. Select the **Edit** icon  in the lower left corner of the **Commodity Card**.
The **Create BOL - Commodities** pane displays information for the specific commodity.
 - b. Update the appropriate commodity information fields.
 - c. Select the **Update** button to save the edits.
 - d. Select the **Review** step title at the top to return to the **Review** pane.

COMPLETE PROCESS TO CREATE THE BOL

1. Select a button option at the bottom right of the **Review** pane:



- a. Select the **Close** button to exit the **Review** pane without saving the **BOL** information. In the **Are you sure you would like to close this Bill of Lading?** dialog box, select the **Yes** or **No** button.
- b. Select the **Previous** button to save the **BOL** information and move backward to the previous step for editing the specific **Commodities** information.
- c. Select the **Save and Create Another** button to save the current **BOL** information and display the **Create BOL** page and **Header** section to enter the header information for another new BOL.
- d. Select the **Save** button to save all the **BOL** information.

