

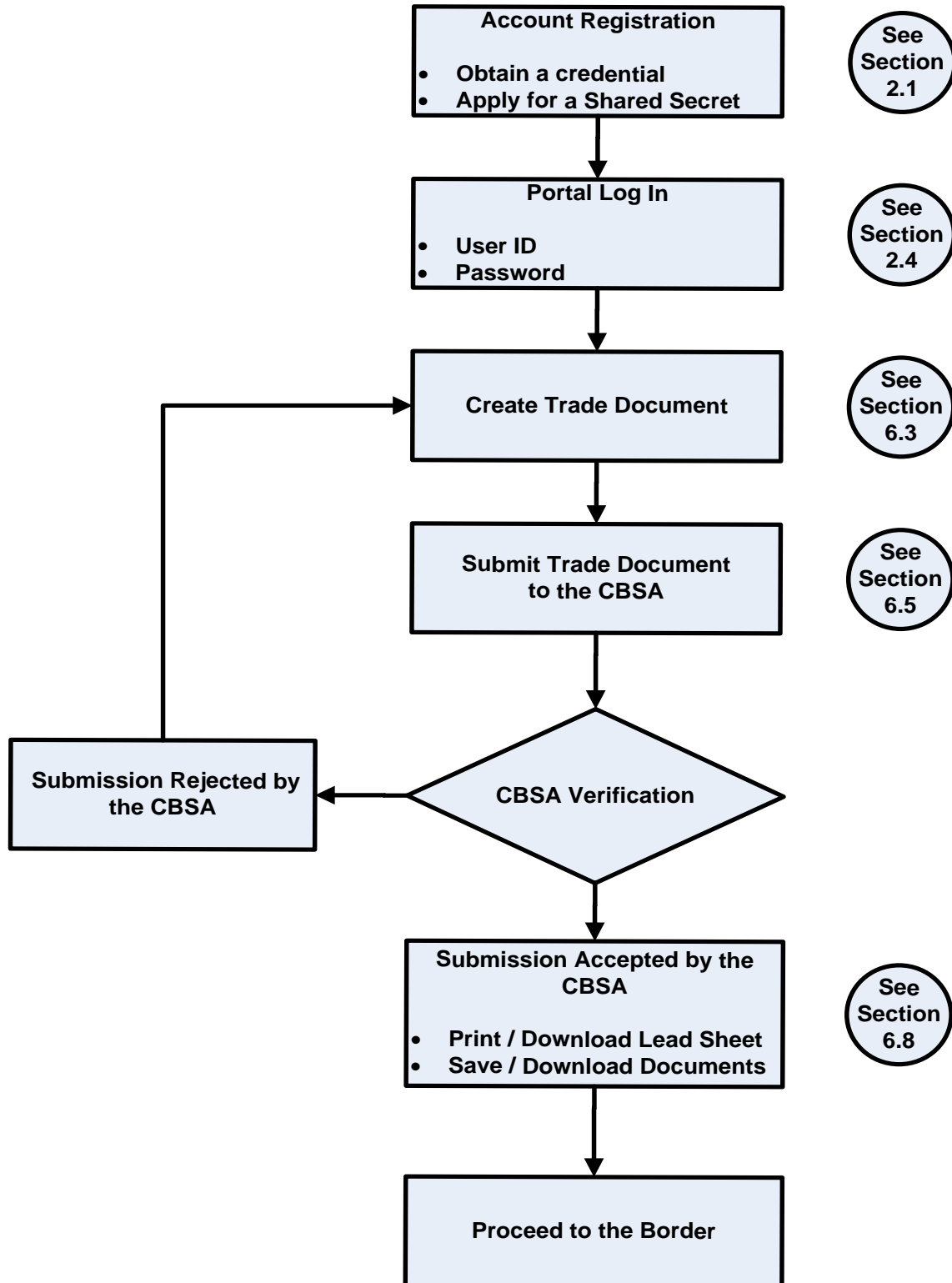


Revision History

Date Changes Made	Version	Changes Made	Changes Made By
September 2012	1.0	Published to the CBSA website	CBSA - Business Transformation and Integration Team
October 2012	1.1	Updates made to the eManifest Portal Overview chart, sections 2.1; 2.2.1; 2.2.2; 2.2.3; 2.3, 2.4; 2.5.1 and figure 2-1.	CBSA - The Portal Team
June 2013	2.0	Updates made to the eManifest Portal Overview chart, sections 1.0; 1.1; 1.2; 1.3; 1.4; 1.5; 1.6; 2.1; 2.2; 2.2.1; 2.2.2; 2.2.3; 2.4; 2.5; 2.5.1; 2.5.2; 2.5.3; 2.5.4; 3.1; 4.1; 4.2; 5.1; 5.2; 5.3; 5.4; 6.0; 6.1; 6.2; 6.3; 6.3.1; 6.3.2; 6.3.3; 6.3.4; 6.4; 6.4.1; 6.4.2; 6.5; 6.5.1; 6.5.2; 6.5.2.1; 6.5.2.2; 6.5.3; 6.5.4; 6.6; 6.7; 6.8; 6.8.1; 6.8.2; 6.9; 6.10; 7.0; 7.1; 7.2; 7.2.1; 7.2.2; 7.2.3; 7.3; 7.3.1; 7.3.2; 7.3.3; 7.3.4; 7.4; 7.5; 8.0; 8.1; 8.2; 9.0; 9.1; 9.2; 9.3; 10.0; 10.1; 10.1.1; 10.1.2; 10.2; 10.3 and to all the figures.	CBSA - The Portal Team
February 2017	2.1	Updates made to the sections 1.3, 1.5, 2.5.3, 2.5.4, 6.2, 6.4.2, 6.5.1, 6.5.2, 6.5.2.1, 6.5.3, 6.5.4, 6.7, 6.9, 6.9.1, 6.9.2	CBSA - The Portal Team



eManifest Portal Overview





eManifest Portal User Guide Table of Contents

1.0	Introduction.....	10
1.1	What is in this Guide?	10
1.2	Technical requirements.....	10
1.3	Client support.....	11
1.4	Features used in this Guide	12
1.5	Symbols used in the Portal	12
1.6	Other reference information	13
2.0	Getting Started	14
2.1	Getting set up in the Portal.....	14
2.2	Before starting	15
2.2.1	Credentials	15
2.2.2	Client Identifier	15
2.2.3	Shared Secret.....	15
2.3	Obtaining a credential	16
2.4	Logging in to the Portal	16
2.5	Account set up	18
2.5.1	Setting up a User Account	18
2.5.2	Creating a Business Account	21
2.5.3	Adding users to the Business Account.....	27
2.5.4	Assigning user roles and statuses.....	29
3.0	Using the Portal.....	33
3.1	Navigating the Portal.....	33
4.0	System Messages	35
4.1	Viewing System Messages	35
4.2	Navigating System Messages.....	36
5.0	Useful Links.....	37
5.1	Opening a Useful Link.....	37
5.2	Creating a Useful Link.....	40
5.3	Modifying a Useful Link.....	42
5.4	Deleting a Useful Link	43
6.0	Trade Documents	45
6.1	Types of Trade Documents created in the Portal	45
6.2	Navigating the Trade Documents tab	47
6.3	Creating a Trade Document – Highway Carriers	49
6.3.1	Creating a Trade Document - Highway Carriers.....	49



6.3.2	Creating a Combined Highway Document	52
6.3.3	Creating a Highway Cargo Document.....	56
6.3.4	Creating a Highway Conveyance Document.....	58
6.4	Draft Documents tab.....	66
6.4.1	Completing a Draft Trade Document.....	68
6.4.2	Customizing the Draft Documents List/Tab.....	70
6.5	Submitted Documents tab.....	72
6.5.1	Navigating the Submitted Documents tab.....	74
6.5.2	Checking the status of Submitted Trade Documents.....	79
6.5.3	Searching Submitted Trade Documents.....	84
6.5.4	Customizing the Submitted Documents List/Tab.....	86
6.6	Editing a Submitted Document.....	89
6.7	Cancelling a Submitted Document.....	94
6.8	Printing/Downloading.....	97
6.8.1	Printing/Downloading a Trade Document.....	97
6.8.2	Printing/Downloading a Lead Sheet.....	103
6.9	Secondary Notices.....	105
6.9.1	What are Secondary Notices?.....	105
6.9.2	Navigating the Secondary Notices Tab.....	105
6.9.3	Searching Secondary Notices.....	107
6.9.4	Customizing the Secondary Notices List/Tab.....	110
6.9.5	Deleting a Secondary Notice.....	113
7.0	Lookups.....	115
7.1	Types of Lookups.....	115
7.2	Creating a Lookup.....	118
7.2.1	Creating a Lookup from within the Lookups tab.....	118
7.2.2	Creating a Lookup when working in a Trade Document.....	119
7.2.3	Creating a Trade Document Lookup when submitting a Trade Document.....	122
7.3	Searching for and using a Lookup.....	124
7.3.1	Searching for Lookups Criteria.....	124
7.3.2	From the Lookups tab.....	125
7.3.3	Using a Lookup While Working in a Trade Document.....	127
7.3.4	Using a Trade Document Lookup to create a Trade Document.....	131
7.4	Editing a Lookup.....	133
7.5	Deleting a Lookup.....	136
8.0	Updating Profile Information.....	137
8.1	Updating User Account Profile Information.....	137



8.2	Deleting a User Account	139
9.0	Managing User Accounts	141
9.1	Editing an Account User Role	141
9.2	Suspending an Account User.....	144
9.3	Removing an Account User	146
10.0	Managing Business Accounts.....	148
10.1	Updating Business Account Information.....	148
10.1.1	Edit the Account Owner Information	148
10.1.2	Edit the Business Account Information	150
10.2	Setting a Default Business Account	153
10.3	Deleting a Business Account	154



Table of Figures

Figure 2-1 Getting set up in the Portal.....	14
Figure 2-2 eManifest Portal Terms and Conditions page	17
Figure 2-3 eManifest Portal (Create User Account) page	19
Figure 2-4 Create User Account page.....	19
Figure 2-5 User Account Created	20
Figure 2-6 User Account creation confirmation e-mail	21
Figure 2-7 eManifest Portal – Welcome page.....	21
Figure 2-8 Business Accounts – Create Business Account.....	22
Figure 2-9 Create Business Account – Step 1 of 3	22
Figure 2-10 Create Business Account – Step 2 of 3	23
Figure 2-11 Create Business Account – Step 3 of 3	24
Figure 2-12 Business Account Created page.....	25
Figure 2-13 Business Accounts page.....	26
Figure 2-14 Business Account confirmation e-mail	26
Figure 2-15 Business Account Tab.....	30
Figure 2-16 User Access tab	30
Figure 2-17 User Access tab – Add User page.....	31
Figure 2-18 User Access tab – Add User – Step 1 of 2	31
Figure 2-19 User Access tab – Add User – Step 2 of 2	32
Figure 3-1 Messages tab – System Messages and Useful Links	33
Figure 4-1 Messages tab – System Messages List.....	35
Figure 4-2 Messages tab – System Message.....	36
Figure 5-1 Messages tab – Useful Links section	38
Figure 5-2 Messages tab – Useful Links and new browser window.....	39
Figure 5-3 Messages tab – Useful Links section (Create Useful Link)	40
Figure 5-4 Messages tab – Create Useful Link page.....	41
Figure 5-5 Messages tab – Modify Useful Links	42
Figure 5-6 Messages tab – Modify Useful Link page	43
Figure 5-7 Messages tab – Edit Useful Link page.....	43
Figure 5-8 Messages tab – Delete Useful Link.....	44
Figure 6-1 Trade Documents tab.....	47
Figure 6-2 Trade Documents tab – Create Combined Highway Document.....	49
Figure 6-3 Trade Documents tab – Create Trade Document.....	52
Figure 6-4 Trade Documents tab – Create Trade Document (Combined Highway Document)	53
Figure 6-5 Trade Documents tab – Create Combined Highway Document (Cargo tab).....	54
Figure 6-6 Trade Documents tab – Submitted to the CBSA (Combined Highway Document).....	55
Figure 6-7 Trade Documents tab – Create Trade Document (Highway Cargo Document).....	56
Figure 6-8 Trade Documents tab – Create Highway Cargo Document (Cargo tab).....	57
Figure 6-9 Trade Documents tab – Submit to the CBSA (Highway Cargo Document).....	58
Figure 6-10 Trade Documents tab – Create Trade Document (Highway Conveyance Document)	59
Figure 6-11 Trade Documents tab – Create Highway Conveyance Document.....	60
Figure 6-12 Trade Documents tab – Enter Trailer Information.....	61
Figure 6-13 Trade Documents tab – Enter Trailer Information #01.....	62
Figure 6-14 Trade Documents tab – Select a CCN(s).....	63
Figure 6-15 Trade Documents tab – Highway Conveyance Document (Trailer tab).....	64
Figure 6-16 Trade Documents tab – Highway Conveyance Document (Submit to the CBSA)	65
Figure 6-17 Trade Documents tab – Draft Documents tab (Column Headings).....	66
Figure 6-18 Trade Documents tab – Draft Documents tab.....	68
Figure 6-19 Trade Documents tab – Combined Highway Document.....	69
Figure 6-20 Trade Documents tab – Draft Document – Customized List/Tab.....	70
Figure 6-21 Trade Documents tab – Draft Document – Save Customization	71
Figure 6-22 Trade Documents tab – Submitted Documents tab (Highway Conveyance Documents).....	74
Figure 6-23 Trade Documents tab – Submitted Documents tab (Highway Cargo Documents).....	75
Figure 6-24 Trade Documents tab – Status History (Highway Conveyance Document)	80



Figure 6-25 Trade Documents tab – Submitted Highway Conveyance Document (Status)	82
Figure 6-26 Section 12(1) Report	83
Figure 6-27 Trade Documents tab – Search Submitted Trade Documents	84
Figure 6-28 Trade Documents tab – Submitted Trade Documents Search Results	85
Figure 6-29 Trade Documents tab – Customize List View	87
Figure 6-30 Trade Documents tab – Submitted Highway Conveyance Document (Edit Document)	90
Figure 6-31 Trade Documents tab – Edit Submitted Highway Conveyance Document	91
Figure 6-32 Trade Documents tab – Edit Submitted Highway Conveyance Document (Select Reason for the Amendment).....	92
Figure 6-33 Trade Documents tab – Resubmitted to the CBSA.....	93
Figure 6-34 Trade Documents tab – Submitted Highway Conveyance Document (Cancel Submission).....	95
Figure 6-35 Trade Documents tab – Cancel Submission	96
Figure 6-36 Trade Documents tab – Submitted Documents tab.....	97
Figure 6-37 Trade Documents tab – Submitted Highway Conveyance Document.....	98
Figure 6-38 File Download.....	99
Figure 6-39 Highway Conveyance Document – Page 1.....	100
Figure 6-40 Highway Conveyance Document – Page 2.....	101
Figure 6-41 Highway Conveyance Document – Page 3.....	102
Figure 6-42 eManifest Portal Lead Sheet.....	104
Figure 6-43 Trade Documents tab – Secondary Notices tab.....	106
Figure 6-44 Trade Documents tab – Search Secondary Notices	108
Figure 6-45 Trade Documents tab – Search Secondary Notices Search Results – Manifest Forward	109
Figure 6-46 Trade Documents tab – Search Secondary Notices Search Results – Document Not on File notice	110
Figure 6-47 Secondary Notices Tab	111
Figure 6-48 Trade Document tab – Customize Secondary Notices	112
Figure 6-49 Trade Document tab – Secondary Notices	114
Figure 6-50 Trade Document tab – Delete Secondary Notice.....	114
Figure 7-1 Lookups tab	117
Figure 7-2 Lookups tab – Trailer tab (Create Trailer Lookup).....	118
Figure 7-3 Lookups tab – Create Trailer Lookup	119
Figure 7-4 Trade Documents tab – Addresses tab (Shipper section, Create a Shipper Lookup)	121
Figure 7-5 Trade Documents tab – Create a Lookup from a submitted Trade Document	123
Figure 7-6 Lookups tab – Search Consignee Lookups	125
Figure 7-7 Lookups tab – Consignee Lookup Search Results	126
Figure 7-8 Trade Documents tab – Create Combined Highway Document (Select Shipper Lookup)	128
Figure 7-9 Trade Documents tab – Shipper Lookup Search Results.....	129
Figure 7-10 Trade Documents tab – Shipper Information Populated by Selected Lookup	130
Figure 7-11 Use Trade Documents Lookup.....	131
Figure 7-12 Select Trade Documents Lookup	132
Figure 7-13 Use Trade Documents Lookup.....	133
Figure 7-14 Lookups tab – Tractor sub-tab	134
Figure 7-15 Lookups tab – Tractor Lookup Details.....	135
Figure 7-16 Lookups tab – Edit Tractor Lookup.....	135
Figure 7-17 Lookups tab – Tractor Lookup Details.....	136
Figure 7-18 Lookups tab – Delete Tractor Lookup.....	136
Figure 8-1 Updating Profile Information.....	137
Figure 8-2 My Profile - Edit.....	138
Figure 8-3 Edit My Profile – Edit Profile Information.....	139
Figure 8-4 Edit My Profile – Delete User Account	140
Figure 9-1 User Access tab – User Access (Account Users).....	141
Figure 9-2 User Access tab – User Details (Edit).....	142
Figure 9-3 User Access tab – Edit User Role.....	143
Figure 9-4 User Access tab – User Details (Modify)	144
Figure 9-5 User Access tab – Edit User Role and Status (Suspend)	145
Figure 9-6 User Access tab – Suspend User (User Role Suspended).....	145
Figure 9-7 User Access tab – User Details (Remove).....	146



<i>Figure 9-8 User Access tab – User Details (Remove User)</i>	147
<i>Figure 9-9 User Access tab – User Access (Account User Removed)</i>	147
<i>Figure 10-1 Business Accounts – Updating Business Account Information</i>	148
<i>Figure 10-2 Business Accounts – Account Owner Information tab</i>	149
<i>Figure 10-3 Business Accounts – Editing Account Owner Information</i>	150
<i>Figure 10-4 Business Accounts – Request Business Account Update</i>	151
<i>Figure 10-5 Business Accounts – Request Business Account Update</i>	152
<i>Figure 10-6 Business Accounts – Default log in Business Account</i>	153
<i>Figure 10-7 Business Accounts – Modifying a business account</i>	154
<i>Figure 10-8 Business Accounts – Deleting a business account</i>	155
<i>Figure 10-9 Business Accounts – Delete Business Account confirmation message</i>	155



1.0 Introduction

The eManifest Portal User Guide provides users of the Canada Border Services Agency's (CBSA) eManifest Portal with instructions for completing tasks in the eManifest Portal. This version of the Guide supports clients that will be transmitting their pre-arrival data electronically to the CBSA using the eManifest Portal. The term "Portal" is used as a short-form reference to the eManifest Portal.

The eManifest Portal is a secure data transmission option developed by the CBSA that allows the trade community to electronically transmit their pre-arrival data through the Internet.

For more information on eManifest and business requirements, including exemptions and exceptions, refer to the [eManifest section](#) of the CBSA Web site.

1.1 What is in this Guide?

This Guide is a reference tool for using the eManifest Portal. It includes step-by-step instructions for using key features of the Portal such as:

- navigating in the Portal;
- creating and managing User and Business Accounts;
- creating and managing Trade Documents;
- viewing and printing status information for Trade Documents; and
- creating and printing Lead Sheets to present at the border.



This Guide is not all-inclusive and should be used in conjunction with audience-specific documentation:

- Highway carriers should refer to the: [Electronic Commerce Client Requirements Document \(ECCRD\) – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#).
- Freight forwarders should refer to the: [Electronic Commerce Client Requirements Document \(ECCRD\) – Chapter 8: Advance Commercial Information \(ACI\)/eManifest Portal - House bills](#).

You will also need to read and understand the eManifest business rules and processes and the [requirements for your business type](#) whether you are a highway carrier, freight forwarder, broker or warehouse operator. Refer to the [eManifest Portal Help and Support](#) page of the CBSA Web site for additional help documentation.

1.2 Technical requirements

To access the Portal, you must have an Internet connection and one of the following Web browsers:

- Internet Explorer 8 and higher.
- Firefox 34 and above (recommended).

For more information about the technical requirements for using the Portal, highway carriers may refer to the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest](#)



[Highway Portal](#) and freight forwarders may refer to the [ECCRD – Chapter 8: Advance Commercial Information \(ACI\)/eManifest Portal - House bills](#) in the eManifest section of the CBSA Web site.

i	In order to use the eManifest Portal, each user is now required to ensure that JavaScript is enabled on their computer. This requirement comes as a result of the new eManifest Portal features which require JavaScript.
i	To avoid unexpected errors while logged in to the eManifest Portal do not use your Web browser's Back button. Use the navigation features provided within the Portal.
i	The Portal will log you out after 20 minutes of inactivity. To continue using the Portal, you will be required to log in again. To ensure no loss of information, you are strongly encouraged to save your work often.

1.3 Client support

The CBSA has established client support units to assist trade chain partners with the implementation of and compliance with eManifest. These units can be contacted by e-mail and/or telephone.


- The Border Information Service (BIS) is a telephone service that provides general information on most CBSA programs, including eManifest.
- The eManifest Helpdesk provides support by e-mail on eManifest policy and operational-related inquiries.
- The Technical Commercial Client Unit (TCCU) provides Electronic Data Interchange (EDI) and Portal technical support by e-mail and telephone for air, marine, highway and rail carriers, freight forwarders, importers, brokers and service providers.

Complete [contact information](#) is available in the eManifest section of the CBSA Web site.








1.4 Features used in this Guide

The legend below shows the features used in this Guide.

Feature	Description
	Important information or tip for the user.
Bold text	Within a list of task steps, this indicates a reference to an interactive object in the Portal, such as a command, and the names of data entry fields.
<i>Italic text</i>	Used to highlight the names of figures (e.g. screen images and other diagrams) as well as the titles of legislation such as the <i>Customs Act</i> .

1.5 Symbols used in the Portal

The following symbols are used throughout the Portal.

Symbols	Description
	This symbol indicates there is help available online. Select the icon to view the content of the field level help.
	This symbol indicates there is help available online. Select the icon to view help content of the screen level help.
	This symbol indicates that when you select the link, the information will be displayed in a new browser window.
	This may be displayed next to a Status. The  symbol is displayed if: <ol style="list-style-type: none">1. Change, an Amendment or a Cancellation made to a Trade Document was Rejected by the CBSA system. If a Change, Amendment or Cancel of a Trade Document is Rejected, the original version of your Submitted Document remains in the CBSA system until you resubmit a Change or Amendment and it is Accepted by the CBSA.2. Duplicate document number of the same document type has been submitted, In order to use the duplicate document data, a change to the document's number will need to be done and resubmitted.



1.6 Other reference information

For additional information on eManifest and the CBSA's advance reporting requirements for businesses, refer to the following:

- [eManifest section of the CBSA Web site](#)
For information on eManifest as well as links to related information.
- [eManifest Portal Help and Support page](#) of the CBSA Web site
For information on the eManifest Portal as well as links to related information.

For information on the requirements for electronic data transmission using the Portal refer to the Electronic Commerce Client Requirements Document (ECCRD).

- [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#) (for highway carriers).
- [ECCRD - Chapter 8: Advance Commercial Information \(ACI\)/eManifest Portal - House bills](#) (for freight forwarders).



2.0 Getting Started

2.1 Getting set up in the Portal

The following diagram provides an overview of the steps that both individuals and businesses must take to access the Portal. This multi-step process was developed by the CBSA to ensure the security and integrity of data in the Portal, in accordance with Government of Canada requirements.

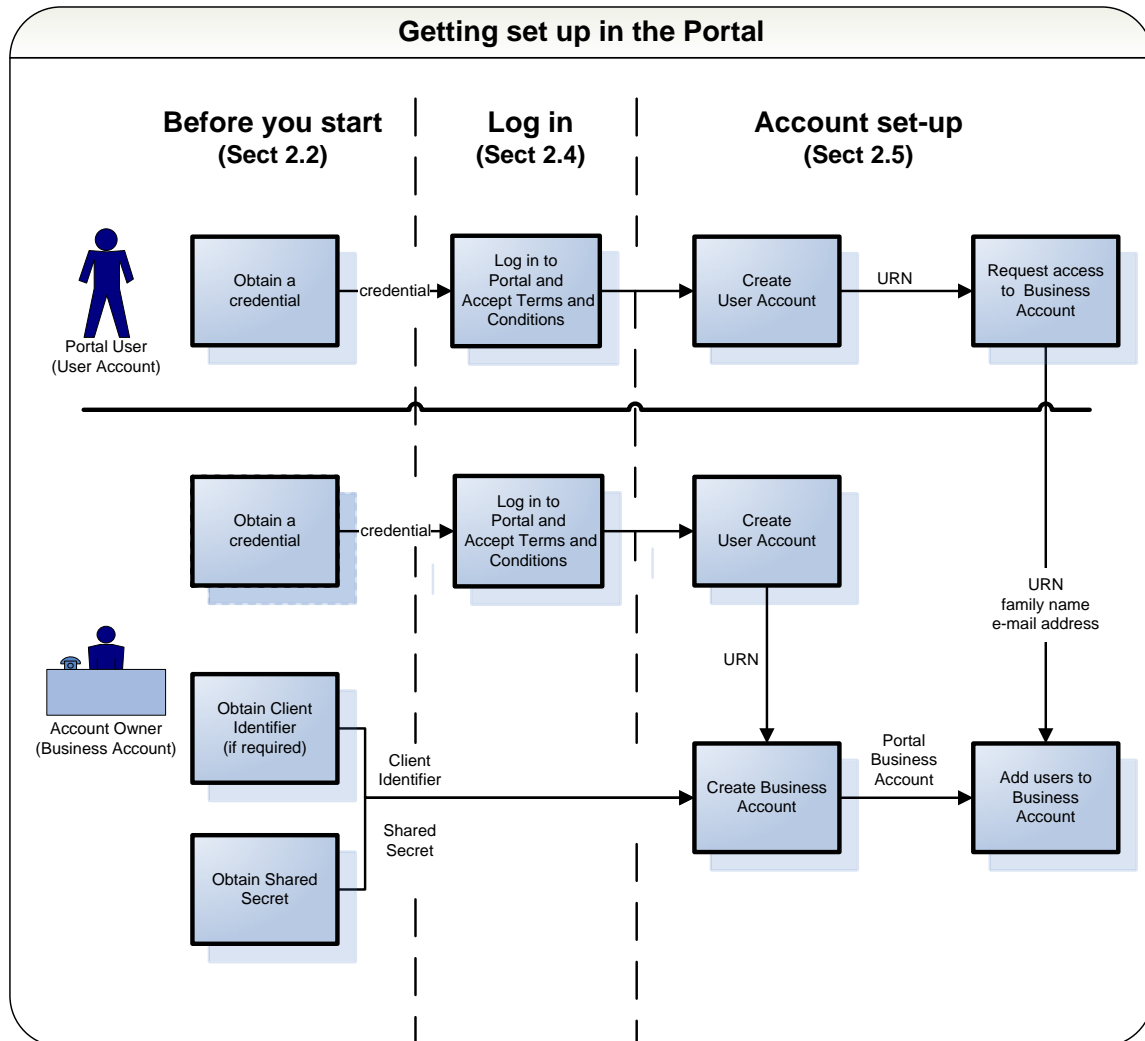


Figure 2-1 Getting set up in the Portal

There are two types of accounts in the Portal – the User Account and the Business Account. All Portal users must first obtain a credential and then create a Portal User Account. Only the authorized representative of your company, known as the Account Owner, can create a Portal Business Account.

Once both the User Account and Business Account have been established, the Account Owner or Proxy Account Owner can add users to the Business Account and assign each user a role



and a status. For a list of the tasks that each user role can perform in the Portal, see [section 2.5.3](#) of this Guide.

2.2 Before starting

The following chart summarizes what you need to do before you can create a Portal account.

Account Type	User	What You Need		
		Credential	Client Identifier	Shared Secret
User Account	All users	✓		
Business Account	Account Owner	✓	✓	✓

2.2.1 Credentials

In order to create an eManifest Portal User Account, all users must first obtain a credential that protects their communications with online government programs and services. There are two credential options: a commercial credential service (Sign-In Partner) and a government-issued credential service (GCKey). If you wish to find out more information about each credential option available please refer to the [Cyber Authentication Renewal Initiative Frequently Asked Questions](#) or the [eManifest Portal - Frequently Asked Questions \(FAQs\)](#) addressed to your company type.

To obtain a credential, see [section 2.3](#) of this Guide.

Before you start	You will need a valid e-mail address.
-------------------------	---------------------------------------

2.2.2 Client Identifier

If you are the authorized representative of your business, you must ensure that your business has a valid Client Identifier.

For additional information about client identifiers, please refer to the [eManifest section](#) of the CBSA Web site.

2.2.3 Shared Secret

A Shared Secret is a temporary access code that a business requires to create a Portal Business Account in the eManifest Portal. The CBSA issues it to businesses that request access to the Portal and must be used within 90 days of the issue date. The Shared Secret is used to authenticate and validate a client when creating an eManifest Portal Business Account. Only the CBSA and the authorized representative of the company have access to this information. For additional information, refer to the [eManifest section](#) of the CBSA Web site.



New companies

For new companies that must apply for both a client identifier and a Shared Secret, the application form includes a section that allows you to request both. For additional information, refer to the [Shared Secret page](#) on the CBSA Web site.

Existing companies

If you currently have a valid client identifier, you will not be required to re-apply using the client identifier application form to obtain your Shared Secret. Existing companies can apply for a Shared Secret by submitting a signed letter request to the CBSA on company letterhead. The letter must be signed by an authorized representative (someone with signing authority) who must be a company contact identified in the CBSA's client identifier records. For additional information, refer to the [eManifest section](#) of the CBSA Web site.

2.3 Obtaining a credential

As outlined in section 2.2, all users of the eManifest Portal are required to obtain a credential before they can access the Portal. A credential, in the information systems context, is an attestation of identity authentication that protects your communications with online government programs and services. The two credential options currently available are Sign-In Partner and GCKey.

For specific information on logging in to the eManifest Portal with either Sign-In Partner or GCKey, or to transfer credentials, please refer to the [eManifest Portal - Quick Reference Guide \(QRG\)](#).

2.4 Logging in to the Portal

This section outlines the steps to log in to the Portal.

Start at:	eManifest Portal Log In.
------------------	--

1. Select the credential option with which you would like to log in, either Sign-In Partner or GCKey.
2. Enter your credential information.
3. Review the eManifest Portal Terms and Conditions of Use (see *Figure 2-2*).



4. Select **I Accept**. You can now create your User Account. See [section 2.5.1](#) of this Guide.

Figure 2-2 eManifest Portal Terms and Conditions page

	Every time you log in to the Portal, you must accept the eManifest Portal Terms and Conditions to be able to continue.
	If you select I DO NOT Accept the eManifest Portal Terms and Conditions, you cannot continue and you will be asked if you want to log out.



2.5 Account set up


As shown in *Figure 2-1*, there are two types of Portal accounts that must be set up before you can enter data in Trade Documents:

User Account	A Portal User Account is a standard way for all users to establish their identity in the Portal. All users of the Portal must create an eManifest Portal User Account. A Business Account Owner can then associate your User Account to their Business Account and assign user roles and statuses.
Business Account	A Portal Business Account is an area in the eManifest Portal dedicated to individual companies to conduct secure data transmissions with the CBSA. Portal Business Accounts are managed by Account Owners who are authorized representatives of a company.

2.5.1 Setting up a User Account

This section outlines the steps for creating a Portal User Account.

The first time you log in to the Portal with your credential, and accept the Terms and Conditions, the eManifest Portal Welcome (Create User Account) page will be displayed (see *Figure 2-3*).

Start at:	eManifest Portal – Welcome (Create User Account) page.
	This page is displayed only when creating a User Account.



1. Select **Create User Account** (see *Figure 2-3*).

eManifest Portal Canada

Home eManifest Portal Help and Support (URN:) | Log out

Welcome

Before accessing the eManifest Portal, you must create a User Account **or** transfer an existing User Account which is associated with another credential.

Option 1 or **Option 2**

To create a new User Account, select the **Create New User Account** button below.

To transfer an existing User Account which is associated with a Sign-In Partner credential, select the **Transfer Sign-In Partner** button below.

Figure 2-3 eManifest Portal (Create User Account) page

2. Enter your profile information. All fields are mandatory unless otherwise indicated on the screen.
3. Select **Submit** (see *Figure 2-4*).

eManifest Portal Canada

Home > Create User Account eManifest Portal Help and Support (URN:) | Log out

Create User Account

Enter Profile Information

All fields are mandatory unless otherwise specified.

Note: Selecting a ? or ? icon displays related help information in a new browser window.

First Name:

Family Name:

E-mail Address:

Re-type E-mail Address:

Telephone Number:

Telephone Extension (optional):

Preferred Time Zone: -- Select Time Zone --





Preferred Language of Correspondence:

Figure 2-4 Create User Account page



4. Select **Continue** (see *Figure 2-5*).

Figure 2-5 User Account Created

	<p>Once you have created a Portal User Account you will be provided with a User Reference Number (URN). A URN is a system-generated number uniquely associated with a Portal User Account.</p>
	<p>An e-mail confirming that your User Account has been created will be sent to the e-mail address you provided when creating your User Account. The e-mail will contain the same information displayed on the User Account Created – Profile Information Saved page (see <i>Figure 2-5</i>).</p>
	<p>The User Account information in the e-mail should be saved for future reference (see <i>Figure 2-6</i>).</p>
	<p>If you are the authorized representative for your company, you may create a Business Account and register yourself as the Account Owner. If you are not the authorized representative, you must provide your URN, e-mail address and family name to the person who is the Account Owner so they can add you as a user to your company's Business Account.</p>

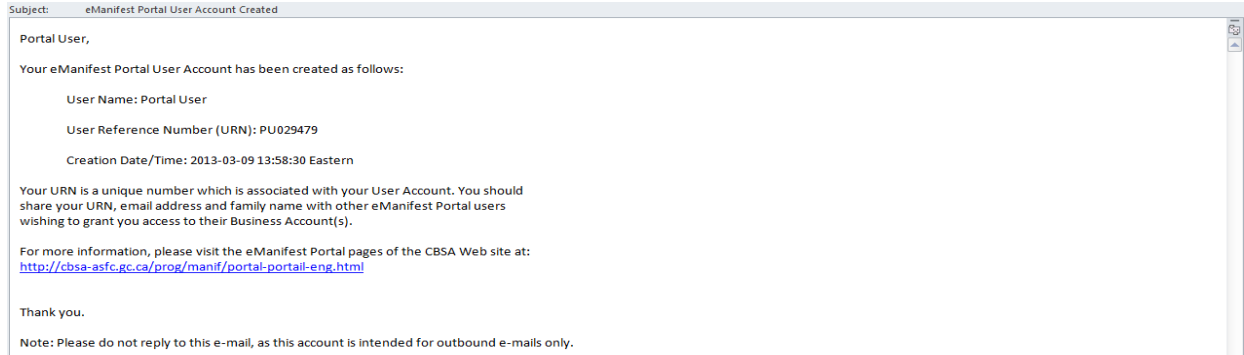



Figure 2-6 User Account creation confirmation e-mail

2.5.2 Creating a Business Account

This section outlines the steps for creating a Business Account in the Portal.

Before you start	<p>You will need:</p> <ul style="list-style-type: none"> • Client identifier (CBSA-issued); • CBSA-issued Shared Secret; and • Portal User Account.
	<p>If you are the authorized representative of your company, you may create your company's Business Account in the Portal. By creating your Business Account, you become the Account Owner. There is only one Account Owner for each Business Account. You may set up more than one Business Account if you represent more than one business. Each Business Account must have a unique client identifier and Shared Secret.</p>
Start at:	eManifest Portal – Welcome page (see <i>Figure 2-7</i>).

1. Select **Business Accounts** (see *Figure 2-7*).

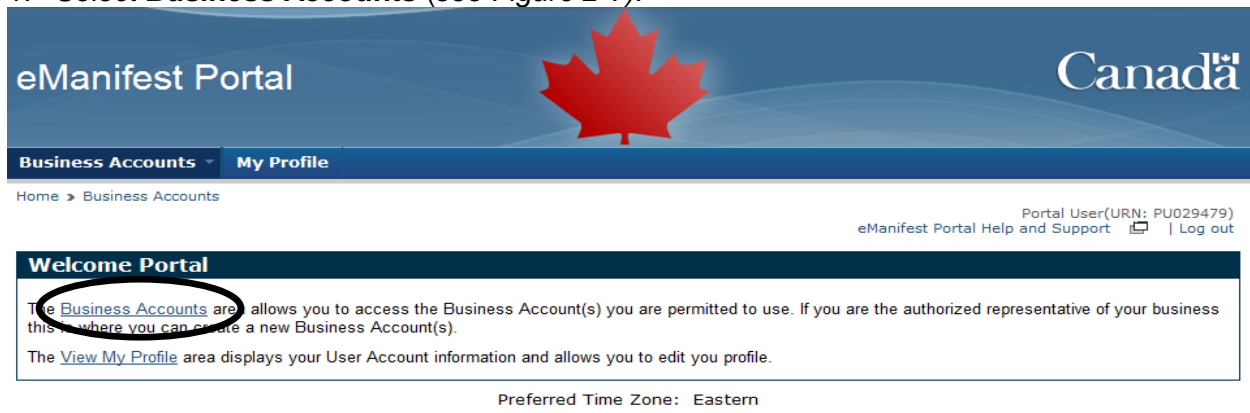


Figure 2-7 eManifest Portal – Welcome page



2. Select **Create Business Account** (see *Figure 2-8*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail reads 'Home > Business Accounts'. On the right, user information is displayed: 'Portal User(URN: PU029479)', 'eManifest Portal Help and Support', and a 'Log out' link. The main content area is titled 'Business Accounts' and contains a 'Create Business Account' button circled in red. Below the button, a message states 'No Business Accounts' and a table with the following structure:

Business Name	Client Identifier	Business Type	Role	Action
Business Accounts list is empty				

At the bottom of the page, it indicates 'Preferred Time Zone: Eastern'.

Figure 2-8 Business Accounts – Create Business Account

3. Enter your Client Identifier (e.g. carrier code), Business Type (e.g. carrier) and Shared Secret.
4. Select **Submit** (see *Figure 2-9*).

The screenshot shows the 'Create Business Account - Step 1 of 3' form. The title is 'Enter Business Information'. A message states: 'If you are the authorized representative of a business you may begin the process of creating a Business Account by providing the information below. All fields are mandatory.' The form contains three input fields: 'Client Identifier' (text box with a question mark icon), 'Business Type' (dropdown menu with '-- Select Business Type --'), and 'Shared Secret' (three text boxes with a question mark icon). Three arrows point to each of these fields. At the bottom, there are 'Submit' and 'Cancel' buttons, with the 'Submit' button circled in red. The page footer indicates 'Preferred Time Zone: Eastern'.

Figure 2-9 Create Business Account – Step 1 of 3

5. Enter all mandatory Account Owner Information. Optional fields are indicated on the page.



6. Select **Submit** (see *Figure 2-10*).

eManifest Portal Canada

Business Accounts > My Profile

Home > Business Accounts > Create Business Account Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Create Business Account - Step 2 of 3

Enter Account Owner Information

All fields are mandatory unless otherwise specified.

First Name: Portal
Family Name: User

Account Owner Information

Position Title: Owner
E-mail Address: cbsa@cbsa.gc.ca
Re-type E-mail Address: cbsa@cbsa.gc.ca
Telephone Number: 613-555-5555
Telephone Extension (optional):
Fax Number (optional):
Address: 123 Main St
City: Ottawa
Country: Canada
Province/State (Canada/USA locations only): Ontario
Postal/Zip Code (Canada/USA locations only): A1A 1A1

Submit Cancel

Preferred Time Zone: Eastern

Figure 2-10 Create Business Account – Step 2 of 3

7. Review the business information displayed (see *Figure 2-11*).



8. Select **Continue** (see *Figure 2-11*).

Figure 2-11 Create Business Account – Step 3 of 3

eManifest Portal **Canada**

Business Accounts | **My Profile**

Home > Business Accounts > Create Business Account Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Create Business Account - Step 3 of 3

Review Business Information

Business Name: **PORTAL 18**
Client Identifier: **5472**
Business Type: **Carrier**

Please review your existing business information below. If this information is incorrect you can change it by selecting **Request Update**. If the information is correct or you would like to change it at a later time select **Continue**.

Business Information

Contact First Name: **Portal**
Contact Family name: **User**
Contact Telephone Number: **1234567890**
Contact Telephone Extension:
Address | Telephone Number: **250 TREMBLAY RD**
City: **OTTAWA**
Province/State: **Ontario**
Postal/Zip Code: **K1A0L8**
Country: **Canada**

Preferred Time Zone: Eastern



If the business information displayed is incorrect, select **Request Update** and refer to [section 8.0](#) of this Guide for instructions on updating profile information.



9. Select **OK** (see *Figure 2-12*).

eManifest Portal Canada

Business Accounts > My Profile

Home > Business Accounts > Business Account Created Portal User[URN: PU029479]
[eManifest Portal Help and Support](#) | [Log out](#)

Business Account Created

Your Business Account has been created and is now active. An e-mail has been sent to the address you provided to confirm your Business Account creation.

Creation Date/Time: 2013-03-09 15:06

Account Owner Information First Name: Portal Family Name: User Position Title: Owner E-mail Address: portal_shared_secret-portal_secret_perage@cbse-asfc.gc.ca Telephone Number: 613-555-5555 Telephone Extension: - Fax Number: - Address: Ottawa, Ontario City: Ottawa Province/State: Ontario Postal/Zip Code: A1A 1A1 Country: Canada	Business Information Business Name: PORTAL 18 Client Identifier: 5472 Business Type: Carrier Contact First Name: Portal Contact Family name: User Contact Telephone Number: 1234567890 Contact Telephone Extension: - Address Telephone Number: 250 TREMBLAY RD City: OTTAWA Province/State: Ontario Postal/Zip Code: K1A0L8 Postal/Zip Code: Canada
--	---

[Print/Download Business Account Information \(PDF, 1018KB\)](#)

If you are the authorized representative of another business you can create an additional Business Account by selecting **Create Another Business Account**.

If you do not want to create another Business Account at this time, select **OK**.

OK

Preferred Time Zone: Eastern

Figure 2-12 Business Account Created page



10. The Business Accounts page is displayed with your Business Account name listed as well as your Client Identifier, Business Type and Role (see *Figure 2-13*).

Business Accounts 1 - 2 of 2

Business Name ▲	Client Identifier	Business Type	Role	Action
PORTAL 17	2471	Carrier	Account Owner	Modify
PORTAL 18	5472	Carrier	Account Owner	Modify

Preferred Time Zone: Eastern

Figure 2-13 Business Accounts page

	An e-mail will be sent to the Account Owner's e-mail address confirming that the Business Account was successfully created (see <i>Figure 2-14</i>).
	The Business Account information in the e-mail should be saved for future reference.

Subject: eManifest Portal Business Account Created

Portal User,

Your eManifest Portal Business Account has been created and is now active for the following business:

Business Name: PORTAL 18
 Client Code: 5472
 Business Type: Carrier

Creation Date/Time: 2013-03-09 15:06:00 Eastern

For more information, please visit the eManifest Portal pages of the CBSA Web site at: <http://cbsa-asfc.gc.ca/prog/manif/portal-portal-eng.html>

Thank You

Note: Please do not reply to this email, as this account is intended for outbound emails only.

Figure 2-14 Business Account confirmation e-mail



2.5.3 Adding users to the Business Account

As an Account Owner you are responsible for adding users to your Business Account and assigning user roles and statuses. These user roles and statuses define what the user can do in your Business Account.

The Account Owner has the option to delegate the responsibility of setting up and managing user access by assigning the Proxy Account Owner role to one or more users within the Business Account.

User roles in the Portal:

Account Owner	<p>An Account Owner is a user role in the Portal that has the unique ability to register and update the Business Account. The Account Owner has different access privileges depending on their business type. They are defined as follows:</p> <p>Highway carriers and freight forwarders can view, create and edit Trade Documents, Lookups and Useful Links; grant access and assign user roles to other users in the Portal; and view System Messages, Secondary Notices (Manifest Forwards, Document Not on File notices) , Lookups and Useful Links in its associated Business Account</p> <p>Brokers and warehouse operators can view System Messages, Secondary Notices (Manifest Forwards) , Lookups and Useful Links in its associated Business Account.</p>
Proxy Account Owner	<p>The Proxy Account Owner is a user granted privileges by an Account Owner.</p> <p>Highway carrier and freight forwarder Proxy Account Owners are granted the ability to view, create and edit Trade Documents, Lookups and Useful Links; grant access and assign user roles to Portal Users; and view System Messages, Secondary Notices (Manifest Forwards, Document Not on File notices), Lookups and Useful Links in the associated Business Account.</p> <p>Brokers and warehouse operators can view System Messages, Secondary Notices (Manifest Forwards), and Useful Links in its associated Business Account.</p>
Account User	<p>The Account User is a user granted privileges by an Account Owner or a Proxy Account Owner.</p> <p>Highway carrier and freight forwarder Account Users are granted the ability to view, create and edit Trade</p>



	<p>Documents, Lookups, Useful Links and view System Messages, Secondary Notices (Manifest Forwards, Document Not on File notices), Lookups and Useful Links in the associated Business Account.</p> <p>Brokers and warehouse operators can view System Messages, Secondary Notices (Manifest Forwards), and Useful Links in its associated Business Account.</p>
Account Browser	<p>The Account Browser is a user granted read-only access privilege by an Account Owner or Proxy Account Owner in the associated Business Account.</p> <p>Highway carrier and freight forwarder Account Browsers are granted the ability to view Trade Documents, Lookups, Useful Links, System Messages, Secondary Notices (Manifest Forwards, Document Not on File notices), and Useful Links in the associated Business Account.</p> <p>Brokers and warehouse operators can view System Messages, Secondary Notices (Manifest Forwards), and Useful Links in its associated Business Account.</p>

User statuses in the Portal:

Active	<p>An Active status gives the user the ability to benefit from the functionality they have been granted by the Account Owner or Proxy Account Owner of the Business Account.</p>
Suspended	<p>A Suspended status removes the user's ability to benefit from the functionality initially granted by the Account Owner or Proxy Account Owner of the Business Account.</p>



2.5.4 Assigning user roles and statuses

This section outlines the steps for assigning user roles and statuses.



Only an Account Owner or Proxy Account Owner can assign user roles or statuses.

Features by user role:

Features	Account Owner	Proxy Account Owner	Account User	Account Browser
Create/edit My Profile	✓	✓	✓	✓
Add/update a Business Account	✓			
Add/edit/suspend/remove a Proxy Account Owner	✓			
Add/edit/suspend/remove an Account User and an Account Browser	✓	✓		
Create/submit/edit/save a Trade Document	✓	✓	✓	
Search/view a Trade Document	✓	✓	✓	✓
Search /view a Secondary Notice	✓	✓	✓	✓
Delete a Secondary Notice	✓	✓	✓	
Print/download a Lead Sheet	✓	✓	✓	✓
Print /download a Section 12(1) Report	✓	✓	✓	✓
Create/edit/delete a Lookup	✓	✓	✓	
Search/view a Lookup	✓	✓	✓	✓
Create/edit/delete a Useful Link	✓	✓	✓	
View a Useful Link	✓	✓	✓	✓
View a System Message	✓	✓	✓	✓

User Role:

Before you start

You will need the user's URN, family name and e-mail address entered in their profile.

1. Select the **Business Account** from the Business Accounts top bar menu (see *Figure 2-15*).



eManifest Portal Canada

Business Accounts Profile

PORTAL 17 (2471)
PORTAL 18 (5472)

Portal User(URN: PU029479)
eManifest Portal help and Support | Log out

Business Accounts - Main page

Create Business Account

Default log in Business Account: none Save

Business Name	Client Identifier	Business Type	Role	Action
PORTAL 17	2471	Carrier	Account Owner	Modify
PORTAL 18	5472	Carrier	Account Owner	Modify

Preferred Time Zone: Eastern

Figure 2-15 Business Account Tab

2. Select **User Access** tab (see Figure 2-16).

eManifest Portal Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471)

Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups **User Access**

Messages

Messages 1 - 10 of 148

Subject	Published
Testing for Rollback	2013-04-04 13:26
Test 123	2013-04-03 14:24
How to Apply for a Shared Secret	2013-03-26 08:55
Client support	2013-03-26 08:51
Why you should use the eManifest Portal	2013-03-26 08:50
eManifest Portal Demonstrations.	2013-03-26 08:48
EDI Hotline	2013-03-26 08:47
Transmitting Accurate eManifest Cargo Data	2013-03-26 08:47
Canada Border Services Agency's eManifest requirements	2013-03-26 08:46
New After Hours Support Process	2013-03-26 08:44

Show Trade Document Shortcuts

Figure 2-16 User Access tab



3. Select **Add User** (see *Figure 2-17*).

The screenshot shows the eManifest Portal interface. At the top, there is a header with the eManifest Portal logo and the word 'Canada' next to a red maple leaf. Below the header, there are navigation tabs: 'Business Accounts' and 'My Profile'. The breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right side, there is a user profile section showing 'Portal User(URN: PU029479)' and links for 'eManifest Portal Help and Support' and 'Log out'. The main content area has a tabbed interface with 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'User Access' tab is active, and within it, the 'Add User' button is circled in red. Below the button is a search bar with the text '# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. A table below shows one user entry:

Family Name ▲	First Name	URN	User Role	User Status
User	Portal	PU029479	Account Owner	Active

At the bottom of the page, it says 'Preferred Time Zone: Eastern'.

Figure 2-17 User Access tab – Add User page

4. Enter the user's URN, last name and e-mail address (see *Figure 2-18*).
5. Select **Submit** (see *Figure 2-18*).

The screenshot shows the 'Add User - Step 1 of 2' form in the eManifest Portal. The header and navigation are the same as in Figure 2-17. The main content area shows the 'Add User - Step 1 of 2' form with the following fields:

- User Reference Number (URN): JD411833
- Last Name: Doe
- E-mail Address: JD@cbsa.gc.ca

At the bottom of the form, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is circled in red. Below the form, it says 'Preferred Time Zone: Eastern'.

Figure 2-18 User Access tab – Add User – Step 1 of 2

6. Review the user information displayed (see *Figure 2-19*).
7. Select a user role for the user.



8. Select **Submit** (see *Figure 2-19*).

eManifest Portal

Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471)

Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Add User - Step 2 of 2

All fields are mandatory.

User Reference Number (URN): **JD411833**

Last Name: **Doe**

First Name: **John james**

E-mail Address: **portal_shared_secret-portail_secret_partage@cbsa-asfc.gc.ca**

Select a user role for Doe, John james:

- Account Browser
- Account User**
- Proxy Account Owner

Submit Cancel

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 2-19 User Access tab – Add User – Step 2 of 2

9. A User Added message will appear to confirm that the user has been added.
10. Select **OK**.



To edit the User Status see section 9.1 of this guide.



3.0 Using the Portal

3.1 Navigating the Portal

The following are the standard information and navigation features that you will find on every Portal page. You will see this page after your User Account has been created and the Account Owner has added you to a Business Account (see *Figure 3-1*).

The screenshot shows the eManifest Portal interface. At the top, there is a header with the Government of Canada logo and navigation links. The main content area is divided into sections: Messages, Useful Links, and a footer with various service links. Numbered callouts (1-11) point to specific elements: 1 (Government of Canada logo), 2 (Home path), 3 (My Profile), 4 (Message subject), 5 (Message pagination), 6 (User Access), 7 (Help and Support), 8 (Logout), 9 (User ID), 10 (Terms and conditions), and 11 (Transparency link).

Messages

Messages 1 - 10 of 159

Subject	Published
Requirements for Commercial Clients	2013-05-07 14:37
Amendments to the Customs Act	2013-05-07 14:36
Implementing eManifest	2013-05-07 14:35
How to Apply for a Shared Secret	2013-05-07 14:33
Client support	2013-05-07 14:33
How to Apply for a Shared Secret	2013-05-07 14:32
Why you should use the eManifest Portal	2013-05-07 14:32
Transmitting Accurate eManifest Cargo Date	2013-05-07 14:31
New After Hours Support Process	2013-05-07 14:31
Error for missing shipper/consignee information	2013-05-07 14:31

Useful Links

Create Useful Link

Note: = indicates the link will open in a new browser window.

Links 1 - 2 of 2

Link Name	Action
Partners in Protection (PIPS)	Modify
Google	Modify

Preferred Time Zone: Eastern

Version: 2013-04-25


Terms and conditions | Transparency

About us | News | Contact us | Stay connected

HEALTH healthycanadians.gc.ca | TRAVEL travel.gc.ca | SERVICE CANADA servfoecanada.gc.ca | JOBS jobbank.gc.ca | ECONOMY actionplan.gc.ca | Canada.gc.ca

Figure 3-1 Messages tab – System Messages and Useful Links



Option		Description
1	CBSA Top and bottom Menu Bar	If you select any of the CBSA menu bar options you will be prompted to confirm that you want to close your Portal session before being taken to the selected web site.
2	Navigation Path	Provides links back to the previous pages that you navigated through in order to get to the current page. You can select any of the links in the path to go directly to that page.
3	Portal Top Bar	Provides access to your Business Accounts and to your profile information (My Profile).
4	Show Trade Document Shortcuts Sidebar	Allows you to show the sidebar and consists of a shortcut to create Trade Documents. The sidebar remains open until you select Hide Trade Document Shortcuts Sidebar .
	Hide Trade Document Shortcuts Sidebar	Allows you to hide the sidebar. The sidebar remains hidden until you select Show Trade Document Shortcuts Sidebar or until your next Portal session.
5		Provides access to help information for this screen.
6	Tabs	A navigation tool that allows you to quickly access a major area of functionality in the Portal, e.g. Trade Documents.
7	eManifest Portal Help and Support	Takes you to the eManifest Portal Help and Support page on the CBSA Web site to access Portal help information and documents. A new browser window will open when this link is selected.
8	Log out	Allows you to log out of the Portal and end your session.
9	Name and URN (User Reference Number)	Your name and URN. Your URN is a system-generated number that uniquely identifies you as a Portal user.
10	Terms and conditions	Takes you to the terms and conditions of the CBSA web site (previously Important notices).
11	Transparency	Takes you to the Proactive Disclosure on the CBSA Web site.



4.0 System Messages

When beginning your Portal session it will open by default to the **Messages** tab.

Under the **Messages** tab, you will see System Messages sent by the CBSA to Portal users of a Business Account. These messages include, for example, changes to regulations or policy and systems maintenance messages and are not related to the status of Trade Documents.

You can view, print and download System Messages.

4.1 Viewing System Messages

	If there are no System Messages, the following will be displayed: Message list is empty.
	Messages are listed in the order in which they are received, starting with most recent at the top.
Start at:	Messages tab for the selected Business Account (see <i>Figure 4-1</i>).

To view the body of a message, select the applicable link in the Subject column (see *Figure 4-1*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, user information is displayed: 'Portal User(URN: PU029479)', 'eManifest Portal Help and Support', and 'Log out'. The main content area has tabs for 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Messages' tab is active, showing a list of 10 messages. The list has columns for 'Subject' and 'Published'. The messages are as follows:

Subject	Published
How to Apply for a Shared Secret	2013-03-26 08:55
Client support	2013-03-26 08:51
Why you should use the eManifest Portal	2013-03-26 08:50
eManifest Portal Demonstrations.	2013-03-26 08:48
EDI Hotline	2013-03-26 08:47
Transmitting Accurate eManifest Cargo Data	2013-03-26 08:47
Canada Border Services Agency's eManifest requirements	2013-03-26 08:46
New After Hours Support Process	2013-03-26 08:44
Error for missing shipper/consignee information	2013-03-26 08:43
eManifest Highway Extended Informed Compliance	2013-03-26 08:42

Navigation links at the bottom of the list include '1 2 3 4 5 Next > >>'. A vertical 'Show Trade Document Shortcuts' button is on the right side of the list.

Figure 4-1 Messages tab – System Messages List



4.2 Navigating System Messages

The navigation options outlined below are available on all System Messages (see *Figure 4-2*).

	Option	Description
1	Previous Message	Select to view the previous message in the System Messages list.
2	Print/Download Message	Select to open the message as a PDF file and either print or save the message. The PDF file opens in a new browser window.
3	Back to Messages List	Select to return to the Messages tab.
4	Next Message	Select to view the next message in the System Messages list.

The screenshot displays the eManifest Portal interface. At the top, there is a header with the eManifest Portal logo, a red maple leaf, and the word "Canada". Below the header, there are navigation tabs for "Business Accounts" and "My Profile". The main content area shows a "System Message 1 of 149" with the subject "How to Apply for a Shared Secret" and a publication date of "2013-03-26 08:55". The message text describes a Shared Secret and provides contact information for the eManifest Help Desk. At the bottom of the message, there are four numbered navigation options: 1. Previous Message, 2. Print/Download Message (PDF, 862KB), 3. Back to Messages List, and 4. Next Message. A vertical sidebar on the right contains the text "Show Trade Document Shortcuts". At the bottom of the page, it says "Preferred Time Zone: Eastern".

Figure 4-2 Messages tab – System Message








5.0 Useful Links

Useful Links are similar to bookmarks or favourites in a Web browser. They can be created by users in a Business Account or by the CBSA.

Useful Links are found on the **Messages** tab of the Portal.

User-created Useful Links are displayed alphabetically.

5.1 Opening a Useful Link

	The links at the top of the list are created and maintained by the CBSA and cannot be modified or removed.
	Portal users can create a Useful Link.
	Once a Useful Link is created, all users in the selected Business Account can view and access the link.
	A maximum of 50 user-created links can be displayed per Business Account in addition to the links created by the CBSA.
	Once a Useful Link is selected, the associated Web site will open in a new browser window. Your Portal session remains active.

Start at:	Messages tab for the selected Business Account (see <i>Figure 5-1</i>).
------------------	---



1. From the Link Name column, select the link that you want to open (see *Figure 5-1*).

The screenshot shows the eManifest Portal interface. At the top, there is a header with the eManifest Portal logo and the Canadian flag. Below the header, there are navigation tabs for Business Accounts, My Profile, Messages, Trade Documents, Lookups, and User Access. The Messages tab is selected, and the Useful Links section is visible. The Useful Links section contains a table with the following data:

Link Name	Action
Canada Border Services Agency	-
Travel tips	-
Border wait times	-
Partners in Protection (PIPS)	Modify

Preferred Time Zone: Eastern

Figure 5-1 Messages tab – Useful Links section



2. The associated Web site will open in a new browser window.
3. Close the new browser window when you have finished viewing the information (see *Figure 5-2*).

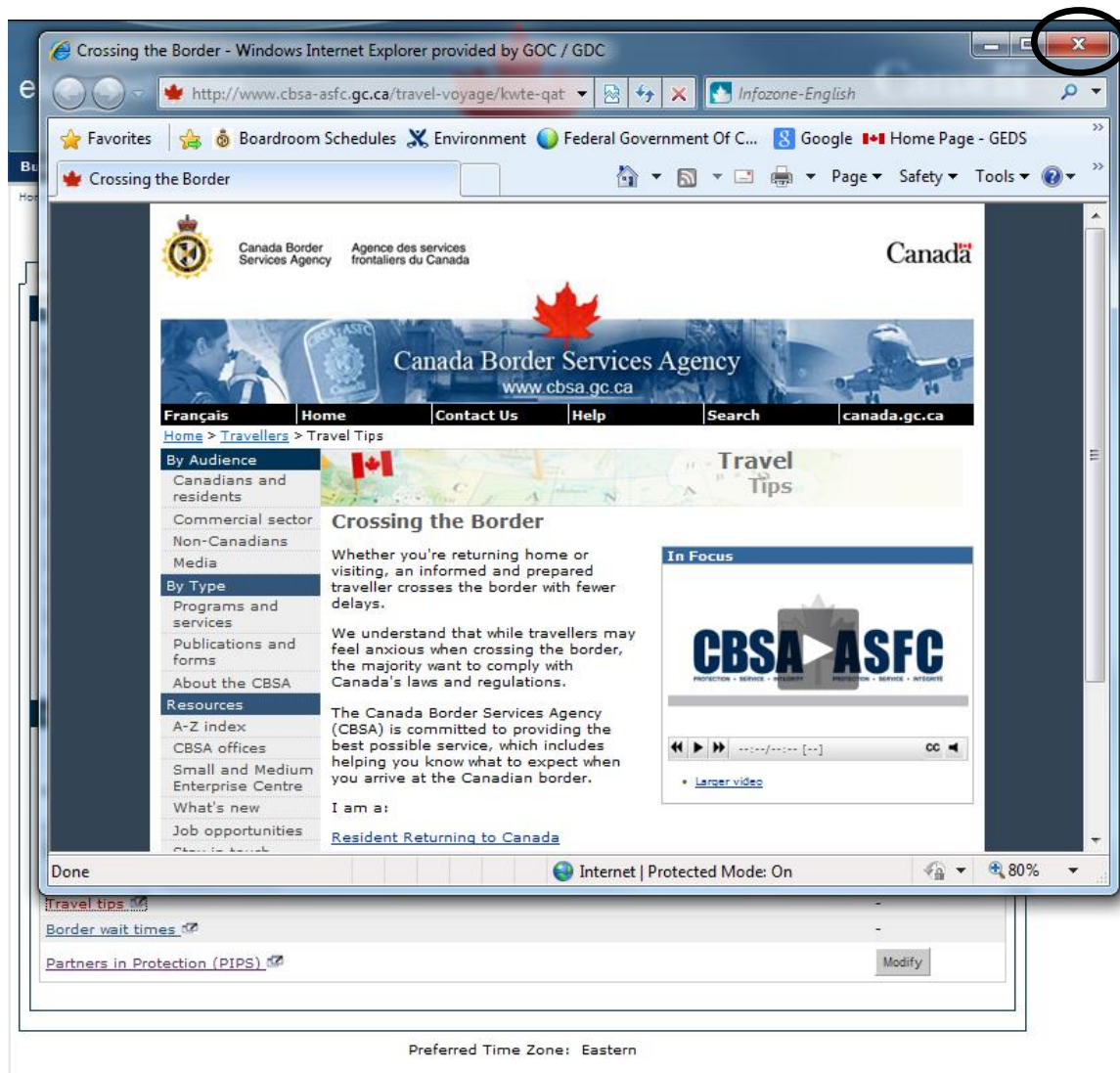


Figure 5-2 Messages tab – Useful Links and new browser window



5.2 Creating a Useful Link

This section outlines the steps for creating a Useful Link for your selected Business Account.



Once created, all users in the selected Business Account can view and access the link.

Start at:

Messages tab for the selected business account (see *Figure 5-3*).

1. Select **Create Useful Link** (see *Figure 5-3*).

The screenshot shows the eManifest Portal interface. At the top, there's a header with the eManifest Portal logo and the Canadian flag. Below the header, there are navigation tabs: Business Accounts, My Profile, Messages, Trade Documents, Lookups, and User Access. The 'Messages' tab is selected. Below the tabs, there's a breadcrumb trail: Home > Business Accounts > PORTAL 17 (2471). On the right, there's user information: Portal User(URN: PU029479), eManifest Portal Help and Support, and Log out.

The main content area is divided into two sections: 'Messages' and 'Useful Links'. The 'Messages' section shows a list of 10 messages with columns for Subject and Published. The 'Useful Links' section shows a list of 4 links with columns for Link Name and Action. A 'Create Useful Link' button is circled in red in the 'Useful Links' section. Below the button, there's a note: Note: [external link icon] = indicates the link will open in a new browser window.

Subject	Published
How to Apply for a Shared Secret	2013-03-26 08:55
Client support	2013-03-26 08:51
Why you should use the eManifest Portal	2013-03-26 08:50
eManifest Portal Demonstrations.	2013-03-26 08:48
EDI Hotline	2013-03-26 08:47
Transmitting Accurate eManifest Cargo Data	2013-03-26 08:47
Canada Border Services Agency's eManifest requirements	2013-03-26 08:46
New After Hours Support Process	2013-03-26 08:44
Error for missing shipper/consignee information	2013-03-26 08:43
eManifest Highway Extended Informed Compliance	2013-03-26 08:42

Link Name	Action
Canda Border Services Agency	-
Travel tips	-
Border wait times	-
Partners in Protection (PIPS)	Modify

Preferred Time Zone: Eastern

Figure 5-3 Messages tab – Useful Links section (Create Useful Link)



2. In the **Link Name** field, enter a name for the link that you want displayed in the Portal.
3. In the **Address** field, enter or copy and paste the URL (Web site address) that you want to be associated with the link name.
4. Select **Create** (see *Figure 5-4*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages Trade Documents Lookups User Access

Create Useful Link ?

All fields are mandatory.

Link Name:

Address:

Preferred Time Zone: Eastern

Figure 5-4 Messages tab – Create Useful Link page

5. The Useful Link Created page is displayed, confirming that the link has been created.
6. Select **OK**. The **Messages** tab is displayed and the new Useful Link will now be visible on the list of Useful Links.



5.3 Modifying a Useful Link

This section outlines the steps for modifying an existing Useful Link for your selected Business Account.

Start at: Useful Links section on the **Messages** tab for the selected Business Account.

1. Under the Action column, select **Modify** for the link that you want to change (see *Figure 5-5*).

The screenshot shows the eManifest Portal interface. At the top, there is a header with the eManifest Portal logo and the Canadian flag. Below the header, there are navigation tabs: Business Accounts, My Profile, Messages, Trade Documents, Lookups, and User Access. The Messages tab is selected, and the Messages section is displayed. Below the Messages section, there is a 'Useful Links' section. A 'Create Useful Link' button is visible. A note indicates that a small icon next to a link name means it will open in a new browser window. Below the note, there is a table of Useful Links. The table has two columns: 'Link Name' and 'Action'. The links listed are 'Canada Border Services Agency', 'Travel tips', 'Border wait times', and 'Partners in Protection (PIPS)'. The 'Action' column for the 'Partners in Protection (PIPS)' link has a 'Modify' button circled in red.

Link Name	Action
Canada Border Services Agency	-
Travel tips	-
Border wait times	-
Partners in Protection (PIPS)	Modify

Preferred Time Zone: Eastern

Figure 5-5 Messages tab – Modify Useful Links

2. The Modify Useful Link page is displayed (see *Figure 5-6*).
3. Select **Edit**.



Figure 5-6 Messages tab – Modify Useful Link page

4. The Edit Useful Link page is displayed (see Figure 5-6).
5. Make the changes to the Link Name and/or Address fields, as required.
6. Select **Save** (see Figure 5-7).
7. The Useful Link Updated page is displayed, confirming that the link has been updated.



Figure 5-7 Messages tab – Edit Useful Link page

8. Select **OK**. The **Messages** tab for the selected Business Account is displayed.

5.4 Deleting a Useful Link

This section outlines the steps for deleting an existing Useful Link.

Start at:	Useful Links section of the Messages tab.
------------------	--

1. Under the Action column, select **Modify** for the link that you want to delete (see Figure 5-3). The Modify Useful Link page is displayed (see Figure 5-8).
2. Select **Delete** (see Figure 5-8).



eManifest Portal

Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471)

Portal User (URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Modify Useful Link ?

Link Name: Google
Address: <http://www.google.ca>

Yes Delete... < Back

Preferred Time Zone: Eastern

Version: 2013-04-25

Terms and conditions | Transparency

About us News Contact us Stay connected

HEALTH healthycanadians.gc.ca TRAVEL travel.gc.ca SERVICE CANADA servicecanada.gc.ca JOBS jobbank.gc.ca ECONOMY actionplan.gc.ca

Canada.gc.ca

Show Trade Document Shortcuts

Figure 5-8 Messages tab – Delete Useful Link

3. The Delete Useful Link page is displayed.
4. Confirm that you want to delete the link by selecting **Yes**. The **Messages** tab for the selected Business Account is displayed.



6.0 Trade Documents

Highway carriers:

Highway carriers using the Portal to transmit pre-arrival data to the CBSA will complete and submit Trade Documents (Highway Cargo Documents, Highway Conveyance Documents and Combined Highway Documents).

This section of the user guide outlines the steps for creating, submitting, editing, and cancelling your Trade Documents.

Freight forwarders:

Freight forwarders using the Portal to transmit pre-arrival data to the CBSA will complete and submit Trade Documents (House bills and Close Messages).





Although this section of the user guide only outlines the steps for creating, submitting and editing Trade Documents used by carriers, it can be useful in assisting with the creation, submission and edits of Trade Documents used by Freight Forwarders.

6.1 Types of Trade Documents created in the Portal

The three different Trade Documents used by highway carriers in the Portal are:

Highway Cargo Document	A Highway Cargo Document represents the initial record of a shipment that will arrive in Canada and enables the CBSA to control the movement of imported goods. This type of document is also known as a Cargo Control Document (CCD) and is identified by a Cargo Control Number (CCN).
Highway Conveyance Document	A Highway Conveyance Document provides information about the vehicle being used to transport goods entering Canada. This document is identified by a Conveyance Reference Number (CRN).
Combined Highway Document	A Combined Highway Document merges a Highway Cargo Document and a Highway Conveyance Document into a single document for easier data entry. However, once submitted through the Portal, the Combined Highway Document is split into one Highway Conveyance (identified by a CRN) and one Highway Cargo Document (identified by a CCN) by the CBSA's system for processing as separate Trade Documents. Note: If you wish to check the status of your Combined Highway Document you must check the Highway Cargo and Highway Conveyance Document statuses separately.



	A Combined Highway Document can only be used if there is one CRN, one CCN (one consignee and one shipper) and cargo is located either in the Tractor, Trailer or Container. If there is a Container on a Trailer, both the Trailer and Container information must be provided. Anything other than this combination requires the user to submit separate Highway Cargo and Highway Conveyance Documents.
	Your submitted Highway Cargo Documents must be accepted by the CBSA prior to your submission of a Highway Conveyance Document (unless it is an empty conveyance or only carrying goods qualifying as an exception). Failure to do so will lead to a rejection of your Highway Conveyance Document by the CBSA.
	Mandatory Fields: These fields must be completed prior to submitting your Trade Document to the CBSA.
	Trade Documents must be received and validated by the CBSA at least one hour prior to arrival at the First Canadian Port of Arrival (FPOA).

For a complete description of the data elements and the business rules for Trade Documents, highway carriers may refer to the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#) and freight forwarders may refer to the [ECCRD – Chapter 8: Advance Commercial Information \(ACI\)/eManifest Portal - House bills](#).



6.2 Navigating the Trade Documents tab

The navigation options outlined below are available when working in the Trade Documents tab (see *Figure 6-1*).

Refer to individual sections within this Guide for details on each option.

Home > Business Accounts > PORTAL 18 (5472) Test User(URN: TU041568)
 eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups

Trade Document ?

1 Create Trade Document 2 Search Submitted Trade Documents 6

Submitted Documents Draft Documents Secondary Notices

3 4 5

Filter Submitted Documents list to view the following: All Current Highway Conveyance Document Refresh

Note: An Status Warning icon will be displayed if an update to an existing version of a Trade Document has been rejected by the CBSA.

Documents 1 - 3 of 3

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Status
5472SO976Y51ATPOE2	2016-08-17 23:59 Eastern	1	2016-08-17 11:44	Accepted
5472CRNTESTCOMPLETE	2016-08-06 10:00 Eastern	1	2016-08-05 12:50	Accepted
5472CRNHHELDTEST120160805	2016-08-06 10:00 Eastern	1	2016-08-05 11:40	Accepted

Customize List/Tab

Preferred Time Zone: Eastern

Figure 6-1 Trade Documents tab

Option	Description
1	Create Trade Document
2	Search Submitted Trade Documents
3	Submitted Documents



Allows highway carriers to create a Highway Cargo, Highway Conveyance or Combined Highway Document. See [section 6.3](#) of this Guide.

Allows you to search for a previously submitted Trade Document. See [section 6.5.3](#) of this Guide.

Provides you with a list of Trade Documents that have been sent using the Portal to the CBSA. This list also includes data transmitted using Electronic Data Interchange (EDI). See [section 6.5](#) of this Guide.



4	Draft Documents	Provides you with a list of all Trade Documents that have been partially completed and not yet submitted to the CBSA. See section 6.4 of this Guide.
5	Secondary Notices	Provides you with a list of House bill Manifest Forwards that have been sent to you by a Trade Chain Partner. See section 6.9 of this Guide.
6	Trade Documents Shortcuts	Provides you with a list of shortcuts to creating any type of Trade Document available to the user. See section 6.3 of this Guide.

	You can browse or scroll through the lists of documents under the Draft Documents, Submitted Documents and Secondary Notices tabs. If a list cannot be presented on one page, you can navigate to the next, or previous page, by selecting the Previous, 1 2... or Next option.
	All lists can be sorted (in ascending or descending order) by selecting the Saved Date/Time, Status Date/Time or Notice Date/Time column headings (see section 6.5.4).



6.3 Creating a Trade Document – Highway Carriers

This section outlines the information within the Trade Documents tab and how to navigate within the tab to create different types of Trade Documents.



It is not recommended to have multiple users editing the same Trade Document.

6.3.1 Creating a Trade Document - Highway Carriers

The following are the required data elements and navigation features within the Trade Documents tab when creating Trade Documents (see *Figure 6-2*).

The screenshot shows the 'Create Combined Highway Document' form in the eManifest Portal. The form is titled 'Create Combined Highway Document' and includes the following elements:

- Carrier Information:** Carrier Name: PORTAL 17, Carrier Code: 2471.
- Mandatory Fields:** Conveyance Reference Number (CRN): 2471 PORTALUSER1 (1), Cargo Control Number (CCN): 2471 PORTALUSER2 (2).
- Navigation:** Tabs for General, Ports, Tractor, Trailer, Addresses, and Cargo (3).
- Shipper Section (4):** Includes a 'Select a Shipper Lookup' button (5) and fields for Name, Address Line 1, Address Line 2 (optional), Address Line 3 (optional), City, Country, Province/State, and Postal/Zip Code. Contact information (optional) includes First Name, Family Name, and Telephone Number. A 'Create a Shipper Lookup' button (6) is also present.
- Consignee Section (4):** Includes 'Notify Party (mandatory if available)' and 'Delivery Address (Mandatory if Delivery Address is different than Consignee Address)'.
- Buttons:** Check for Errors (7), Save and Continue (8), Save and Finish Later (9), Submit to the CBSA (10), Print/Download Document (PDF, 200KB) (11), and Cancel (12).

Figure 6-2 Trade Documents tab – Create Combined Highway Document



Trade Documents tab – Create Trade Document header elements		
Document type		Description of information required
1	Combined Highway Document and Highway Conveyance Document	Conveyance Reference Number (CRN)
2	Combined Highway Document and Highway Cargo Document	Cargo Control Number (CCN)

Trade Documents tab – Create Trade Document primary tabs		
3	General	These are the primary tabs containing required data necessary for creating Trade Documents.
	Ports	
	Tractor	
	Trailer	
	Addresses	
	Cargo	

Addresses tab – Fields		
4	Shipper	These Addresses tab fields contain required data.
	Consignee	
	Notify Party	
	Delivery Address	

Trade Documents tab – Create Trade Document – Shipper field		
Function/Navigation		Description
5	Select a Shipper Lookup	Search for and select a previously saved Shipper Lookup. The Select Lookup function is also available in other areas of the Portal. See section 7.0 of this Guide for details.
6	Create a Shipper Lookup	Create the shipper data entered as a Lookup for future use. The Create Lookup function is available in other areas of the Portal. See section 7.0 of this Guide for details.



A **Lookup** is a feature of the Portal designed to save time by allowing users to create and store frequently used data for reuse. This can be done for Trailer, Tractor, Shipper, Consignee, Notify Party, Delivery Address and Trade Document. See [section 7.0](#) of this Guide.

Trade Documents tab – Create Trade Document footer elements	
Function/Navigation	Description
7	Check for Errors Checks your document for input errors such as no data in mandatory fields or invalid characters entered. Note: The entire Trade Document is checked for input errors, not just the tab that you are working on. Note: The Check for Errors feature will run automatically when you select Submit to the CBSA .
8	Cancel Cancels the creation of the Trade Document. You will be asked to confirm the cancellation. Note: No data is saved when you cancel.
9	Save and Finish Later Saves a version of the Trade Document you are creating for future use. You will receive a message confirming that your document has been saved as a draft. Note: To access the saved version of the Trade Document, navigate to the Draft Documents tab.
10	Submit to the CBSA Transmits your Trade Document to the CBSA. The document is automatically checked for input errors. All errors must be corrected before the document can be transmitted.
11	Save and Continue Saves a version of the Trade Document you are creating without navigating away from the Trade Document. The name of the document will be the CCN for a Highway Cargo Document or the CRN for a Highway Conveyance Document. For a Combined Highway Document, the document name will be the CCN.
12	Print/Download Document Access a PDF version of your Trade Document. You can then print the document and/or save it in your business' records maintenance system. Note: The PDF document will open in a new browser window.



6.3.2 Creating a Combined Highway Document

This section outlines the steps for creating and submitting a Combined Highway Document to the CBSA.

	If you choose to submit a Combined Highway Document, please ensure that the CRN and CCN that you enter are different. If the numbers are identical this will generate an error message when submitting the Combined Highway Document.
	Maximum number of drafts: The Portal will store a maximum of 100 Draft Trade Documents per Business Account. You will see a note on the Draft Documents page telling you how many more Draft Documents you can create and store. If the system indicates you have no more room, you must delete a Draft Document before you can begin to create a new one.
Start at:	Trade Documents tab.

1. Select **Create Trade Document** (see *Figure 6-3*).

The screenshot shows the 'Trade Documents' tab in the eManifest Portal. At the top, there are navigation tabs for 'Messages', 'Trade Documents', and 'Lookups'. The 'Trade Documents' tab is active, and the 'Create Trade Document' button is highlighted with a red circle. Below this, there are sub-tabs for 'Submitted Documents', 'Draft Documents', and 'Secondary Notices'. The 'Submitted Documents' sub-tab is selected, showing a filter for 'Submitted Documents list to view the following: All | Current | Highway Conveyance Document'. A table of submitted documents is displayed with the following data:

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Status
5472SO976Y51ATPOE2	2016-08-17 23:59 Eastern	1	2016-08-17 11:44	Accepted
5472CRNTESTCOMPLETE	2016-08-06 10:00 Eastern	1	2016-08-05 12:50	Accepted
5472CRNHELDTEST120160805	2016-08-06 10:00 Eastern	1	2016-08-05 11:40	Accepted

At the bottom of the page, it indicates 'Preferred Time Zone: Eastern'.

Figure 6-3 Trade Documents tab – Create Trade Document



2. From the selection box, select **Combined Highway Document** (see *Figure 6-4*).
3. Select **Submit** (see *Figure 6-4*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Create Trade Document

Note: You have space to save 100 Draft Trade Documents for this Business Account. ⓘ

Select the type of Trade Document you want to create:

- Highway Conveyance Document ⓘ
- Highway Cargo Document
- Combined Highway Document**
- Use Trade Document Lookup

Submit Cancel

Preferred Time Zone: Eastern

Figure 6-4 Trade Documents tab – Create Trade Document (Combined Highway Document)



Another path to creating a Trade Document is as follows: starting from any of the main tabs (Messages, Trade Documents, Lookups or User Access), select the “Show Trade Document Shortcuts” side bar and select **Create Combined Highway Document** (see *Figure 6-1, item 6*).

4. Complete all tabs (General, Ports, Tractor, Trailer, Addresses, and Cargo) and mandatory fields (see *Figure 6-5*).



If you have additional cargo being transported under one CCN (one consignee and one shipper), select **Enter Cargo Information**.



5. Select **Submit to the CBSA** (see *Figure 6-5*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Create Combined Highway Document

Carrier Name: **PORTAL 17**
Carrier Code: **2471**

All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): **2471**

Cargo Control Number (CCN): **2471**

Complete all mandatory fields within the tabs below.

General Ports Tractor Trailer Addresses **Cargo**

Total Cargo Weight: -- Select Unit of Measure --

Cargo

Note: You may enter up to 999 cargo.

No Cargo

Number	Cargo Quantity	Cargo Description	Edit	Delete
Cargo list is empty				

Special Instructions (mandatory if available):

General Ports Tractor Trailer Addresses **Cargo**

Complete all mandatory fields within the tabs above.

[Print/Download Document \(PDF, 2000KB\)](#)

Preferred Time Zone: Eastern

Figure 6-5 Trade Documents tab – Create Combined Highway Document (Cargo tab)

6. If no errors are detected, a submission confirmation message will appear. Select **Yes** to continue or **No** to cancel the Trade Document submission.
7. If **Yes** was selected, a **Submitted to the CBSA** message will be displayed under the **Trade Documents** tab confirming the Combined Highway Document was successfully submitted.
8. Select **OK** (see *Figure 6-6*).



Messages | Trade Documents | Lookups | User Access

Submitted to the CBSA

Your Combined Highway Document has been submitted to the CBSA as separate Highway Conveyance and Highway Cargo Documents.

Conveyance Reference Number (CRN): **2471123456789** ←

Cargo Control Number (CCN): **2471987654321**

Submitted Date/Time: **2013-03-26 08:15**

Note: An optional Lead Sheet is provided to you from the CBSA. You can access this Lead Sheet by selecting the [Print/Download Lead Sheet](#) below. You must present either the eManifest Portal Lead Sheet or your own bar-coded document to the Border Services Officer upon arrival in Canada.

[Print/Download Lead Sheet \(PDF, 885KB\)](#)

[Print/Download Conveyance Document \(PDF, 3167KB\)](#)

[Print/Download Cargo Document \(PDF, 1905KB\)](#)

▶ [Use submitted Combined Highway Document information to create Trade Document lookup](#)

Preferred Time Zone: Eastern

Figure 6-6 Trade Documents tab – Submitted to the CBSA (Combined Highway Document)



You can print or download the Lead Sheet, the Conveyance Document and/or the Cargo Document by selecting the associated link (see [section 6.8](#) of this Guide).

You can also choose to select the option **Use submitted Combined Highway Document information to create Trade Document Lookup** for which you need to provide a Lookup name (see [section 7.2.3](#) of this Guide).



6.3.3 Creating a Highway Cargo Document

This section outlines the steps for creating and submitting a Highway Cargo Document to the CBSA.

i	Order of submission: All Highway Cargo Documents must be submitted to and accepted by the CBSA before submitting the Highway Conveyance Document to which the cargo will link. Failure to do so will lead to a rejection of your Highway Conveyance Document by the CBSA.
i	The cargo will not link if your Highway Conveyance Document is an empty conveyance or only carrying goods qualifying as an exception.
i	If a Highway Cargo Document is created using a previously submitted CCN, the system will reject the Trade Document as a duplicate. The document will then be available on the Submitted list. Users can only resubmit the document to the CBSA once they have modified the CCN.
Start at:	Trade Documents tab.

1. Select **Create Trade Document** (see *Figure 6-3*).
2. From the selection box, select **Highway Cargo Document** (see *Figure 6-7*).
3. Select **Submit** (see *Figure 6-7*).



Figure 6-7 Trade Documents tab – Create Trade Document (Highway Cargo Document)

i	Another path to creating a Trade Document is as follows: starting from any of the main tabs (Messages, Trade Documents, Lookups or User Access),
---	--



select the “Show Trade Document Shortcuts” side bar and select “Create Highway Cargo Document” (see *Figure 6-1, item 6*).

4. Complete all tabs (General, Ports, Addresses, Cargo) and mandatory fields (see *Figure 6-8*).
5. Select **Submit to the CBSA** (see *Figure 6-8*).

eManifest Portal Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages Trade Documents Lookups User Access

Create Highway Cargo Document

Carrier Name: **PORTAL 17**
Carrier Code: **2471**

All fields are mandatory unless otherwise specified.

Cargo Control Number (CCN): **2471**

Complete all mandatory fields within the tabs below.

General Ports Addresses **Cargo**

Total Cargo Weight: -- Select Unit of Measure --

Cargo

Note: You may enter up to 999 cargo.

No Cargo

Number	Cargo Quantity	Cargo Description	Edit	Delete
Cargo list is empty				

Special Instructions (mandatory if available):

General Ports Addresses **Cargo**

Complete all mandatory fields within the tabs above.

[Print/Download Document \(PDF, 966KB\)](#)

Preferred Time Zone: Eastern

Figure 6-8 Trade Documents tab – Create Highway Cargo Document (Cargo tab)

6. If no errors are detected, a submission confirmation will appear. Select **Yes** to continue or **No** to cancel the Trade Document submission.
7. If **Yes** was selected, a **Submitted to the CBSA** message will be displayed under the **Trade Documents** tab confirming the Highway Cargo Document was successfully submitted (see *Figure 6-9*).



8. Select **OK** (see *Figure 6-9*).

Figure 6-9 Trade Documents tab – Submit to the CBSA (Highway Cargo Document)

	<p>You can print or download the Highway Cargo Document by selecting the associated link (see section 6.8.1 of this Guide).</p> <p>You can also choose to select the option Use submitted Highway Cargo Document information to create Trade Document Lookup for which you need to provide a Lookup name (see section 7.2.3 of this Guide).</p>
--	--

6.3.4 Creating a Highway Conveyance Document

This section outlines the steps for creating, adding Cargo and submitting a Highway Conveyance Document to the CBSA.

	<p>If a Highway Conveyance Document is created using a previously submitted CRN, the system will reject the Trade Document as a duplicate. The document will then be available on the Submitted list and only once the users have modified the CRN can they resubmit the document to the CBSA.</p>
--	--

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select **Create Trade Document** (see *Figure 6-3*).
2. From the selection box, select **Highway Conveyance Document** (see *Figure 6-10*).



3. Select **Submit** (see *Figure 6-10*).

The screenshot shows the 'Create Trade Document' form in the eManifest Portal. The 'Trade Documents' tab is selected. A dropdown menu is open, showing the following options: 'Highway Conveyance Document' (highlighted), 'Highway Cargo Document', 'Combined Highway Document', and 'Use Trade Document Lookup'. The 'Submit' button is circled. The page header includes 'eManifest Portal', 'Canada', and 'Business Accounts My Profile'. The breadcrumb trail is 'Home > Business Accounts > PORTAL 17 (2471)'. The user information is 'Portal User(URN: PU029479)'. The page footer shows 'Preferred Time Zone: Eastern'.

Figure 6-10 Trade Documents tab – Create Trade Document (Highway Conveyance Document)

	Another path to creating a Trade Document is as follows: starting from any of the main tabs (Messages, Trade Documents, Lookups or User Access), select the “Show Trade Document Shortcuts” side bar and select Create Highway Conveyance Document (see <i>Figure 6-1, item 6</i>).
--	---



4. Complete all mandatory fields within the **General** tab (see *Figure 6-11*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home ▸ Business Accounts ▸ PORTAL 17 (2471)

Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages | Trade Documents | Lookups | User Access

Create Highway Conveyance Document

Carrier Name: **PORTAL 17**
Carrier Code: **2471**

All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): **2471** 111222333444555

Complete all mandatory fields within the tabs below.

General | Tractor | Trailer

Estimated Date of Arrival: (YYYYMMDD) 20130425

Estimated Time and Time Zone of Arrival: (hh:mm) 1 : 00 Eastern

First Port of Arrival: 0211 - St. Stephen - Commercial or Select a Port

Empty/Loaded Status: Empty
Loaded

General | Tractor | Trailer

Complete all mandatory fields within the tabs above.

Check for Errors Save and Continue Save and Finish Later Submit to the CBSA

[Print/Download Document \(PDF, 1034KB\)](#) Cancel

Preferred Time Zone: Eastern

Figure 6-11 Trade Documents tab – Create Highway Conveyance Document


5. You will need to complete the fields within either or both the **Tractor** and **Trailer** tabs as required.



All submitted and accepted Highway Cargo Documents (CCNs) should be linked to either one, or both of, the **Tractor** and **Trailer** tabs as required. The process and available options for linking CCN(s) are the same in both tabs. For the purpose of this example, the **Trailer** tab has been selected to describe how to link cargo to the Highway Conveyance Document and add another container.



6. Select **Enter Trailer Information** (see *Figure 6-12*).

eManifest Portal  Canada

Business Accounts ▾ My Profile


Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages Trade Documents **Lookups** User Access

Create Highway Conveyance Document ?

Carrier Name: **PORTAL 17**
Carrier Code: **2471**



All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): **2471** 

Complete all mandatory fields within the tabs below.

General | **Tractor** | **Trailer**

Trailer information is mandatory if available. **Note: You may enter up to 3 Trailers.**

Enter Trailer Information  **Select a Trailer Lookup** 

No Trailers

Number	Trailer Plate	Number of Containers	Edit	Delete
Trailer list is empty				

General | **Tractor** | **Trailer**

Complete all mandatory fields within the tabs above.


[Print/Download Document \(PDF, 1034KB\)](#)

Preferred Time Zone: Eastern


Figure 6-12 Trade Documents tab – Enter Trailer Information



7. Enter the Trailer information (see *Figure 6-13*).

eManifest Portal  Canada

Business Accounts ▾ My Profile


Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
eManifest Portal Help and Support  | [Log out](#)


Messages Trade Documents **Lookups** User Access


Create Highway Conveyance Document


Trailer #1


All fields are mandatory unless otherwise specified.


Enter Trailer information below or 


Trailer Lookup Name (mandatory if creating a Lookup): 

Trailer Identifier (mandatory if available): 

Trailer Plate: 

Trailer Plate Country: 

Trailer Plate Province/State: 

Use the above information to 

Trailer Seal Number(s) (mandatory if available): (You may add up to 20. If entering multiple Seal Numbers, separate with commas or select the Enter key after each Seal Number.)

Trailer #1 Cargo Information

If cargo is loaded on Trailer #1 the Cargo Control Number(s) (CCN) for these goods must be identified unless Exception(s) apply.

Cargo Control Number(s) (CCNs)

Enter CCN(s) below or (if applicable).

List of Associated CCN(s): (If entering multiple CCNs, separate with commas or select the Enter key after each CCN.)

[Do Cargo Exception\(s\) apply?](#)

Container(s)

Container information is mandatory if available. Note: You may enter up to 5 containers for trailer # 1.

No Containers

Number	Container Identifier	Edit	Delete
Containers list is empty			

Preferred Time Zone: Eastern

Figure 6-13 Trade Documents tab – Enter Trailer Information #01



- Link all related Cargo Documents to this conveyance and select **Select** (see *Figure 6-14*).



You can add Highway Cargo Documents to the Highway Conveyance Document manually by entering the known CCN(s), or you can use the **Select a CCN(s)** option to link to the Highway Conveyance Document from the **Unassociated CCN(s)** list (see *Figure 6-14*).

eManifest Portal Canada

Business Accounts | My Profile

Home > Business Accounts > PORTAL 18 (5472) Test User(URN: TU041568)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages | Trade Documents | Lookups

Select a CCN(s)

Select a CCN(s) which has been submitted to the CBSA but not yet associated with a Highway Conveyance Document.

Unassociated CCN(s) 1 - 2 of 2

Select	Cargo Control Number (CCN) ▲	Consolidated Freight	Status
<input type="checkbox"/>	5472EEE123456789	Yes	Not Matched
<input type="checkbox"/>	5472JJJ123456789	Yes	Not Matched

Preferred Time Zone: Eastern

Figure 6-14 Trade Documents tab – Select a CCN(s)



9. Enter any **Cargo Exceptions** if applicable (see *Figure 6-15*).



If cargo is loaded on Trailer #01, the Cargo Control Number(s) (CCN) for these goods must be identified unless exception(s) apply.

Trailer #1

All fields are mandatory unless otherwise specified.

Enter Trailer information below or [Select a Trailer Lookup](#).

Trailer Lookup Name (mandatory if creating a Lookup):

Trailer Identifier (mandatory if available):

Trailer Plate:

Trailer Plate Country:

Trailer Plate Province/State:

Use the above information to [Create Trailer Lookup](#).

Trailer Seal Number(s) (mandatory if available): (You may add up to 20. If entering multiple Seal Numbers, separate with commas or select the Enter key after each Seal Number.)

Trailer #1 Cargo Information

If cargo is loaded on Trailer #1 the Cargo Control Number(s) (CCN) for these goods must be identified unless Exception(s) apply.

Cargo Control Number(s) (CCNs)

Enter CCN(s) below or [Select a CCN\(s\)](#) (if applicable).

List of Associated CCN(s): (If entering multiple CCNs, separate with commas or select the Enter key after each CCN.)

Cargo Exception(s)

Enter the number of Cargo(s) that apply for each type of Exception (if applicable):

Courier Low Value Shipment:

Instrument of International Trade:

Postal:

Flying Trucks:

Emergency Repairs:

Container(s)

Container Information is mandatory if available. Note: You may enter up to 5 containers for trailer # 1.

[Enter Container Information](#)

No Containers			
Number	Container Identifier	Edit	Delete
Containers list is empty			

[Save](#) [Cancel](#)

Figure 6-15 Trade Documents tab – Highway Conveyance Document (Trailer tab)

10. Select **Save** (see *Figure 6-15*).



11. Select **Submit to the CBSA**.
12. If no errors are detected, a submission confirmation will appear. Select **Yes** to continue or **No** to cancel the Trade Document submission.
13. If **Yes** was selected, a **Submitted to the CBSA** message will be displayed under the **Trade Documents** tab confirming the Highway Conveyance Document was successfully submitted.
14. Select **OK** (see *Figure 6-16*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Submitted to the CBSA

Your Highway Conveyance Document has been submitted to the CBSA.

Conveyance Reference Number (CRN): **2471123456**

Submitted Date/Time: **2013-03-28 08:40**

Note: An optional Lead Sheet is provided to you from the CBSA. You can access this Lead Sheet by selecting the Print/Download Lead Sheet below. You must present either the eManifest Portal Lead Sheet or your own bar-coded document to the Border Services Officer upon arrival in Canada.

[Print/Download Lead Sheet \(PDF, 885KB\)](#)

[Print/Download Document \(PDF, 3167KB\)](#)

▶ [Use submitted Highway Conveyance Document information to create Trade Document Lookup](#)

OK

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-16 Trade Documents tab – Highway Conveyance Document (Submit to the CBSA)

	<p>You can print or download the Lead Sheet and/or the Highway Conveyance Document by selecting the associated link (see section 6.8 of this Guide).</p> <p>You can also choose to select the option Use submitted Highway Conveyance Document information to create Trade Document Lookup for which you need to provide a Lookup name (see section 7.2.3 of this Guide).</p>
--	--



6.4 Draft Documents tab

The **Draft Documents** tab provides you with a list of all Draft Trade Documents previously saved by all users in your Business Account.

When you select the option to **Save and Finish Later** or **Save and Continue** while creating a Trade Document, your document is saved as a Draft Trade Document in the Portal and is available for future editing.

The figure below provides an overview of the column heading names within the **Draft Documents** tab (see *Figure 6-17*).

The screenshot shows the eManifest Portal interface. At the top, there is a header with the eManifest Portal logo and the word 'Canada' next to a red maple leaf. Below the header is a navigation bar with 'Business Accounts' and 'My Profile' tabs. The main content area has a breadcrumb trail: 'Home > Business Accounts > PORTAL 18 (5472)'. On the right side, there is a user profile section: 'Test User(URN: TU041568)' with links for 'eManifest Portal Help and Support' and 'Log out'. Below this is a sub-navigation bar with 'Messages', 'Trade Documents', and 'Lookups' tabs. The 'Trade Documents' section has a 'Trade Document' title and a search bar with 'Create Trade Document' and 'Search Submitted Trade Documents' buttons. Below the search bar are three tabs: 'Submitted Documents', 'Draft Documents' (which is selected and circled), and 'Secondary Notices'. A note states: 'Note: You may save an additional 99 Draft Trade Documents for this Business Account. Documents 1 - 1 of 1'. A table with the following data is displayed:

Document Number	Document Type	Saved Date/Time	Action
5472CCNHELDJULY07	Highway Cargo Document	2016-07-07 14:44	Delete

At the bottom of the table, there is a 'Customize List/Tab' button. The page footer indicates 'Preferred Time Zone: Eastern'. On the right side of the page, there is a vertical sidebar with the text 'Show Trade Document Shortcuts'.

Figure 6-17 Trade Documents tab – Draft Documents tab (Column Headings)



Column Heading		Description
1	Document Number	The CCN or CRN of the associated document. For a Combined Highway Document, this column will display the CRN, if available. If this data has not been provided in the document, the carrier code will be displayed.
2	Document Type	Indicates the type of Draft Trade Document: <ul style="list-style-type: none">• Combined Highway Document• Highway Cargo Document• Highway Conveyance Document
3	Saved Date/Time	The date and time the Draft Trade Document was saved.
4	Action	Allows you to delete the Draft Trade Document from the Draft Documents list.



6.4.1 Completing a Draft Trade Document

i	You can complete any of the available Draft Trade Documents from the list within the Business Account.
i	It is recommended that only one user edits a Draft Trade Document at a time as only one user's data can be saved or submitted.
i	Selecting Delete will permanently remove the Trade Document from your Business Account. You are prompted to confirm or cancel the Delete action.
Start at:	Trade Documents tab.

1. Select the **Draft Documents** sub-tab. In the first column of the Draft Trade Documents, select the Document Number of the Trade Document that you want to complete (see *Figure 6-18*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, there are tabs for 'Messages', 'Trade Documents', and 'Lookups'. The 'Trade Documents' tab is active, and within it, the 'Draft Documents' sub-tab is selected. A note indicates that the user can save an additional 99 Draft Trade Documents. A table displays the following data:

Document Number	Document Type	Saved Date/Time	Action
5472CCNHELDJULY07	Highway Cargo Document	2016-07-07 14:44	Delete

Buttons for 'Create Trade Document' and 'Search Submitted Trade Documents' are visible at the top of the document list. A 'Customize List/Tab' button is located below the table. The preferred time zone is set to Eastern.

Figure 6-18 Trade Documents tab – Draft Documents tab

2. Complete all tabs and remaining fields in the selected Trade Document.



3. Select **Submit to the CBSA** (see *Figure 6-19*).

eManifest Portal Canada

Business Accounts | My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages | Trade Documents | Lookups | User Access

Create Combined Highway Document ?

Carrier Name: **PORTAL 17**
Carrier Code: **2471**

All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): **2471**

Cargo Control Number (CCN): **2471**

Complete all mandatory fields within the tabs below.

General | Ports | Tractor | Trailer | Addresses | Cargo

Estimated Date of Arrival: (YYYYMMDD)

Estimated Time and Time Zone of Arrival (hh:mm) :

Is this a CSA Shipment?

CSA Shipment: No Yes

If yes, enter the Business Number of the CSA approved Importer:

Consolidation Indicator: No Yes

Ocean Bill of Lading (optional):

Unique Consignment Reference (UCR) Number (optional):

Cargo Location: Tractor Trailer Container

General | Ports | Tractor | Trailer | Addresses | Cargo

Complete all mandatory fields within the tabs above.

[Print/Download Document \(PDF, 2000KB\)](#)

Preferred Time Zone: Eastern

Figure 6-19 Trade Documents tab – Combined Highway Document



If you are submitting a Combined Highway Document, proceed to [section 6.3.2](#), step 6.
 If you are submitting a Highway Cargo Document, proceed to [section 6.3.3](#), step 6.
 If you are submitting a Highway Conveyance Document, proceed to [section 6.3.4](#), step 11.

6.4.2 Customizing the Draft Documents List/Tab

You can change the number of documents displayed on the Draft Documents list with the **Customize Draft Documents List** function.



By default, 10 documents are displayed on each Draft Documents page.

Start at: Trade Documents tab

1. Select the **Draft Documents** sub-tab and then **Customize List/Tab** (see *Figure 6-20*).

The screenshot shows the eManifest Portal interface. At the top, there is a blue header with 'eManifest Portal' on the left and the 'Canada' logo on the right. Below the header is a navigation bar with 'Business Accounts' and 'My Profile'. The main content area has tabs for 'Messages', 'Trade Documents', and 'Lookups'. The 'Trade Documents' tab is active, showing sub-tabs for 'Submitted Documents', 'Draft Documents', and 'Secondary Notices'. The 'Draft Documents' sub-tab is selected, displaying a note about saving 99 draft documents and a table with one document entry. The document number '5472CCNHELDJULY07' is highlighted, and a 'Customize List/Tab' link is circled below it. The table has columns for Document Number, Document Type, Saved Date/Time, and Action.

Document Number	Document Type	Saved Date/Time	Action
5472CCNHELDJULY07	Highway Cargo Document	2016-07-07 14:44	Delete

Figure 6-20 Trade Documents tab – Draft Document – Customized List/Tab

2. Under **Customize Draft Documents List**, select the number (10, 25 or 50) of documents you want to be displayed (see *Figure 6-21*).



3. Select **Save** (see *Figure 6-21*).

The screenshot shows the 'Customize List/Tab' dialog box in the eManifest Portal. It is titled 'Customize List/Tab' and contains two main sections. The first section, 'Customize Draft Documents List', has a label 'Number of items to display per page:' followed by a dropdown menu with options 10, 25, and 50. The second section, 'Customize Trade Document Tab', has a label 'Default Trade Document Sub-Tab:' followed by a dropdown menu with options Submitted Documents, Draft Documents, and Secondary Notices. Below this is a label 'Default Submitted Documents List Filtering:' followed by three dropdown menus with options All, Current, and Highway Conveyance Document. At the bottom of the dialog are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red. The background shows the eManifest Portal interface with 'Business Accounts' and 'My Profile' tabs, and a breadcrumb trail: Home > Business Accounts > PORTAL 18 (5472). The user is identified as 'Test User(URN: TU041568)' and there are links for 'eManifest Portal Help and Support' and 'Log out'. A vertical sidebar on the right says 'Show Trade Document Shortcuts'. At the bottom of the dialog, it says 'Preferred Time Zone: Eastern'.

Figure 6-21 Trade Documents tab – Draft Document – Save Customization

4. Select **OK** to save your customized settings.

	You can customize the Trade Document sub-tab default in the Trade Documents tab with the Customize Trade Document Tab function.
	By default, the Submitted Documents sub-tab will appear when selecting the Trade Documents tab.
Start at:	Trade Documents tab.

1. Select the **Draft Documents** sub-tab and then **Customize List/Tab** (see *Figure 6-20*).
2. Under **Customize Trade Document Tab**, select the default sub-tab between: Submitted Documents, Draft Documents and Received Documents (see *Figure 6-21*).
3. Select **Save** (see *Figure 6-21*).
4. Select **OK** to save your customized settings.

	You can customize the Submitted Documents list filtering default in the Trade Documents tab with the Customize Trade Document Tab function.
	By default, the Submitted Documents List filtering is set to All, Current, Highway Conveyance Document.



Start at: Trade Documents tab.

1. Select the **Draft Documents** sub-tab and then **Customize List/Tab** (see *Figure 6-20*).
2. Under **Customize Trade Document Tab**, select your default Submitted Documents List filtering preferences by selecting the:
 - Status (All, Accepted, Acquitted, Arrived, Authorized to Deliver, Cancelled, Cargo Complete, Deconsolidated, Document Package Complete, Held for CBSA, Matched, Not Matched, Rejected, Released, Reported or Updating...)
 - Status (Current or Historical); and,
 - Trade Document type (Highway Conveyance Document or Highway Cargo Document) (see *Figure 6-21*).
3. Select **Save** (see *Figure 6-21*).
4. Select **OK** to save your customized settings.

6.5 Submitted Documents tab

All electronic data transmitted to the CBSA will be available in the Portal, whether submitted through the Portal or by EDI. Electronic data can be viewed, changed/amended or cancelled and their status verified within the **Submitted Documents** tab.

	Up to 1000 of your most recent Submitted Trade Documents will be displayed for each document type, based on the Status Date and Time of the Trade Document.
	When you select the Submitted Documents tab, the list of documents shown by default is the current Highway Conveyance Documents for highway carriers and is the current Close Messages for freight forwarders. The list is sorted by the Status Date/Time column, with the most recent date/time at the top of the list.
	If your company submits a very high volume of Trade Documents to the CBSA (whether through the Portal or EDI), the CBSA system may not be able to present a list of your most recent Trade Documents. If this is the case, use the Search Submitted Trade Documents feature in the Trade Documents tab to locate documents by Cargo Control Number or Conveyance Reference Number for highway carriers and by Cargo Control Number or Close Message Number for freight forwarders.



The following table provides an overview of the data presented for each view of Submitted Documents:

Column Name	Highway Conveyance		Highway Cargo	
	Current	Historical	Current	Historical
Conveyance Reference Number (CRN)	✓	✓		
Cargo Control Number (CCN)			✓	✓
Estimated Date/Time of Arrival	✓	✓	✓	✓
Number of Associated CCNs	✓	✓		
Tractor Plate	✓	✓		
Status Date/Time	✓	✓	✓	✓
Status	✓	✓	✓	✓
Consignee Name			✓	✓
Submitted Date/Time	✓	✓	✓	✓
Consolidated Freight			✓	✓
First Port of Arrival			✓	✓
Shipper Name			✓	✓
Source of Transmission	✓	✓	✓	✓



6.5.1 Navigating the Submitted Documents tab

This section contains figures and tables that provide an overview of the **Submitted Documents** tab, navigation features, the data that can be accessed and the available functions (see *Figure 6-22* and *Figure 6-23*).

The screenshot shows the eManifest Portal interface. At the top, there's a header with the eManifest Portal logo and the word "Canada". Below that, navigation tabs include "Business Accounts" and "My Profile". The main content area is titled "Trade Document" and contains several sub-sections: "Submitted Documents", "Draft Documents", and "Secondary Notices".

Annotations 1 through 12 are placed on the interface to highlight specific features:

- 1: Search Submitted Trade Documents button
- 2: Submitted Documents tab
- 3: Filter dropdown menu (All, Current, Historical, Highway Conveyance Document, Highway Cargo Document)
- 4: Highway Conveyance Document filter option
- 5: Refresh button
- 6: Documents 1 - 3 of 3
- 7: Note about Status Warning icon
- 8: Note about rejected documents
- 9: Status dropdown arrow
- 10: Status column in the table
- 11: Conveyance Reference Number (CRN) in the table
- 12: Customize List/Tab button

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Status
5472SO976Y51ATPOE2	2016-08-17 23:59 Eastern	1	2016-08-17 11:44	Accepted
5472CRNTESTCOMPLETE	2016-08-06 10:00 Eastern	1	2016-08-05 12:50	Accepted
5472CRNHELDTTEST120160805	2016-08-06 10:00 Eastern	1	2016-08-05 11:40	Accepted

Preferred Time Zone: Eastern

Figure 6-22 Trade Documents tab – Submitted Documents tab (Highway Conveyance Documents)



Documents 11 - 14 of 14 13 14 15 16 << < Previous 1 2

<u>Cargo Control Number (CCN)</u>	<u>Consignee Name</u>	<u>Estimated Date/Time of Arrival</u>	<u>Status Date/Time</u>	<u>Status</u> 17
5472CCNHELDTTEST120160805	Consignee Name	2016-08-06 10:00 Eastern	2016-08-05 11:40	Held for CBSA
5472CNHELDJULY07 18	Consignee Name	2016-07-08 10:00 Eastern	2016-07-07 14:38	Cargo Complete
5472CCNHELDJULY07	Consignee Name	2016-07-08 10:00 Eastern	2016-07-07 14:25	Arrived
5472SO984HIGHWAYJULY05A	CONSIGNEE NAME	2016-07-05 23:59 Eastern	2016-07-05 10:26	Cargo Complete

Customize List/Tab 19 << < Previous 1 2

Show Trade Document

Preferred Time Zone: Eastern

Figure 6-23 Trade Documents tab – Submitted Documents tab (Highway Cargo Documents)



1	Search Submitted Trade Documents	Allows you to search for a specific previously-submitted Trade Document. See section 6.5.3 of this Guide for detailed procedures.
---	---	---

Filtering Submitted Documents allows you to specify criteria which will narrow the type of Trade Documents displayed in the list. The following table summarizes the filter options, the column headings for the different lists and the available functions.

Filter Submitted Documents (see <i>Figure 6-22</i>)		
	Filter Options	Description
2	Status	The Status represents the latest status of the Trade Document.
	<ul style="list-style-type: none"> • All 	All submitted Trade Documents Statuses will be displayed.
	<ul style="list-style-type: none"> • Accepted 	Indicates a Trade Document has passed validation checks and has been accepted by the CBSA.
	<ul style="list-style-type: none"> • Acquitted (Cargo/House bill Documents only) 	Indicates goods are no longer controlled by a Highway Cargo Document (for highway carriers). Indicates goods are no longer controlled by a House bill (for freight forwarders).
	<ul style="list-style-type: none"> • Arrived (Cargo/House bill Documents only) 	Indicates the client's Cargo has arrived at its Port of Destination (for highway carriers). Indicates that the client's House bill has arrived at its Port of Destination (for freight forwarders).
	<ul style="list-style-type: none"> • Authorized to Deliver (Cargo Documents only) 	Indicates the CSA goods can be delivered to the intended recipient.
	<ul style="list-style-type: none"> • Cancelled 	Indicates a Trade Document submission has been cancelled by the client or internally by the CBSA.
	<ul style="list-style-type: none"> • Cargo Complete (Cargo/House bill Documents only) 	Indicates a non-consolidated Primary Cargo Document has been transmitted to the CBSA and Accepted. If consolidated, it indicates that all of the related secondary cargo (i.e. House bills) has been transmitted as well.
	<ul style="list-style-type: none"> • Deconsolidated (Cargo/House bill Documents only) 	Indicates that the CBSA has authorized the transfer of Cargo Control from a consolidated shipment to the related secondary House bills that were submitted to CBSA.
<ul style="list-style-type: none"> • Document Package Complete (Cargo/House bill Documents only) 	Indicates all shipments described by a Cargo Document are linked to a pre-arrival Release.	



	<ul style="list-style-type: none"> • Held for CBSA (Cargo/House bill Documents only) 	Indicates the cargo is being held for further determination/processing and cannot be released.
	<ul style="list-style-type: none"> • Matched (Cargo/House bill Documents only) 	Indicates a specific Trade Document is linked to a related Trade Document (for highway carriers). Indicates a Close Message is linked to one or more House bills (for freight forwarders).
	<ul style="list-style-type: none"> • Not Matched (Cargo/House bill Documents only) 	Indicates either no links to a related Trade Document have been established, or a document that has previously been Matched to another document becomes unlinked through a change or cancellation (for highway carriers). Indicates a House bill has no links to a Close Message (for freight forwarders).
	<ul style="list-style-type: none"> • Rejected 	Indicates a Trade Document has been rejected by the CBSA and the rejection reason(s) is provided.
	<ul style="list-style-type: none"> • Released (Cargo/House bill Documents only) 	Indicates when goods have been authorized to be removed from the CBSA office, a sufferance warehouse, or a bonded warehouse for use in Canada.
	<ul style="list-style-type: none"> • Reported 	Indicates a Highway Conveyance Document and associated Highway Cargo Document(s), if applicable, have reported at First Canadian Port of Arrival as per the requirements of Section 12(1) of the <i>Customs Act</i> (for highway carriers). Indicates goods declared on the House bill have reported at the First Canadian Port of Arrival as per the requirements of Section 12(1) of the <i>Customs Act</i> (for freight forwarders).
	<ul style="list-style-type: none"> • Updating... 	Indicates a Trade Document submitted to the CBSA using the Portal is being processed.
3	Current	Submitted Trade Documents remain on the Current list for 24 hours after reaching a final Status. After the 24-hour period, the Trade Documents are moved to the Historical Documents list.
	Historical	Trade Documents remain on the Historical list for approximately 60 days and are then removed. Once removed from the Historical list, Trade Documents may be found using the Search Submitted Documents feature..
4	Highway Conveyance Document	Only Highway Conveyance Documents will be displayed in the list.



	Highway Cargo Document	Only Highway Cargo Documents will be displayed in the list.
5	Refresh	Selecting Refresh generates and produces the requested filtered documents list.

Highway Conveyance Documents List (see <i>Figure 6-22</i>)		
	Column Headings	Description
6	Conveyance Reference Number (CRN)	Selecting the CRN from the list will open the Trade Document.
7	Estimated Date/Time of Arrival	The estimated date and time the conveyance will arrive at the border.
8	Number of Associated CCNs	The total number of CCNs associated to the Trade Document.
9	Status Date/Time	The date and time the Trade Document was submitted.
10	Status	Displays the status of the Trade Document.
11	Trade Documents List	Displays the list of Trade Documents available for the selections. Note: A maximum of 1000 Trade Documents for each document type can be displayed in the list.
12	Customize List/Tab	Allows you to customize the look of the page. See section 6.5.4 in this Guide for detailed procedures.

Highway Cargo Documents List (see <i>Figure 6-23</i>)		
	Column Headings	Description
13	Cargo Control Number (CCN)	Selecting the CCN from the list will open the Trade Document.
14	Consignee Name	The name of the Consignee of the cargo.
15	Estimated Date/Time of Arrival	The estimated date/time of arrival when the specified goods will first arrive in Canada.
16	Status Date/Time	The date and time the Trade Document was submitted.
17	Status	Displays the status of the Trade Document.
18	Trade Documents List	Displays the list of Trade Documents available for the selections. Note: A maximum of 1000 Trade Documents for each document type can be displayed in the list.
19	Customize List/Tab	Allows you to change the appearance of the page. See section 6.5.4 in this Guide for detailed procedures.











6.5.2 Checking the status of Submitted Trade Documents

The status of your Submitted Trade Documents with the CBSA can be found under the **Trade Documents** tab. To view details of a particular document, including its status history, select and open the desired document.

Status refers to the status of the latest version of a Trade Document received by the CBSA.

This section provides an overview of statuses only detailed business rules are outlined in the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#).

	<p>To check the status of your Combined Highway Document, you must check the status of the Highway Cargo and Highway Conveyance Documents separately. Once a Combined Highway Document has been submitted, it is split into one Highway Conveyance and one Highway Cargo Document for processing as separate Trade Documents. Refer to section 6.3.4 of this Guide for detailed information.</p>
	<p>The  symbol is only displayed in special circumstances in relation to the original Trade Document Submission or to Changes, Amendments or Cancellations to Highway Cargo or Highway Conveyance Documents. It means that a Carrier submission has not passed business validation checks performed by the CBSA system and that the Trade Document Submission is currently rejected by the CBSA system. If a Trade Document Submission is rejected and the  symbol is displayed, a Change or an Amendment must be made to that document and resubmitted to the CBSA. When a Change, Amendment or Cancel of a Trade Document is rejected and the  symbol is displayed, if the previous version of the Trade Document was accepted it remains in the CBSA system until such time as the carrier resubmits the Trade Document Change, Amendment or Cancel again and passes the CBSA system's business validation rules. If there is no accepted version, it will need to be updated until it passes the CBSA system business validation rules.</p> <p>If a duplicate document number has been submitted, the  symbol will be displayed on the submitted list. In order to use the duplicate document data, a change to the document's CCN or CRN will need to be done and resubmitted.</p> <p>If a Portal user sees the  symbol next to a Trade Document's status, the user should view the Trade Document Status History. The Status History will indicate the carrier's most recent Submission was rejected and will provide the reason(s) for the rejection. If another Change, Amendment or Cancel is submitted for the Trade Document and it passes the CBSA system's business validation, the  symbol will no longer be shown.</p>

6.5.2.1 Status History



This section outlines the data contained within the Status History page. The Status History page provides a list of all statuses related to the selected Trade Documents as well as associated messages, including error messages (see *Figure 6-24*).

The Status History page can be accessed by selecting the Status of a Submitted Trade Document (see *Figure 6-23, item 17*).

The Status History for a Trade Document can also be downloaded and/or printed when viewing the Status History page (see *Figure 6-24*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 18 (5472) Test User(URN: TU041568)
eManifest Portal Help and Support | Log out

Messages | Trade Documents | Lookups

Status History

Conveyance Reference Number (CRN): [5472S0976Y51ATPOE2](#)
 Document Type: **Highway Conveyance Document**
 Carrier Name: **PORTAL 18**
 Carrier Code: **5472**
 Status: **Accepted (2016-08-17 11:44)** ①

Status History 1 - 2		
Date/Time ▼	Status	Message
2016-08-17 11:44	Accepted	This Conveyance Document has been accepted by the CBSA.
2016-08-17 11:44	Submitted	This Conveyance Document has been submitted to the CBSA.

Status History Details

[Top Of List](#) ③

Date/Time:	2016-08-17 11:44
Status:	Accepted
Message:	This Conveyance Document has been accepted by the CBSA.

[Print/Download Status History \(Select to view PDF size\)](#) ④

Preferred Time Zone: Eastern

Figure 6-24 Trade Documents tab – Status History (Highway Conveyance Document)



Section		Description
1	Trade Document Information	For all Trade Documents, provides the following information: <ul style="list-style-type: none"> • Trade Document Number (CRN or CCN); • Type of document (Cargo or Conveyance); • Carrier Name; • Carrier Code; and • Status
2	Status History	Provides a list of all statuses that the Trade Document has undergone since being submitted to the CBSA. Notes: <ul style="list-style-type: none"> • The list can be sorted by ascending or descending order of the Date/Time column heading. • You can get additional information by selecting any document Status from the list. The information will be displayed in Status Details.
3	Status History Details	Details of the selected document status will be displayed in Status History Details, including any Trade messages associated with the document. This allows the user to view the reason(s) a document has been rejected.
4	Print/Download Status History	To Print/Download the Status History, see section 6.8 of this Guide. The Print/Download process is the same for all available reports in the Portal.

	Submitted is displayed in your Trade Document's Status History to reflect the date and time your Trade Document was submitted to the CBSA using the Portal.
--	--

6.5.2.2 Section 12 (1) Report

Section 12(1) is part of the Customs Act. A Section 12(1) Report is available for print and/or downloads once your goods have arrived on the conveyance at the First Canadian Port of Arrival. This report is used for auditing and record-keeping purposes and is proof the imported goods have been reported to the CBSA (see *Figure 6-26*).

For more information, see the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#) (for highway carriers).

	It is your responsibility to save a copy of the Section 12(1) Report for audit purposes. The Portal should not be used to store the Section 12(1) Report or Trade Documents.
	The option to download and print a Section 12(1) Report is available after the Conveyance Trade Document status is Reported.



You will be able to print and download the Section 12(1) Report by viewing the Submitted Highway Conveyance Document after the conveyance has arrived (see Figure 6-25).

eManifest Portal Canada

Business Accounts | My Profile

Home > Business Accounts > North Pole Carrier (zzzz) Test User (URN: TU123456)
eManifest Portal Help and Support | Log out

Messages | Trade Documents | Lookups | User Access

Submitted Highway Conveyance Document

[Edit Document](#) [Cancel Submission...](#)

[Print/Download Lead Sheet \(Select to view PDF size\)](#)
[Print/Download Document \(Select to view PDF size\)](#) [< Back](#)

Carrier Name: **North Pole Carrier**
Carrier Code: **2227**
Status: **Reported** (2007-04-30 02:34)
Port of Report: **Rainbow Bridge (0125)**

[Print/Download Section 12\(1\) Report \(Select to view PDF size\)](#)

Conveyance Reference Number (CRN): **ZZZ875638929592355622362**

General | Tractor | Trailer

Estimated Date of Arrival: **2007-04-30**
Estimated Time and Time Zone of Arrival: **05:45 Eastern**
First Port of Arrival: **Rainbow Bridge (0125)**
Empty/Loaded Status: **Loaded**

General | Tractor | Trailer

[Edit Document](#) [Cancel Submission...](#)

[Print/Download Lead Sheet \(Select to view PDF size\)](#)
[Print/Download Document \(Select to view PDF size\)](#) [< Back](#)

Preferred Time Zone: Mountain

Sw Trade Document Shortcuts

Figure 6-25 Trade Documents tab – Submitted Highway Conveyance Document (Status)



Canada Border Services Agency
Agence des services frontaliers du Canada

Section 12(1) Report
Déclaration visée à l'article 12(1)

Conveyance Reference Number - Numéro de référence du moyen de transport :
24172013-04-02-002

Carrier Name - Nom du transporteur : Portel 17	Port of Report - Bureau de déclaration : Blue Water Bridge - Commercial (0440)	Date/Time of Report - Date et heure de la déclaration : 2013-04-13 11:22:40T
---	---	---

Cargo Control Number(s) (CCN) - Numéro(s) de contrôle du fret (NCF) :
24172013-04-2014-002

Canada



Figure 6-26 Section 12(1) Report



6.5.3 Searching Submitted Trade Documents

This section outlines the different ways to search for a Submitted Document.

The **Search Submitted Trade Documents** function allows you to search for a specific Highway Cargo or Highway Conveyance Document that has been submitted to the CBSA. The Trade Document number (CRN or CCN) is required and only exact matches of the number will be displayed.

	The full CCN or CRN must be entered. If you enter only a partial CCN or CRN, you will receive an error message. Only exact matches will be displayed. Please note that the carrier code is already entered for convenience.
	The Portal will search both current and historical documents that meet your search criteria exactly as entered.
Start at:	Trade Documents tab.

1. Select **Search Submitted Trade Documents** (see *Figure 6-22 – item 1*).
2. In Search in, select either **Submitted Highway Conveyance Documents** or **Submitted Highway Cargo Documents**. Then enter the Document Number, either the **CCN** or the **CRN** of the Trade Document you want to find (see *Figure 6-27*).
3. Select **Search** (see *Figure 6-27*).



Figure 6-27 Trade Documents tab – Search Submitted Trade Documents



4. The matching Trade Document will be displayed (see *Figure 6-28*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, the breadcrumb trail reads 'Home > Business Accounts > PORTAL 18 (5472)'. The user is identified as 'Test User(URN: TU041568)' with options for 'eManifest Portal Help and Support' and 'Log out'. The main content area is titled 'View Submitted Highway Conveyance Document' and includes tabs for 'Messages', 'Trade Documents', and 'Lookups'. The document details are as follows:

- Carrier Name: **PORTAL 18**
- Carrier Code: **5472**
- Status: **Accepted (2016-08-17 11:44)**
- Conveyance Reference Number (CRN): **5472S0976Y51ATPOE2** (circled)
- General tab selected:
 - Estimated Date of Arrival: **2016-08-17**
 - Estimated Time and Time Zone of Arrival: **23:59 Eastern**
 - First Port of Arrival: **Niagara Falls (0427)**
 - Empty/Loaded Status: **Loaded**

Buttons for 'Edit Document', 'Cancel Submission...', 'Print/Download Lead Sheet (Select to view PDF size)', 'Print/Download Document (Select to view PDF size)', and '< Back' are visible. A vertical sidebar on the right contains 'Show Trade Document Shortcuts'. At the bottom, it states 'Preferred Time Zone: Eastern'.

Figure 6-28 Trade Documents tab – Submitted Trade Documents Search Results

	If no matching document is found, you can either change your search criteria or cancel the search.
	If the Trade Document is found in archived status, the details will not be available for viewing in the Portal. If you require a copy, contact the CBSA's Technical Commercial Client Unit (TCCU) .



6.5.4 Customizing the Submitted Documents List/Tab

You can change the number of documents displayed on the Submitted Documents list with the **Customize List/Tab** function. By using your filter, you can choose to customize your **Submitted Documents** tab differently by selecting the status, version type (current or historical) and Submitted Document type.

	By default, 10 documents are displayed on each Submitted Documents page.
Start at:	Trade Documents tab.

1. From the **Submitted Documents** sub-tab, by using the filter, select the Document Type you would like to customize. As an example, select **All**, **Current** and **Highway Conveyance Document**.
2. Select **Refresh**.
3. Select **Customize List/Tab** (see *Figure 6-23 – item 12*).
4. Under **Customize Submitted Current Highway Conveyance Documents List**, select the number (10, 25 or 50) of documents you want displayed (see *Figure 6-29*).
5. Select **Save** (see *Figure 6-29*).



Customize List/Tab

Customize Submitted Current Highway Conveyance Documents List

Number of items to display per page:

List Columns

Available Columns:

- Tractor Plate
- Source of Transmission
- Submitted Date/Time

Buttons: Add>>, <<Remove

Displayed Columns (up to 5 columns may be displayed):

- 1.-Conveyance Reference Number
- 2.-Estimated Date/Time of Arrival
- 3.-Number of Associated CCNs
- 4.-Status Date/Time
- 5.-Status

Buttons: Move Up, Move Down

Customize Trade Document Tab

Default Trade Document Sub-Tab: Submitted Documents, Draft Documents, Secondary Notices

Default Submitted Documents List Filtering: All | Current | Highway Conveyance Document

Buttons: Save, Cancel

Preferred Time Zone: Eastern

Figure 6-29 Trade Documents tab – Customize List View

6. Select **OK** to save your customized settings.

You can customize the List Columns displayed in the **Submitted Documents** tab with the **List Columns** function.


	<p>By default, the following columns are displayed:</p> <p>Submitted Conveyance Documents: Conveyance Reference Number, Estimated Date/Time of Arrival, Number of Associated CCNs, Status Date/Time and Status.</p> <p>Submitted Cargo Documents: Cargo Control Number, Consignee Name, Estimated Date/Time of Arrival, Status Date/Time and Status.</p>
Start at:	Trade Documents tab.

1. From the **Submitted Documents** sub-tab, select **Customize List/Tab** (see *Figure 6-22 – item 12*).



2. Under **List Columns**, select the columns you would like displayed from the following list:
 - **Submitted Conveyance Documents**: Conveyance Reference Number, Estimated Date/Time of Arrival, Number of Associated CCNs, Status Date/Time, Status, Tractor Plate, Source of Transmission and Submitted Date/Time (see *Figure 6-29*).
 - **Submitted Cargo Documents**: Cargo Control Number, Consignee Name, Status Date/Time, Status, Submitted Date/Time, Consolidated Freight, Estimated Date/Time of Arrival, First Port of Arrival, Shipper Name and Source of Transmission.
3. Select **Save** (see *Figure 6-29*).
4. Select **OK** to save your customized settings.


You can customize the **Trade Document** sub-tab default in the **Trade Documents** tab with the **Customize Trade Document Tab** function.

	By default, the Submitted Documents sub-tab will appear when selecting the Trade Documents tab.
---	---

Start at:	Trade Documents tab.
------------------	-----------------------------

1. From the **Submitted Documents** sub-tab, select **Customize List/Tab** (see *Figure 6-22 – item 12*).
2. Under **Customize Trade Document Tab**, select the default sub-tab between: Submitted Documents, Draft Documents and Secondary Notices (see *Figure 6-29*).
3. Select **Save** (see *Figure 6-29*).
4. Select **OK** to save your customized settings.

You can customize the Submitted Documents list-filtering default in the **Trade Documents** tab with the **Customize Trade Document Tab** function.

	By default, the Submitted Documents List filtering is set to All, Current, Highway Conveyance Document.
---	---

Start at:	Trade Documents tab.
------------------	-----------------------------

1. From the **Submitted Documents** sub-tab, select **Customize List/Tab** (see *Figure 6-22 – item 12*).
2. Under **Customize Trade Document Tab**, select your default Submitted Documents List-filtering preferences by selecting the:
 - Status (All, Accepted, Acquitted, Arrived, Authorized to Deliver, Cancelled, Cargo Complete, Deconsolidated, Document Package Complete, Held for CBSA, Matched, Not Matched, Rejected, Released, Reported or Updating...);
 - Status (Current or Historical); and,
 - Trade Document type (Highway Conveyance Document or Highway Cargo Document (see *Figure 6-29*).
3. Select **Save** (see *Figure 6-29*).
4. Select **OK** to save your customized settings.



6.6 Editing a Submitted Document

This section outlines how to edit (change or amend) a Submitted Trade Document. All Highway Cargo and Highway Conveyance Documents can be edited after being submitted to the CBSA.

For additional information on the Change/Amendment rules for Highway Cargo and Highway Conveyance Documents, refer to the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#).

The following example provides instructions for making an Amendment to a Submitted Highway Conveyance Document.

Start at:	Trade Documents tab.
------------------	-----------------------------

1. From the **Submitted Documents** tab, select: Accepted, Current, Highway Conveyance Document from filter list (see *Figure 6-22*).
2. Select **Refresh**.
3. Select the **Trade Document** that you want to edit from the list of available Trade Documents (see *Figure 6-22 – Item 11*).



4. Select **Edit Document** (see *Figure 6-30*).

The screenshot displays the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile' tabs. Below this, the breadcrumb trail reads 'Home > Business Accounts > PORTAL 18 (5472)'. The user is identified as 'Test User(URN: TU041568)' with options for 'eManifest Portal Help and Support' and 'Log out'. The main content area is titled 'View Submitted Highway Conveyance Document' and includes an 'Edit Document' button (circled in red) and a 'Cancel Submission...' button. Below these are links for 'Print/Download Lead Sheet (Select to view PDF size)' and 'Print/Download Document (Select to view PDF size)', along with a '< Back' button. The document details are as follows: Carrier Name: PORTAL 18, Carrier Code: 5472, Status: Accepted (2016-08-17 11:44), and Conveyance Reference Number (CRN): 5472S0976Y51ATPOE2. There are tabs for 'General', 'Tractor', and 'Trailer'. The 'General' tab is active, showing 'Estimated Date of Arrival: 2016-08-17', 'Estimated Time and Time Zone of Arrival: 23:59 Eastern', 'First Port of Arrival: Niagara Falls (0427)', and 'Empty/Loaded Status: Loaded'. A second set of buttons and links is visible at the bottom of the document details section. A vertical sidebar on the right contains the text 'Show Trade Document Shortcuts'. At the bottom of the page, it says 'Preferred Time Zone: Eastern'.

Figure 6-30 Trade Documents tab – Submitted Highway Conveyance Document (Edit Document)

5. Select **Amendment** as the Document Change/Amendment Indicator.



Change or **Amendment** can be selected depending on the status of the Document. Refer to the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#) for more information.

6. Enter the correct information in the fields that need to be amended.

7. Run the **Check for Errors** function (see *Figure 6-31*).



8. If no errors are detected, select **Resubmit to the CBSA** (see *Figure 6-31*).

eManifest Portal Canada

Business Accounts **My Profile**

Home > Business Accounts > PORTAL 18 (5472) Test User(URN: TU041568)
eManifest Portal Help and Support | Log out

Messages Trade Documents **Lookups**

Edit Submitted Highway Conveyance Document

Carrier Name: **PORTAL 18**
Carrier Code: **5472**
Status: **Accepted** (2016-08-17 11:44)

All fields are mandatory unless otherwise specified.

Document Change/Amendment Indicator:

Conveyance Reference Number (CRN): **5472S0976Y51ATPOE2**

Complete all mandatory fields within the tabs below.

General | Tractor | Trailer

Estimated Date of Arrival: (YYYYMMDD)

Estimated Time and Time Zone of Arrival: (hh:mm) :

First Port of Arrival: or

Empty/Loaded Status:

General | Tractor | Trailer

Complete all mandatory fields within the tabs above.

[Print/Download Document \(Select to view PDF size\)](#)

Preferred Time Zone: Eastern

Figure 6-31 Trade Documents tab – Edit Submitted Highway Conveyance Document



9. A list of Conveyance Amendment Reasons will be displayed. Select the appropriate reason (see *Figure 6-32*).



When submitting a post-arrival change, you must select only one reason for amendment. The amendment reasons will be listed in order of priority. When more than one reason applies to a single amendment, use only the reason that is closest to the top of the available list.

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages Trade Documents Lookups User Access

Select Reason for the Amendment

Note: When submitting a post arrival change, you must select only one reason for the amendment. The amendments are listed in order of priority. When more than one reason applies to a single amendment, use only the reason that is closest to the top of the list below.

Conveyance Amendment Reasons 1-6

Select	Conveyance Amendment Reason
<input type="radio"/>	Clerical error when keying conveyance data. (Code: 40)
<input checked="" type="radio"/>	Duplicate Highway Cargo Document (also known as a Cargo Control Document (CCD)), need to cancel one ? e.g. one shipment, 2 Highway Cargo Documents with 2 different Cargo Control Numbers (CCNs) for the same shipment. To be used when cargo is to be de-linked from the conveyance. If required, a request to then cancel the cargo must be provided on paper. (Code 45)
<input type="radio"/>	Entire shipment not laden. To be used when cargo is to be de-linked from the conveyance. If required, a request to then cancel the cargo must be provided on paper. (Code: 50)
<input type="radio"/>	Amendment not elsewhere specified. (Code: 60)
<input type="radio"/>	Change request delayed by client systems outage. (Code: 80)
<input type="radio"/>	Change request delayed by CBSA systems outage. (Code: 85)

Select Cancel

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-32 Trade Documents tab – Edit Submitted Highway Conveyance Document (Select Reason for the Amendment)



10. A **Resubmitted to the CBSA** message will be displayed confirming that the Highway Conveyance Document was successfully resubmitted.
11. Select **OK** (see *Figure 6-33*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages Trade Documents Lookups User Access

Resubmitted to the CBSA

Your Highway Conveyance Document has been resubmitted to the CBSA.

Please note that since you have submitted a change to your original document, it is essential that you review the Status History for this transaction in order to see important information regarding your submission.

Conveyance Reference Number (CRN): **24712013-04-02-002**
Submitted Date/Time: **2013-04-15 11:49**

Note: An optional Lead Sheet is provided to you from the CBSA. You can access this Lead Sheet by selecting the [Print/Download Lead Sheet \(PDF, 885KB\)](#) below. You must present either the eManifest Portal Lead Sheet or your own bar-coded document to the Border Services Officer upon arrival in Canada.

[Print/Download Lead Sheet \(PDF, 885KB\)](#)
[Print/Download Document \(PDF, 3167KB\)](#)

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-33 Trade Documents tab – Resubmitted to the CBSA



6.7 Cancelling a Submitted Document

This section outlines how to Cancel a Submitted Document.

There is a specific sequence that must be followed when cancelling a Submitted Document. The sequence depends on the status of the Trade Document, and whether it is associated with another Trade Document.

The rules and sequence for cancelling (deleting) a Submitted Document are outlined in the [ECCRD – Chapter 7: Advance Commercial Information \(ACI\)/eManifest Highway Portal](#).

The following example provides instructions for cancelling a Submitted Highway Conveyance Document.

Start at:	Trade Documents tab.
------------------	-----------------------------

1. From the **Submitted Documents** tab, select: **All, Current** and **Highway Conveyance Document** from filter list (see *Figure 6-22*).
2. Select the Trade Document that you want to cancel from the list of available Trade Documents (see *Figure 6-22 – Item 11*).
3. Select **Cancel Submission...** (see *Figure 6-34*).



View Submitted Highway Conveyance Document ?

[Print/Download Lead Sheet \(Select to view PDF size\)](#)

[Print/Download Document \(Select to view PDF size\)](#)

Carrier Name: **PORTAL 18**
Carrier Code: **5472**
Status: **Accepted** (2016-08-05 11:40)

Conveyance Reference Number (CRN):**5472CRNHELDTEST120160805**

Estimated Date of Arrival: **2016-08-06**
Estimated Time and Time Zone of Arrival: **10:00 Eastern**
First Port of Arrival: **Niagara Falls (0427)**
Empty/Loaded Status: **Loaded**

[Print/Download Lead Sheet \(Select to view PDF size\)](#)

[Print/Download Document \(Select to view PDF size\)](#)

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-34 Trade Documents tab – Submitted Highway Conveyance Document (Cancel Submission)



4. Select **Yes** to confirm your action (see *Figure 6-35*).

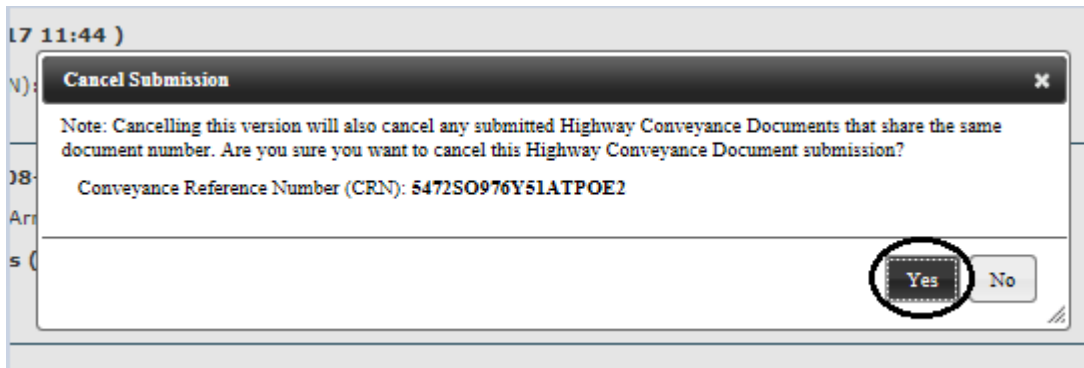


Figure 6-35 Trade Documents tab – Cancel Submission

5. A **Request to Cancel Submission Sent** message will be displayed confirming that the request to cancel the Highway Conveyance Document was sent to the CBSA.
6. Select **OK**.



6.8 Printing/Downloading

The Print/Download option is available throughout the Trade Documents tab. It allows the user to print or download (save) Trade Documents or Lead Sheets in PDF format.

Users are encouraged to place a copy of downloaded Trade Documents on their own computer for record-keeping purposes.

6.8.1 Printing/Downloading a Trade Document

This section outlines how to open and print or download (save) a submitted Trade Document.

Start at:	Trade Documents tab.
------------------	----------------------

1. Select the **Draft Documents** tab or the **Submitted Documents** tab to find the Trade Document you want to Print/Download.
2. Select the **Trade Document** you want to Print/Download (see *Figure 6-36*).

The screenshot shows the eManifest Portal interface. At the top, there is a header with 'eManifest Portal' and the 'Canada' logo. Below the header, there are navigation tabs for 'Business Accounts' and 'My Profile'. The main content area is titled 'Trade Document' and contains a table of submitted documents. The table has the following columns: 'Conveyance Reference Number (CRN)', 'Estimated Date/Time of Arrival', 'Number of Associated CCNs', 'Status Date/Time', and 'Status'. The document with CRN '5472CRNTESTCOMPLETE' is circled in red. Below the table, there is a 'Customize List/Tab' button. The interface also includes a 'Messages' tab, a 'Lookups' tab, and a 'Show Trade Document Shortcuts' button on the right side.

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Status
5472SO976Y51ATPOE2	2016-08-17 23:59 Eastern	1	2016-08-17 11:44	Accepted
5472CRNTESTCOMPLETE	2016-08-06 10:00 Eastern	1	2016-08-05 12:50	Accepted
5472CRNHELDTEST120160805	2016-08-06 10:00 Eastern	1	2016-08-05 11:40	Accepted

Figure 6-36 Trade Documents tab – Submitted Documents tab



3. Select **Print/Download Document** (see *Figure 6-37*).

The screenshot displays the 'eManifest Portal' interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail shows 'Home > Business Accounts > PORTAL 18 (5472)'. The user is identified as 'Test User(URN: TU041568)'. The main content area is titled 'View Submitted Highway Conveyance Document'. It features a set of controls including 'Edit Document', 'Cancel Submission...', and two links: 'Print/Download Lead Sheet (Select to view PDF size)' and 'Print/Download Document (Select to view PDF size)'. A red oval highlights the 'Print/Download Document' link. Below these controls, the document details are listed: Carrier Name: PORTAL 18, Carrier Code: 5472, Status: Accepted (2016-08-05 11:40), and Conveyance Reference Number (CRN): 5472CRNHELDTEST120160805. There are tabs for 'General', 'Tractor', and 'Trailer'. The 'General' tab is selected, showing 'Estimated Date of Arrival: 2016-08-06', 'Estimated Time and Time Zone of Arrival: 10:00 Eastern', 'First Port of Arrival: Niagara Falls (0427)', and 'Empty/Loaded Status: Loaded'. At the bottom, there is a 'Preferred Time Zone: Eastern' label.

Figure 6-37 Trade Documents tab – Submitted Highway Conveyance Document

4. Select **Open** if you want to print the Submitted Highway Conveyance Document (see *Figure 6-38*). Proceed to step 6 if you want to Save the document.

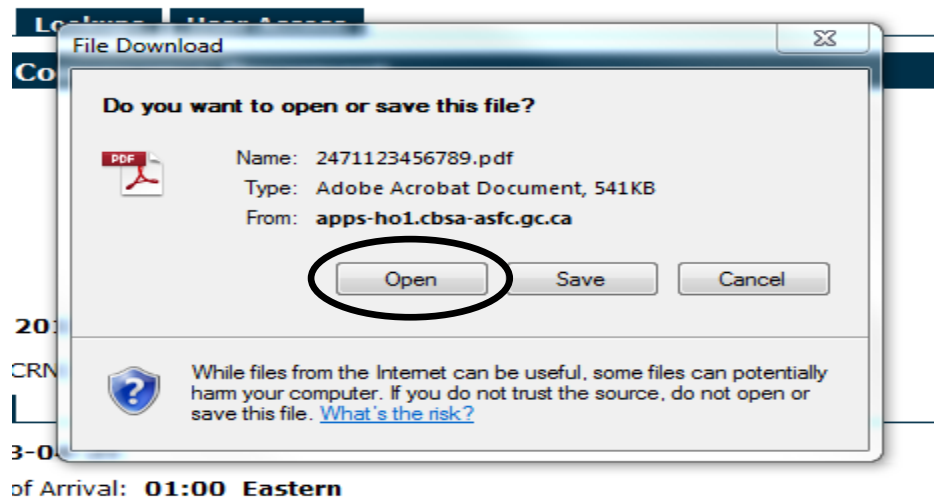


Figure 6-38 File Download

File Download (see <i>Figure 6-38</i>)	
Open	Opens a PDF document and allows the user to print or save the document.
Save	Allows the user to save a copy of the document
Cancel	Cancels the Print/Download request.

5. The Highway Conveyance Document will open in a PDF file format and will be available to print (see *Figures 6-39, 6-40 6-41*).



Conveyance Reference Number - Numéro de référence du moyen de transport

2471123456789

Carrier Name - Nom du transporteur : PORTAL 17		Amendment Reason - Raison pour modification :	
Est. Date / Time of Arrival Date et heure d'arrivée prévues : 2013-04-25 01:00 Eastern	Effective Status at Printing - Statut en vigueur à l'impression : Accepted	Date/Time of Status - Date et heure du statut : 2013-03-28 09:40 Eastern	
First Port of Arrival - Premier bureau d'arrivée : 211 St. Stephen - Commercial	Conveyance Empty or Loaded - Moyen de transport vide ou chargé : <input type="checkbox"/> Empty/Vide <input checked="" type="checkbox"/> Loaded/Chargé		
Tractor Information - Information sur le tracteur :			
Tractor Plate - Plaque d'immatriculation du tracteur : Tracplate1 Nova Scotia Canada		Tractor Identifier - Identificateur du tracteur :	
Tractor Seal Number(s) - Numéro(s) du (des) sceau(x) du tracteur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment - Expédition de faible valeur Instrument of International Trade - Instrument pour le commerce international	Flying Trucks - Expéditions aériennes transportées par camion Postal - Postales	Emergency Repairs - Réparations d'urgence

Trailer 1 Information - Information sur la remorque 1 :			
Trailer Plate - Plaque d'immatriculation de la remorque : tralplate1 Nova Scotia Canada		Trailer Identifier - Identificateur de la remorque :	
Trailer Seal Number(s) - Numéro(s) du (des) sceau(x) de la remorque :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment - Expédition de faible valeur Instrument of International Trade - Instrument pour le commerce international	Flying Trucks - Expéditions aériennes transportées par camion Postal - Postales	Emergency Repairs - Réparations d'urgence
		Container Identifier - Identificateur du conteneur :	
Container Seal Number(s) - Numéro(s) du (des) sceau(x) du conteneur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment - Expédition de faible valeur Instrument of International Trade - Instrument pour le commerce international	Flying Trucks - Expéditions aériennes transportées par camion Postal - Postales	Emergency Repairs - Réparations d'urgence

Figure 6-39 Highway Conveyance Document – Page 1



Conveyance Reference Number - Numéro de référence du moyen de transport
2471123456789

Trailer 1 Information – Information sur la remorque 1:			
Trailer Plate – Plaque d'immatriculation de la remorque : Iralplate1 Nova Scotia Canada		Trailer Identifier – Identificateur de la remorque :	
Trailer Seal Number(s) – Numéros du (des) sceau(x) de la remorque :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment – Expédition de faible valeur Instrument of International Trade – Instrument pour le commerce international	Flying Trucks – Expéditions aériennes transportées par camion Postal – Postales	Emergency Repairs – Réparations d'urgence
Container Identifier – Identificateur du conteneur :			
Container Seal Number(s) – Numéros du (des) sceau(x) du conteneur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment – Expédition de faible valeur Instrument of International Trade – Instrument pour le commerce international	Flying Trucks – Expéditions aériennes transportées par camion Postal – Postales	Emergency Repairs – Réparations d'urgence
Container Identifier – Identificateur du conteneur :			
Container Seal Number(s) – Numéros du (des) sceau(x) du conteneur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment – Expédition de faible valeur Instrument of International Trade – Instrument pour le commerce international	Flying Trucks – Expéditions aériennes transportées par camion Postal – Postales	Emergency Repairs – Réparations d'urgence
Container Identifier – Identificateur du conteneur :			
Container Seal Number(s) – Numéros du (des) sceau(x) du conteneur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment – Expédition de faible valeur Instrument of International Trade – Instrument pour le commerce international	Flying Trucks – Expéditions aériennes transportées par camion Postal – Postales	Emergency Repairs – Réparations d'urgence
Container Identifier – Identificateur du conteneur :			
Container Seal Number(s) – Numéros du (des) sceau(x) du conteneur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment – Expédition de faible valeur Instrument of International Trade – Instrument pour le commerce international	Flying Trucks – Expéditions aériennes transportées par camion Postal – Postales	Emergency Repairs – Réparations d'urgence
Container Identifier – Identificateur du conteneur :			
Container Seal Number(s) – Numéros du (des) sceau(x) du conteneur :			
Cargo Exceptions Exceptions du fret :	Courier Low Value Shipment – Expédition de faible valeur Instrument of International Trade – Instrument pour le commerce international	Flying Trucks – Expéditions aériennes transportées par camion Postal – Postales	Emergency Repairs – Réparations d'urgence

Figure 6-40 Highway Conveyance Document – Page 2



Conveyance Reference Number - Numéro de référence du moyen de transport
2471123456789

<p>Cargo Control Numbers - Numéros de contrôle du fret :</p> <p>Cargo Location : Tractor - Emplacement du fret : Tracteur : Tracplate1 Nova Scotia Canada</p>
<p>Cargo Location : Trailer - Emplacement du fret : Remorque : tralplate1 Nova Scotia Canada</p> <p>2471987654321</p>
<p>Cargo Location : Container - Emplacement du fret : Conteneur :</p>

Figure 6-41 Highway Conveyance Document – Page 3

- To download (save) the Highway Conveyance Document on your computer, select **Save**.



6.8.2 Printing/Downloading a Lead Sheet

To print a Lead Sheet, follow steps 1 through 4 in [section 6.8.1](#) of this Guide and select **Print/Download Lead Sheet** instead of **Print/Download Document** (see *Figure 6-37*).

The Portal-generated Lead Sheet includes a machine-readable bar code of the Conveyance Reference Number (CRN) as well as a list of all associated Cargo Control Numbers (CCN) (see *Figure 6-42*).

	<p>The lead sheet is a document with a machine-readable bar code which the carrier will be required to present at the First Port of Arrival (FPOA). The information provided on this document assists the CBSA in retrieving the advance commercial information you have submitted through the Portal. The lead sheet should contain either a bar-coded CRN, a bar-coded CCN with a handwritten CRN or a handwritten CRN if an alternate bar-coded document is also being presented with the lead sheet (e.g. PARS document with a bar-coded PARS number). The CBSA recommends you print the Portal generated Lead Sheet once your Highway Conveyance Document has reached Accepted Status.</p> <p>If the carrier chooses to produce their own bar codes, see Memorandum D3-1-1, available on the CBSA Web site, for bar code specifications.</p>
	<p>The option to generate a Lead Sheet is only available after a Highway Conveyance or Combined Highway Document is submitted to the CBSA. This option is available on the following pages in the Portal:</p> <ul style="list-style-type: none"> • The confirmation message page when a Highway Conveyance or Combined Highway Document is initially submitted to the CBSA (see <i>Figure 6-7</i>). • The confirmation page when a Highway Conveyance Document is resubmitted to the CBSA, after a Change or Amendment is made to the original Trade Document (see <i>Figure 6-33</i>). • On the General tab of a Submitted Conveyance Trade Document (see <i>Figure 6-37</i>).



Canada Border
Services Agency

Agence des services
frontaliers du Canada

**eManifest Portal
Lead Sheet**

**Portail du Manifeste électronique
Feuille maîtresse**

CBSA Proof of Report Preuve de déclaration de l'ASFC

Conveyance Reference Number Numéro de référence du moyen de transport :	2471123456789
--	---------------



Tractor Plate Plaque d'immatriculation du tracteur :	Tracplate1	Nova Scotia
Trailer Plate(s) Plaque(s) d'immatriculation de la remorque :	traiplate1	Nova Scotia
Submitted - Transmis :	2013-04-02 07:15	

Cargo Control Number(s) (CCN) – Numéro(s) de contrôle du fret (NCF) :

2471987654321

Figure 6-42 eManifest Portal Lead Sheet



6.9 Secondary Notices

This section outlines the information in regards to Secondary Notices (Manifest Forwards and Document Not on File notices).

- It is the user's responsibility to manage the Secondary Notices in their Business Account.

6.9.1 What are Secondary Notices?

Secondary Notices are Trade Document related notices that are forwarded to your attention on behalf of another Trade Chain Partner (Manifest Forward) or the CBSA (Document Not on File notices).

- Manifest Forward is an electronic copy of a House bill submitted to the CBSA, by a freight forwarder, which has been sent to your client identifier (carrier code).
- Document Not on File notice indicates that a Cargo Control Number containing your carrier code was quoted on a submitted Trade Document. This could be a Release or a House bill Close Message, but note that Document Not on File would not relate to a Conveyance quoting a CCN that is not on file.

6.9.2 Navigating the Secondary Notices Tab

This section contains figures and tables that provide an overview of the **Secondary Notices** tab, navigation features, the data that can be accessed and the available functions (*see Figure 6-43*).



Messages Trade Documents Lookups

Secondary Notices ?

Create Trade Document Search Submitted Trade Documents

Submitted Documents Draft Documents Secondary Notices

Search Secondary Notices

Filter list to view the following : All Secondary Notices Document Not on File Manifest Forward All Document Types House bill Refresh

Document Number	Document Type	Notice Date/Time	Status	Action
5472NOF20160912	-	2016-09-12 10:01	Document Not on File	Delete
5472CCNHELDTTEST220160808	-	2016-08-08 11:10	Document Not on File	Delete
5472CCNHELDTTEST120160808	-	2016-08-08 09:53	Document Not on File	Delete
5472CCNHELDTTEST120160805	-	2016-08-05 11:35	Document Not on File	Delete
8264HBADJUST20160804V3	House bill	2016-08-04 14:46	-	Delete
8264HBADJUST20160804V2	House bill	2016-08-04 14:27	-	Delete
8264HBADJUST20160804	House bill	2016-08-04 14:06	-	Delete

Customize List/Tab

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-43 Trade Documents tab – Secondary Notices tab

1	Search Secondary Notices	Allows you to search for a specific Secondary Notice. See Section 6.9.3 of this Guide for detailed procedures.
---	---------------------------------	--

Filtering Secondary Notices allows you to specify criteria which will narrow the type of Secondary Notices displayed in the list. The following table summarizes the filter options, the column headings for the different lists and the available functions.

Filter Secondary Notices (see Figure 6-43)		
	Filter Options	Description
2	All Secondary Notices	All Secondary Notice types will be displayed.
	Manifest Forwards	Only Manifest Forwards will be displayed.



	Document Not on File Notices	Only Document Not on File notices will be displayed.
3	All Document Types	Secondary Notices for all Document Types will be displayed.
	House bills	Only Secondary Notices for House bills will be displayed.

4	Refresh	Selecting Refresh generates and produces the requested filtered documents list.
---	----------------	--

Secondary Notices List (see <i>Figure 6-43</i>)		
	Column Headings	Description
5	Document Number	Selecting the Document Number from the list will open the Manifest Forwarded Trade Document (see <i>Figure 6-43, item 10</i>).
6	Document Type	The Document Type of the Secondary Notice. Note: A "-" is displayed if the Document Type is not known.
7	Notice Date/Time	The date and time the Secondary Notice was created.
8	Status	Selecting the Status from the list will open the Document Not on File notice (see <i>Figure 6-43, item 11</i>).
9	Action	Allows you to delete the Secondary Notice from the Secondary Notices list (see Section 6.9.5).
10	Manifest Forward link	Allows you to view the details of the Manifest Forwarded document (see <i>Figure 6-45</i>).
11	Status link	Allows you to view the details of the Document Not on File notice (see <i>Figure 6-46</i>).
12	Customize List/Tab	Allows you to customize the look of the page. See section 6.9.4 in this Guide for detailed procedures.

6.9.3 Searching Secondary Notices

This section outlines the different ways to search for a Secondary Notice.

The **Search Secondary Notices** function allows you to search for a specific Secondary Notice that has been sent to you. The Document number (CCN) is required and only exact matches of the number will be displayed.

	The full Document Number must be entered. If you enter only a partial Document Number, you will receive an error message. Only exact matches will be displayed.
--	---



	The Search Secondary Notices function only searches the Secondary Notices which are found in your Secondary Notices List. Deleted Secondary Notice(s) are permanently removed from the Secondary Notices list and are not included in the Search Secondary Notices function.
--	--

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select **Secondary Notices** tab.
2. Select **Search Secondary Notices** (see Figure 6-43 – item 1).
3. Enter the Document Number (CCN) of the Secondary Notice you want to find (see Figure 6-44).
4. Select **Search** (see Figure 6-44).

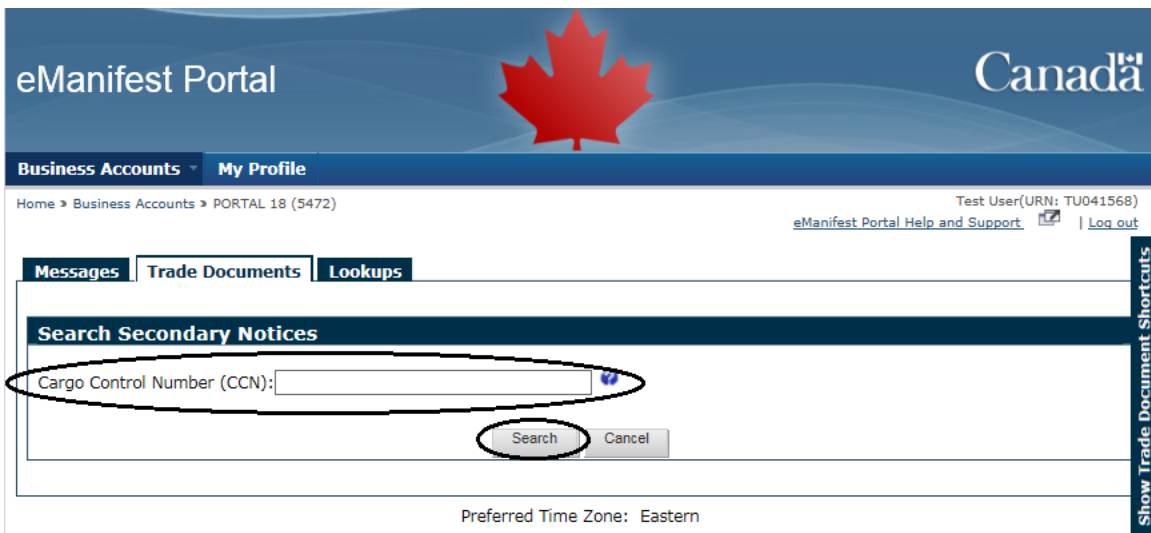


Figure 6-44 Trade Documents tab – Search Secondary Notices



- The matching Secondary Notice will be displayed, either a Manifest Forward (see Figure 6-45) or a Document Not on File notice (see Figure 6-46).

eManifest Portal

Canada

Business Accounts - My Profile

Home > Business Accounts > PORTAL 18 (5472)

Test User(URN: TU041568)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups

Secondary Notice - Manifest Forward

[Print/Download Document \(Select to view PDF size\)](#) Delete... < Back

Cargo Control Number (CCN): 8264HBADJUST20160804V3

General Ports Addresses Cargo Consolidation

Business to Business comments: -

Primary Cargo Control Number: 5472hbadjust20160804

Movement Type: Import

Mode Type: Highway

Containerized Goods

No Containers

Number	Container Identifier
Container List is empty	

Unique Consignment Reference (UCR) Number: -

Special Instructions: -

General Ports Addresses Cargo Consolidation

[Print/Download Document \(Select to view PDF size\)](#) Delete... < Back

Preferred Time Zone: Eastern

Figure 6-45 Trade Documents tab – Search Secondary Notices Search Results – Manifest Forward



Messages Trade Documents Lookups

Secondary Notice - Document Not on File Notice ?

Cargo Control Number (CCN): **5472NOF20160912**
 Document Type: -
 Carrier Name: **PORTAL 18**
 Carrier Code: **5472**
 Status: **Document Not on File (2016-09-12 10:01)**

Status History 1 - 1

Date/Time	Status	Message
2016-09-12 10:01	Document Not on File	This Document is Not on File.

Status History Details
[Top Of List](#)

Date/Time: 2016-09-12 10:01
 Status: Document Not on File
 Message: This Document is Not on File.
 Related Document Type: Pre-arrival Review System (PARS)
 Related Document Number: 2041200000362

Delete < Back

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-46 Trade Documents tab – Search Secondary Notices Search Results – Document Not on File notice



If no matching Secondary Notice is found, you can either change your search criteria or cancel the search.

6.9.4 Customizing the Secondary Notices List/Tab

You can change the number of documents displayed on the Secondary Notices list with the **Customize Secondary Notices List** function.



By default, 10 documents are displayed on each Secondary Notices page.

Start at:

Trade Documents tab.

1. Select the **Secondary Notices** sub-tab and then **Customize List/Tab** (see Figure 6-47).



Secondary Notices

Create Trade Document Search Submitted Trade Documents

Submitted Documents Draft Documents Secondary Notices

Search Secondary Notices

Filter list to view the following : All Secondary Notices All Document Types Refresh

Secondary Notices 1 - 7 of 7

Document Number	Document Type	Notice Date/Time	Status	Action
5472NOF20160912	-	2016-09-12 10:01	Document Not on File	Delete
5472CCNHLDTEST220160808	-	2016-08-08 11:10	Document Not on File	Delete
5472CCNHLDTEST120160808	-	2016-08-08 09:53	Document Not on File	Delete
5472CCNHLDTEST120160805	-	2016-08-05 11:35	Document Not on File	Delete
8264HBADJUST20160804V3	House bill	2016-08-04 14:46	-	Delete
8264HBADJUST20160804V2	House bill	2016-08-04 14:27	-	Delete
8264HBADJUST20160804	House bill	2016-08-04 14:06	-	Delete

Customize List/Tab

Preferred Time Zone: Eastern

Figure 6-47 Secondary Notices Tab

- 2. Under **Customize Secondary Notices List**, select the number (10, 25 or 50) of documents you want to be displayed (see Figure 6-48).



Customize List/Tab

Customize Secondary Notices List

Number of items to display per page: (dropdown menu with options 10, 25, 50)

Customize Trade Document Tab

Default Trade Document Sub-Tab: Submitted Documents (dropdown menu with options Submitted Documents, Draft Documents, Secondary Notices)

Default Submitted Documents List Filtering: All (dropdown menu) | Current (dropdown menu) | Highway Conveyance Document (dropdown menu)

Preferred Time Zone: Eastern

Figure 6-48 Trade Document tab – Customize Secondary Notices

3. Select **Save** (see Figure 6-48).
4. Select **OK** to save your customized settings.

You can customize the Trade Document sub-tab default in the **Trade Documents** tab with the **Customize Trade Document Tab** function.



By default, the **Submitted Documents** sub-tab will appear when selecting the **Trade Documents** tab.

Start at: Trade Documents tab.

1. From the **Secondary Notices** sub-tab, select **Customize List/Tab** (see Figure 6-43).
2. Under **Customize Trade Document** section, select the default sub-tab between: Submitted Documents, Draft Documents and Secondary Notices (see Figure 6-48).
3. Select **Save** (see Figure 6-48).
4. Select **OK** to save your customized settings.

You can customize the Submitted Documents list filtering default in the **Trade Documents** tab with the **Customize Trade Document Tab** function.

Start at: Trade Documents tab.

1. From the **Secondary Notices** sub-tab, select **Customize List/Tab** (see Figure 6-43).



2. Under **Customize Trade Document** section, select your default Submitted Documents List filtering preferences by selecting the:
 - Status;
 - Status (Current or Historical); and,
 - Trade Document type (Cargo document or Conveyance document) (see *Figure 6-48*).
3. Select **Save** (see *Figure 6-48*).
4. Select **OK** to save your customized settings.

6.9.5 Deleting a Secondary Notice

This section outlines how to delete a Secondary Notice.

The following example provides instructions for deleting a Manifest Forward (Secondary Notice).

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select the **Secondary Notices** sub-tab (see *Figure 6-49*).



Secondary Notices

Create Trade Document Search Submitted Trade Documents

Submitted Documents Draft Documents **Secondary Notices**

Search Secondary Notices

Filter list to view the following : All Secondary Notices All Document Types Refresh

Document Number	Document Type	Notice Date/Time	Status	Action
5472NOF20160912	-	2016-09-12 10:01	Document Not on File	Delete
5472CCNHLDTEST220160808	-	2016-08-08 11:10	Document Not on File	Delete
5472CCNHLDTEST120160808	-	2016-08-08 09:53	Document Not on File	Delete
5472CCNHLDTEST120160805	-	2016-08-05 11:35	Document Not on File	Delete
8264HBADJUST20160804V3	House bill	2016-08-04 14:46	-	Delete
8264HBADJUST20160804V2	House bill	2016-08-04 14:27	-	Delete
8264HBADJUST20160804	House bill	2016-08-04 14:06	-	Delete

Customize List/Tab

Preferred Time Zone: Eastern

Figure 6-49 Trade Document tab – Secondary Notices

- Under the Action column, select **Delete** aligned to the **Document Number** of the Manifest Forward you want to delete (see Figure 6-49).
- Select **Yes** to confirm your action (see Figure 6-50).

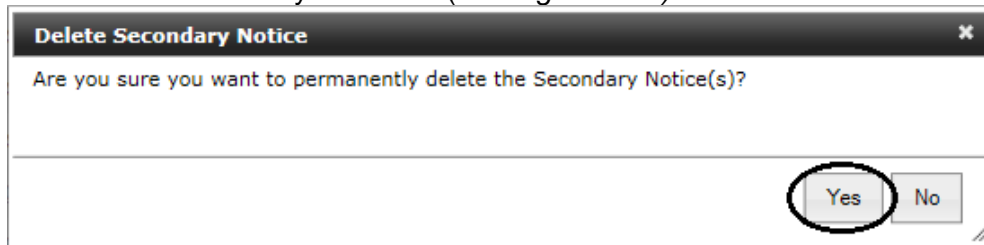


Figure 6-50 Trade Document tab – Delete Secondary Notice

- Select **OK** to delete your Secondary Notice.



7.0 Lookups




This section outlines how to create, search for and delete a Lookup.

A Lookup is a Portal feature designed to save time by allowing both highway carrier and freight forwarder Account Users to create and store frequently used information: Tractor, Trailer, Shipper, Consignee, Notify Party, Delivery Address and Trade Documents for highway carriers and Shipper, Consignee, Notify Party, Delivery Address, Consolidator, SNP ID and Trade Documents for freight forwarders. A Lookup can be created when you are working in a Trade Document, or within the **Lookup** tab.

For example, if you do business with the same Shipper on a regular basis, you can create a Lookup and recall their information (name, address, postal code, phone number, etc.) to avoid re-keying this information in future Trade Documents.

7.1 Types of Lookups

The **Lookups** tab contains multiple sub-tabs. Each sub-tab allows the Account User to create a new Lookup, edit, delete or search for an existing Lookup and/or display a list of previously created Lookups.

	The Search Lookups option will not be available if Lookups have not been created.
	All users within a Business Account can create, view and use Lookups created by any Account User within the Business Account.
	Each Business Account is limited to a maximum of 1,000 Lookups for the following types (i.e. Tractor, Trailer, Shipper, Consignee, Notify Party, Delivery Address, Consolidator and SNP). The maximum limit for Trade Document Lookups is 100.



The following table outlines the mandatory fields within each of the five different Lookup types.

Mandatory Fields	Highway Carrier Lookup Types						
	Tractor	Trailer	Shipper	Consignee	Notify Party	Delivery Address	Trade Document
Name	✓	✓	✓	✓	✓	✓	✓
Identifier	✓	✓					
Plate Number	✓	✓					
Province/State	✓	✓					
Country	✓	✓	✓	✓	✓	✓	
City			✓	✓	✓	✓	
Street Address			✓	✓	✓	✓	
Province/State and Postal/Zip Code (If Canada or USA)			✓	✓	✓	✓	

Mandatory Fields	Freight Forwarder Lookup Types						
	Shipper	Consignee	Notify Party	Delivery Address	Consolidator	SNP	Trade Document
Name	✓	✓	✓	✓	✓	✓	✓
Street Address	✓	✓	✓	✓	✓		
City	✓	✓	✓	✓	✓		
Country	✓	✓	✓	✓	✓		
Province/State and Postal/Zip Code (If Canada or USA)	✓	✓	✓	✓	✓		
Business Type						✓	
Client Identifier						✓	

	All fields within each tab are mandatory unless otherwise indicated.
--	--



Lookups ?

Tractor Trailer Addresses Trade Document

Shipper Consignee Notify Party Delivery Address

Create Shipper Lookup Search Shipper Lookups

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Shipper Lookups 1 - 1 of 1

Name (Company/Person) ▲	Address	City	Province/State
Shipping_company_no_1	123 Anywhere St	St.Stephen	New Brunswick

Show Trade Document Shortcuts

Preferred Time Zone: Eastern

Figure 7-1 Lookups tab



The **Search Lookups** option will only be available if Lookups have been created. If there are no Lookups, only the **Create Lookup** option will be available.



7.2 Creating a Lookup

This section outlines how to create a Lookup.

A Lookup can be created within the **Lookups** tab (see *Figure 7-1*), or when working in a Trade Document (see *Figure 6-2, item 6*).

7.2.1 Creating a Lookup from within the Lookups tab

Account Users can create Lookups for a Business Account before creating a Trade Document.

The following example provides instructions for creating a Trailer Lookup. The same process would be used to create any other Lookup (Tractor, Shipper, Consignee, Notify Party, Delivery address, Consolidator, SNP or Trade Document) within the **Lookups** tab.

Start at:	Lookups tab.
------------------	---------------------

1. Select the **Trailer** tab.
2. Select **Create Trailer Lookup** (see *Figure 7-2*).

The screenshot shows the eManifest Portal interface. The 'Lookups' tab is active, and the 'Trailer' sub-tab is selected. The 'Create Trailer Lookup' button is highlighted with a red circle. Below the button is a search field labeled 'Search Trailer Lookups' and an alphabetical index starting with '#'. Below the index, a table displays existing trailer lookups:

Trailer Lookup Name ▲	Trailer Identifier	Trailer Plate	Trailer Plate Province/State
look up 2		traiplate1	Nova Scotia
Trailer look up 1		trailerplate1	Nova Scotia

Preferred Time Zone: Eastern

Figure 7-2 Lookups tab – Trailer tab (Create Trailer Lookup)

3. Enter all mandatory information in the Lookup fields (see *Figure 7-3*).
4. Select **Create** (see *Figure 7-3*).



Create Trailer Lookup

All fields are mandatory unless otherwise specified.

Trailer Lookup Name:

Trailer Identifier (mandatory if available):

Trailer Plate:

Trailer Plate Country:

Trailer Plate Province/State:

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 7-3 Lookups tab – Create Trailer Lookup

5. A **Trailer Lookup Created** message will be displayed confirming that the Lookup has been created.
6. Select **OK**.

	<p>If the Lookup name that you entered already exists, a Lookup Name Already Exists message will be displayed.</p> <ol style="list-style-type: none"> 1. Select Yes to confirm that you want to use the same name. 2. Trailer Lookup Created message will be displayed. 3. Select OK.
	<p>Once 1,000 Lookups have been created for this Lookup type, a Maximum Lookup Limit Reached message will be displayed. You must delete an existing Trailer Lookup before creating another.</p> <ol style="list-style-type: none"> 1. Select OK. 2. Delete the Lookup that you no longer use. 3. Create a new Lookup.

7.2.2 Creating a Lookup when working in a Trade Document

Creating a Lookup while working in a Trade Document follows the same steps as creating a Lookup within the **Lookups** tab. See [section 6.3](#) of this Guide for details on creating Trade Documents.



The following example provides instructions for creating a Shipper Lookup. The same process would be used to create any other Lookup type except a Trade Document Lookup, see [section 7.3.3](#) for instructions on creating a Trade Document Lookup when in a Trade Document.

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select **Create Trade Document**.
2. Select **Highway Cargo Document**.
3. Select **Submit**.
4. Enter the Trade Document information.
5. Select **Addresses** tab.
6. Enter data in all mandatory fields in the **Shipper** section.
7. Select **Create a Shipper Lookup** (See *Figure 7-4*).
8. A Shipper Lookup Created message will be displayed confirming that the Lookup has been created.



9. Select **OK**.

eManifest Portal Canada

Business Accounts My Profile

Home » Business Accounts » PORTAL 17 (2471) Portal User(URN: PUC29479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Create Highway Cargo Document

Carrier Name: **PORTAL 17**
Carrier Code: **2471**

All fields are mandatory unless otherwise specified.

Cargo Control Number (CCN): **2471** 111222333

Complete all mandatory fields within the tabs below.

General Ports Addresses Cargo

Shipper

Enter Shipper Information below or [Select a Shipper Lookup](#)

Name (Company/Person): ABC Shipping

Address Line 1: 123 Ship St

Address Line 2 (optional):

Address Line 3 (optional):

City: Ottawa

Country: Canada

Province/State (Canada/USA locations only): Ontario

Postal/Zip Code (Canada/USA locations only): A1A 1A1

Contact Information (optional)

First Name:

Family Name:

Telephone Number:

Use the above information to [Create a Shipper Lookup](#)

[Notify Party \(mandatory if available\)](#)

[Delivery Address \(Mandatory if Delivery Address is different than Consignee Address.\)](#)

General Ports Addresses Cargo

Complete all mandatory fields within the tabs above.

[Check for Errors](#) [Save and Continue](#) [Save and Finish Later](#) [Submit to the CBSA](#)



[Print/Download Document \(PDF, 966KB\)](#) [Cancel](#)

Preferred Time Zone: Eastern

Figure 7-4 Trade Documents tab – Addresses tab (Shipper section, Create a Shipper Lookup)

10. The **Shipper Lookup** is created and you can continue creating your Trade Document.



	<p>If the Lookup name that you entered already exists, a Lookup Name Already Exists message will be displayed.</p> <ol style="list-style-type: none">1. Select Yes to confirm that you want to use the same name.2. Shipper Lookup Created message will be displayed.3. Select OK.4. Select No to stop the Lookup name from being duplicated.
	<p>Once 1,000 Lookups have been created for the Lookup type, a Maximum Lookup Limit Reached message will be displayed.</p> <ol style="list-style-type: none">1. Select OK.2. The Shipper Lookup list will be displayed with the following message: This Business Account has reached the limit of 1,000 Trailer Lookups. You must delete an existing Shipper Lookup before creating another.

7.2.3 Creating a Trade Document Lookup when submitting a Trade Document

You are able to create a Trade Document Lookup when submitting a Trade Document. You would use this function when you frequently send similar Trade Documents with the same information.

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select **Create Trade Document**.
2. Select **Trade Document** of choice.
3. Select **Submit**.
4. Enter the required information for your trade document submission (see [section 6.3.1](#)).
5. Select **Submit to the CBSA**.
6. Verify the information submitted is correct, select **Yes** if correct or **No** if any changes are required.



7. Select **Use submitted Highway Document information to create Trade Document Lookup** (see *Figure 7-5*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages Trade Documents **Lookups** User Access

Submitted to the CBSA

Your Highway Conveyance Document has been submitted to the CBSA.

Conveyance Reference Number (CRN): **2471LOOKUPEXAMPLE**
Submitted Date/Time: **2013-04-17 07:30**

Note: An optional Lead Sheet is provided to you from the CBSA. You can access this Lead Sheet by selecting the Print/Download Lead Sheet below. You must present either the eManifest Portal Lead Sheet or your own bar-coded document to the Border Services Officer upon arrival in Canada.

[Print/Download Lead Sheet \(PDF, 885KB\)](#)
[Print/Download Document \(PDF, 1034KB\)](#)
[Use submitted Highway Conveyance Document information to create Trade Document Lookup](#)

Trade Document Lookup Name:

Preferred Time Zone: Eastern

Figure 7-5 Trade Documents tab – Create a Lookup from a submitted Trade Document

8. Enter a Lookup name.
9. Select **Create Lookup** (see *figure 7-5*).
10. A confirmation message will appear to let you know that a new Lookup has been created.
11. Select **OK**.



7.3 Searching for and using a Lookup

This section outlines how to search for and use Lookups.

Searching for a Lookup is useful in the following instances:

- using a Lookup in a Trade Document;
- updating the details of a Lookup; and/or
- deleting a Lookup.

You can search for a Lookup in the **Lookups** tab (see *Figure 7-1*), or when creating a Trade Document (see *Figure 6-2, item 5*).

7.3.1 Searching for Lookups Criteria

The following table outlines the information fields that can be used to search all the different Lookup types. For example, if you are looking for a Shipper Lookup, you can filter and sort the existing list by: Name, City, or Province/State.

The Lookup search criteria do not have to be an exact spelling to the saved Lookup name. For example, searching with letter “S” will return all Lookups starting with the letter “S”.

Fields	Highway Carrier Lookup Types					
	Tractor	Trailer	Shipper	Consignee	Notify Party	Delivery Address
Name	✓	✓	✓	✓	✓	✓
Identifier	✓	✓				
Plate Number	✓	✓				
Province/State	✓	✓	✓	✓	✓	✓
City			✓	✓	✓	✓

Fields	Freight Forwarder Lookup Types					
	Shipper	Consignee	Notify Party	Delivery Address	Consolidator	SNP
Name	✓	✓	✓	✓	✓	✓
Province/State	✓	✓	✓	✓	✓	
City	✓	✓	✓	✓	✓	
Number of SNP ID's						✓



7.3.2 From the Lookups tab

The following example provides instructions on searching for a Consignee Lookup. The process is the same to search any other Lookup (Tractor, Trailer, Shipper, Notify Party, Delivery Address, Consolidator and SNP).

Start at:	Lookups tab.
------------------	---------------------

1. Select the **Addresses** tab.
2. Select the **Consignee** sub-tab.
3. Select the **Search Consignee Lookups** field, enter the name of the Consignee you want to find under “Search for:” (see *Figure 7-6*).
4. Select **Search** (see *Figure 7-6*).



Figure 7-6 Lookups tab – Search Consignee Lookups

5. The results of the search Consignee Lookups will be displayed.



- Select the appropriate Consignee Lookup from the available list (see *Figure 7-7*). Should no similar company exist, you will be brought directly to the Consignee Lookup Details page.

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, user information is displayed: 'Portal User(URN: PU029479)' and 'eManifest Portal Help and Support | Log out'. The main content area has tabs for 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Lookups' tab is active, showing a search box with 'Name (Company/Person): c' and a filter menu with characters '# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. Below the search box, it says 'Consignee Lookups 1 - 2 of 2'. A table displays the results:

<u>Name (Company/Person) ▲</u>	<u>Address</u>	<u>City</u>	<u>Province/State</u>
<u>Consignee no 1</u>	123 Nowhere St	Ottawa	New Brunswick
<u>Consignee no 2</u>	321 Everywhere St	Ottawa	Ontario

At the bottom of the search results, there are buttons for 'New Search', 'Modify Search', and 'Cancel'. Below the table, it indicates 'Preferred Time Zone: Eastern'. A vertical sidebar on the right contains the text 'Show Trade Document Shortcuts'.

Figure 7-7 Lookups tab – Consignee Lookup Search Results

	Selecting any of the underlined column headings will sort the list using the information in that column.
	The alpha/numeric characters available can be used to display any/all Lookup Names starting with the selected letter or number.



7.3.3 Using a Lookup While Working in a Trade Document

The following example provides instructions for using the Shipper Lookup while creating a Combined Highway Document. The process is the same for using any other Lookup (Tractor, Trailer, Consignee, Notify Party, Delivery Address, Consolidator and SNP) in any of the following Trade Document types: Conveyance, Cargo, Combined or House bill.

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select **Create Trade Document**.
2. Select **Combined Highway Document**.
3. Select the **Addresses** tab.
4. Select a **Select a Shipper Lookup** in the **Shipper** section to find a Lookup to use within this Trade Document (see *Figure 7-8*).



Create Combined Highway Document

Carrier Name: PORTAL 17
Carrier Code: 2471

All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): 2471

Cargo Control Number (CCN): 2471

Complete all mandatory fields within the tabs below.

Shipper

Enter Shipper Information below or **Select a Shipper Lookup**

Name (Company/Person):

Address Line 1:

Address Line 2 (optional):

Address Line 3 (optional):

City:

Country: - Select Country -

Province/State (Canada/USA locations only): - Select Provincial/State -

Postal/Zip Code (Canada/USA locations only):

Contact Information (optional)

First Name:

Family Name:

Telephone Number:

Use the above information to **Create a Shipper Lookup**

Completed

[Notify Party \(mandatory if available\)](#)

[Delivery Address \(Mandatory if Delivery Address is different than Consignee Address.\)](#)

Complete all mandatory fields within the tabs above.

Check for Errors **Save and Continue** **Save and Finish Later** **Submit to the CBSA**

[Print/Download Document \(PDF, 2000KB\)](#) **Cancel**

Preferred Time Zone: Eastern

Figure 7-8 Trade Documents tab – Create Combined Highway Document (Select Shipper Lookup)

- 5. The Select a Shipper Lookup page will be displayed.



6. Select the appropriate Lookup from the available list or use the **Search Shipper Lookups** option (see *Figure 7-9*).

eManifest Portal  Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Select a Shipper Lookup ?

Search Shipper Lookups

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Shipper Lookups 1 - 2 of 2

Select	Name (Company/Person) ▲	Address	City	Province/State
<input checked="" type="radio"/>	Shippers International	100 International Dr	Montreal	Quebec
<input type="radio"/>	Shipping company no 1	123 Anywhere St	St.Stephen	New Brunswick


Select Cancel

Preferred Time Zone: Eastern

Figure 7-9 Trade Documents tab – Shipper Lookup Search Results





- The information from the selected Lookup will be displayed in the Shipper fields (see Figure 7-10).

eManifest Portal  Canada

Business Accounts ▾ My Profile

Home » Business Accounts » PORTAL 17 (2471)

Portal User (URN: PU029479) [eManifest Portal Help and Support](#)   [Logout](#)

Messages Trade Documents Lookups User Access

Create Combined Highway Document ?

Carrier Name: **PORTAL 17**
Carrier Code: **2471**

All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): **2471**

Cargo Control Number (CCN): **2471**

Complete all mandatory fields within the tabs below.

General Ports Tractor Trailer Addresses **Cargo**

Shipper

Enter Shipper Information below or

Name (Company/Person):

Address Line 1:

Address Line 2 (optional):

Address Line 3 (optional):

City:

Country:

Province/State (Canada/USA locations only):

Postal/Zip Code (Canada/USA locations only):

Contact Information (optional)

First Name:

Family Name:

Telephone Number:

Use the above information to

Compliance

[Notify Party \(mandatory if available\)](#)

[Delivery Address \(Mandatory if Delivery Address is different than Consignee Address.\)](#)

General Ports Tractor Trailer Addresses **Cargo**

Complete all mandatory fields within the tabs above.

[Print/Download Document \(PDF, 200KB\)](#)

Preferred Time Zone: Eastern

Figure 7-10 Trade Documents tab – Shipper Information Populated by Selected Lookup



7.3.4 Using a Trade Document Lookup to create a Trade Document

The following example provides instructions for using the Trade Document Lookup to create a Combined Highway Document.

Start at:	Trade Documents tab.
------------------	-----------------------------

1. Select **Create Trade Document**.
2. Select **Use Trade Document Lookup**.
3. Select **Submit** (see *Figure 7-11*).

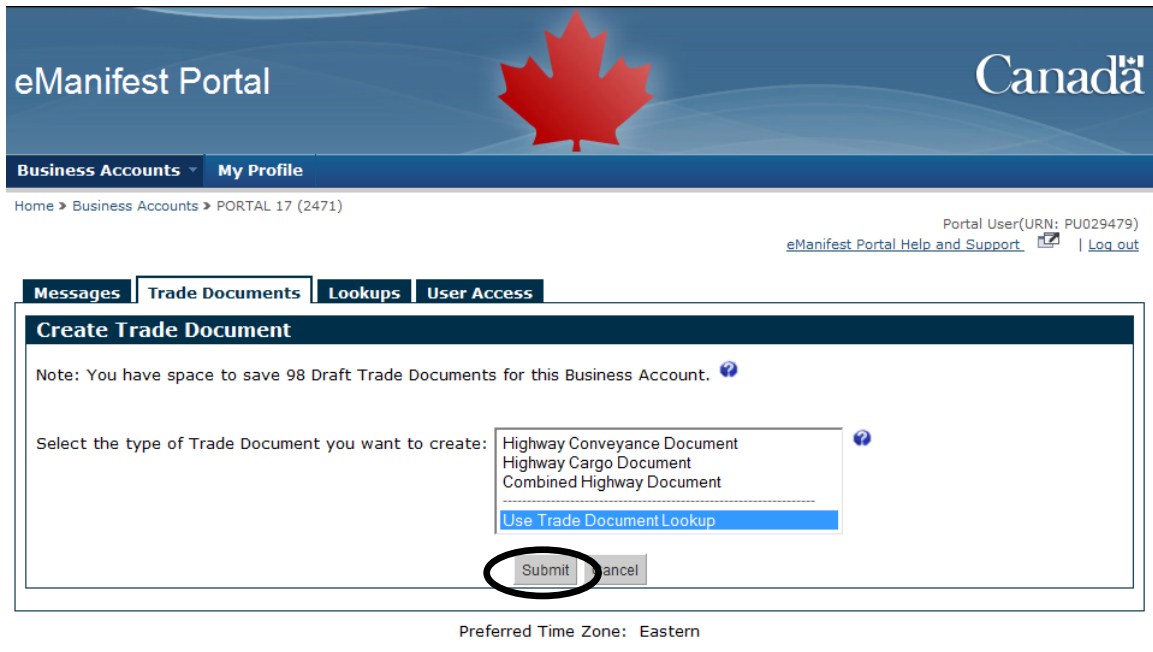


Figure 7-11 Use Trade Documents Lookup



4. Select the Trade Document Lookup you would like to use and select **Select** (See *Figure 7-12*).

eManifest Portal Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471) Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Messages Trade Documents Lookups User Access

Create Trade Document

Use Trade Document Lookup

Filter your Trade Document Lookups list to view the following: All Trade Document Lookups Refresh

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Trade Document Lookups 1 - 3 of 3

Select	Trade Document Lookup Name ▲	Document Type
<input checked="" type="radio"/>	Combined example	Combined Highway Document
<input type="radio"/>	Conveyance look up 1	Highway Conveyance Document
<input type="radio"/>	TD look up	Highway Conveyance Document

Preferred Time Zone: Eastern

Figure 7-12 Select Trade Documents Lookup

5. Enter the **CRN, CCN, Estimated Date of Arrival** and **Estimated Time and Time Zone of Arrival** and any other missing mandatory elements (See *Figure 7-13*).
6. Select each of the tabs to verify that the information is complete and valid. Make any changes needed (See *Figure 7-13*).
7. Select **Submit to the CBSA** (See *Figure 7-13*).



Create Combined Highway Document

Carrier Name: PORTAL 17
Carrier Code: 2471

All fields are mandatory unless otherwise specified.

Conveyance Reference Number (CRN): 2471

Consign Control Number (CCN): 2471

Complete all mandatory fields with the tabs below.

General | Ports | Tractor | Trailer | Addresses | Cargo

Estimated Date of Arrival: (YYYYMMDD)

Estimated Time and Time Zone of Arrival (hh:mm) : Eastern

Is this a CSA Shipment?

CSA Shipment: No

If yes, enter the Business Number of the CSA approved Importer:

Consolidation Indicator: No

Ocean Bill of Lading (optional):

Unique Consignment Reference (UCR) Number (optional):

Cargo Location: Tractor | **Trailer** | Container

General | Ports | Tractor | Trailer | Addresses | Cargo

Complete all mandatory fields with the tabs above.

[Print/Download Document \(PDF, 0KB\)](#)

Preferred Time Zone: Eastern

Figure 7-13 Use Trade Documents Lookup

7.4 Editing a Lookup



This section outlines how to edit a previously created Lookup. To find a previously created Lookup, refer to [section 7.3](#) in this Guide.

The following example provides instructions for editing the Tractor Lookup. The process is the same for any other Lookup (Trailer, Shipper, Consignee and Notify Party, Delivery Address, SNP or Trade Document).

Start at:	Lookups tab.
------------------	---------------------

1. Select **Tractor** tab.
2. Select the Lookup you want to edit (see *Figure 7-14*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below that, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, it says 'Portal User(URN: PU029479)' and provides links for 'eManifest Portal Help and Support' and 'Log out'. The main content area has tabs for 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Lookups' tab is active, and within it, the 'Tractor' sub-tab is selected. There are buttons for 'Create Tractor Lookup' and 'Search Tractor Lookups', along with an alphabetical index '# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. Below this, it says 'Tractor Lookups 1 - 2 of 2'. A table displays the following data:

Tractor Lookup Name ▲	Tractor Identifier	Tractor Plate	Tractor Plate Province/State
Look up 1		Tractorplate1	Nova Scotia
Look up 2		Newplate	Nova Scotia

At the bottom of the page, it indicates 'Preferred Time Zone: Eastern'. A vertical sidebar on the right contains the text 'Show Trade Document Shortcuts'.

Figure 7-14 Lookups tab – Tractor sub-tab

3. The Tractor Lookup Details page will be displayed.



4. Select **Edit** (see *Figure 7-15*).

The screenshot shows the eManifest Portal interface. At the top, there is a blue header with the 'eManifest Portal' logo on the left and the 'Canada' logo on the right. Below the header is a navigation bar with 'Business Accounts' and 'My Profile'. The main content area has a breadcrumb trail: 'Home > Business Accounts > PORTAL 17 (2471)'. On the right side, there is user information: 'Portal User(URN: PU029479)', 'eManifest Portal Help and Support', and 'Log out'. Below this is a tabbed interface with 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Lookups' tab is active, showing 'Tractor Lookup Details'. The details include: 'Tractor Lookup Name: Look up 2', 'Tractor Identifier:', 'Tractor Plate: Newplate', 'Tractor Plate Province/State: Nova Scotia', and 'Tractor Plate Country: Canada'. At the bottom of the details box are three buttons: 'Edit', 'Delete', and '<< Back'. The 'Edit' button is circled in red. Below the details box, it says 'Preferred Time Zone: Eastern'. On the right edge of the screenshot, there is a vertical label 'Show Trade Document Shortcuts'.

Figure 7-15 Lookups tab – Tractor Lookup Details

5. Edit Tractor Lookup information and select **Submit** (see *Figure 7-16*).



Information edited within the Lookup will not be saved if the **Cancel** option is selected.

The screenshot shows the eManifest Portal interface, similar to Figure 7-15. The 'Lookups' tab is active, showing the 'Edit Tractor Lookup' form. At the top of the form, it says 'All fields are mandatory unless otherwise specified.' The form fields are: 'Tractor Lookup Name: Look up 2', 'Tractor Identifier (mandatory if available):', 'Tractor Plate: Newplate 2', 'Tractor Plate Country: Canada', and 'Tractor Plate Province/State: Nova Scotia'. At the bottom of the form are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is circled in red. Below the form, it says 'Preferred Time Zone: Eastern'. On the right edge of the screenshot, there is a vertical label 'Show Trade Document Shortcuts'.

Figure 7-16 Lookups tab – Edit Tractor Lookup

6. A Tractor Lookup Updated message will be displayed confirming that the Lookup has been updated.
7. Select **OK**.



7.5 Deleting a Lookup

This section provides instructions for deleting a previously created Lookup. To find a previously saved Lookup, refer to [section 7.4](#) in this Guide.

The following example provides instructions for deleting a Tractor Lookup. The process is the same for any other Lookup (Trailer, Shipper, Consignee, Delivery Address, Notify Party, Consolidator, SNP and Trade Documents).

Start at:	Lookups tab.
------------------	---------------------

1. Select **Tractor** tab.
2. Select the Lookup you want to delete (see *Figure 7-14*).
3. The Tractor Lookup Details page will be displayed.



Figure 7-17 Lookups tab – Tractor Lookup Details

4. Select **Delete** (see *Figure 7-17*).
5. A Delete Tractor Lookup message will be displayed prompting you to confirm that you want to delete the Lookup.
6. Select **Yes** to continue or **No** to cancel deleting the Lookup (see *Figure 7-18*).



Figure 7-18 Lookups tab – Delete Tractor Lookup



8.0 Updating Profile Information

This section outlines how to update the Account User and Account Owner information.

Whenever there is a change to your personal information (i.e. name, telephone number, e-mail address, etc.), you are required to make these changes in your **My Profile**.

You are responsible for keeping your Profile information up to date.

8.1 Updating User Account Profile Information

This section outlines the steps for updating your profile information.

Start at:	eManifest Portal.
------------------	-------------------

1. Select **My Profile** in the top menu bar (see *Figure 8-1*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile' (circled in red). Below this, there are tabs for 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Trade Documents' section is active, showing a table of Submitted Documents. The table has the following data:

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Status
ZZZ798978764987564586543	2007-04-30 15:00 ET	8	2007-04-30 12:45	Updating...
ZZZ7977287456475	2007-04-30 13:00 MT	4	2007-04-30 02:45	Accepted
ZZZ7875638929592355622362	2007-04-30 05:45 ET	11	2007-04-30 02:34	Reported

Figure 8-1 Updating Profile Information



2. The My Profile page will be displayed.
3. Select **Edit** (see *Figure 8-2*).

eManifest Portal Canada

Business Accounts ▾ My Profile

Home > My Profile Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

My Profile

User Reference Number (URN): **PU029479**

Credential Provider: **GC Key** [Change Credential Provider...](#)

Personal Information

First Name: **Portal**
Last Name: **User**
E-mail Address: **portal_shared_secret_portail_secret_partage@cbsa-asfc.gc.ca**
Telephone Number: **6135555555**
Telephone Extension:
Preferred Time Zone: **Eastern**
Preferred Language of Correspondence: **English**

Edit

Delete User Account

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 8-2 My Profile - Edit



4. Edit the information as needed.
5. Select **Save** to save the changes or **Cancel** saving the changes (see *Figure 8-3*).

Figure 8-3 Edit My Profile – Edit Profile Information

6. A **My Profile Updated** message will be displayed confirming that your profile has been updated.
7. Select **OK**.

	Updated profile information is displayed on My Profile page.
--	--

8.2 Deleting a User Account

This section outlines the steps to delete your User Account.

Start at:	eManifest Portal.
------------------	-------------------

1. Select **My Profile** in the top menu bar (see *Figure 8-1*).
2. The My Profile page will be displayed (see *Figure 8-2*).
3. Select **Delete User Account...**
4. A User Account Deletion confirmation message will appear, select **Yes** (see *Figure 8-4*).



Delete User Account ✕

Are you sure you want to permanently delete your User Account?

You will no longer have access to the eManifest Portal and the following Business Accounts:

PORTAL 17(2471), PORTAL 18(5472), PORTAL FREIGHT FORWARDER 3(8666)

Figure 8-4 Edit My Profile – Delete User Account

5. A User Account Deleted page will be displayed confirming that your User Account has been deleted.
6. An e-mail will be sent to the user's e-mail address to confirm the User Account deletion.
7. Select **OK** and your eManifest Portal session will end.



9.0 Managing User Accounts

This section outlines how to edit the role of an Account User, and the steps to suspend or remove Account Users associated with your Business Account.

Only Account Owners or Proxy Account Owners will be able to perform these administrative functions.

9.1 Editing an Account User Role

This section outlines the steps to edit the role of an Account User associated with your Business Account. To modify the Account Owner of a Business Account, the Business Contact will need to contact the Technical Commercial Client Unit (TCCU) by telephone, see the [eManifest Portal - Frequently Asked Questions \(FAQs\)](#) addressed to your company type. For more information on user roles, see [section 2.5.4](#) of this Guide.

Start at: eManifest Portal.

1. Select **User Access** tab (see *Figure 9-1*).
2. A list of all Account Users will be displayed, including their assigned user role and user status. The list of Account Users is sorted alphabetically by default.
3. If the Account User you are looking for is not displayed, select the first letter of the Account User's family name to see a list of all Account Users whose family name begins with the same letter.
4. Select the User (see *Figure 9-1*).

The screenshot shows the eManifest Portal interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, there is a user identification section: 'Portal User(URN: PU029479)', 'eManifest Portal Help and Support', and 'Log out'. A secondary navigation bar contains 'Messages', 'Trade Documents', 'Lookups', and 'User Access', with 'User Access' being the active and circled tab. Below this, there is a table titled 'User Access' with an 'Add User' button and an alphabetical filter '# A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'. The table shows two users: 'John james' (Account User) and 'Portal' (Account Owner). The 'Portal' user row has a 'User' link circled. At the bottom, it says 'Preferred Time Zone: Eastern'.

Family Name ▲	First Name	URN	User Role	User Status
John	james	JD411833	Account User	Active
Portal		PU029479	Account Owner	Active

Figure 9-1 User Access tab – User Access (Account Users)

5. Select **Edit** (see *Figure 9-2*).



User Details

Family Name: **Doe**
First Name: **John james**
User Reference Number (URN): **JD411833**
E-mail Address: **portal_shared_secret-portal_secret_partage@cbsa-asfc.gc.ca**
Telephone Number: **9999999999**
Telephone Extension: **214**

User Role And Status

User Role: **Account User**
User Status: **Active**

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 9-2 User Access tab – User Details (Edit)

6. Edit the Account User Role and/or the User Status (see Figure 9-3).



7. Select **Submit** (see *Figure 9-3*).

The screenshot displays the 'eManifest Portal' interface. At the top, there is a header with the 'Canada' logo and a red maple leaf. Below the header, a navigation bar shows 'Business Accounts' and 'My Profile'. The main content area is titled 'Edit User Role and Status' for user 'Doe, John james'. It features two dropdown menus: 'User Role' with options 'Account Browser', 'Account User', and 'Proxy Account Owner' (the last one is selected); and 'User Status' with options 'Active' and 'Suspended' (the first one is selected). A 'Submit' button and a 'Cancel' button are located at the bottom of the form. The 'Submit' button is circled in black. The page also includes a sidebar on the right labeled 'Show Trade Document Shortcuts' and a footer indicating 'Preferred Time Zone: Eastern'.

Figure 9-3 User Access tab – Edit User Role

8. A **User Profile Updated** message will be displayed confirming the User Role and Status has been updated.
9. Select **OK**.



9.2 Suspending an Account User

This section outlines the steps to Suspend an Account User associated with your Business Account.

Start at: eManifest Portal.

1. Select **User Access** tab.
2. Select the **User** (see *Figure 9-1*).
3. Select **Edit** (see *Figure 9-4*).

The screenshot shows the eManifest Portal interface. At the top, there are navigation tabs for 'Business Accounts' and 'My Profile'. Below this, the breadcrumb path is 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, there is a user identification section: 'Portal User(URN: PU029479)', 'eManifest Portal Help and Support', and 'Log out'. The main content area has a tabbed interface with 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'User Access' tab is active, displaying 'User Details' for a user named John James Doe. The details include: Family Name: Doe, First Name: John james, User Reference Number (URN): JD411833, E-mail Address: portal_shared_secret-portail_secret_partage@cbsa-asfc.gc.ca, Telephone Number: 9999999999, and Telephone Extension: 214. Below these details is a section titled 'User Role And Status' showing 'User Role: Account User' and 'User Status: Active'. At the bottom of this section, there is an 'Edit' button circled in black. Below the 'Edit' button are 'Remove ...' and '< Back' buttons. At the very bottom of the page, it says 'Preferred Time Zone: Eastern'. On the right side of the screenshot, there is a vertical label 'Show Trade Document Shortcuts'.

Figure 9-4 User Access tab – User Details (Modify)



4. Select **Suspended** as the User Status (see *Figure 9-5*).

Preferred Time Zone: Eastern

Figure 9-5 User Access tab – Edit User Role and Status (Suspend)

5. Select **Submit** (see *Figure 9-5*).
6. A User Profile Updated message will be displayed confirming the User Role and Status has been updated.
7. Select **OK**.
8. The Account User role will be displayed as suspended (see *Figure 9-6*).

Family Name ▲	First Name	URN	User Role	User Status
Doe	John james	JD411833	Proxy Account Owner	Suspended
User	Portal	PU029479	Account Owner	Active

Preferred Time Zone: Eastern

Figure 9-6 User Access tab – Suspend User (User Role Suspended)



9.3 Removing an Account User

This section outlines the steps to remove an Account User associated with your Business Account.

Once an Account User has been removed from a Business Account, they will no longer have access to the Business Account and their association with that Business Account will be severed. The Account User's own Portal profile will remain unchanged and the user will still have access to other authorized business accounts.

Start at: eManifest Portal.

1. Select **User Access** tab.
2. Select the User (see *Figure 9-1*).
3. Select **Remove** (see *Figure 9-7*).

The screenshot shows the eManifest Portal interface. At the top, there is a blue header with the eManifest Portal logo and the word 'Canada' next to a red maple leaf. Below the header, there is a navigation bar with 'Business Accounts' and 'My Profile' tabs. The main content area is titled 'User Access' and contains a 'User Details' section. The user details include: Family Name: Doe, First Name: John james, User Reference Number (URN): JD411833, E-mail Address: portal_shared_secret-portail_secret_partage@cbsa-asfc.gc.ca, Telephone Number: 9999999999, Telephone Extension: 214, User Role: Proxy Account Owner, and User Status: Suspended. There are two buttons at the bottom of the user details section: 'Edit' and 'Remove ...'. The 'Remove ...' button is circled in red. Below the buttons, it says 'Preferred Time Zone: Eastern'. On the right side of the page, there is a vertical sidebar with the text 'Show Trade Document Shortcuts'.

Figure 9-7 User Access tab – User Details (Remove)

4. A Remove User message will be displayed prompting you to confirm that you want to remove the user (see *Figure 9-8*).
5. Select **Yes** to remove the Account User or **No** to cancel removing the Account User (see *Figure 9-8*).



Remove User

Are you sure you want to remove Doe, John james from Business Account PORTAL 17?

Figure 9-8 User Access tab – User Details (Remove User)

- The User Account is successfully removed and will no longer be displayed in the User Access list (see Figure 9-9).

eManifest Portal



Canada

Business Accounts | My Profile

Home > Business Accounts > PORTAL 17 (2471)

Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Messages | Trade Documents | Lookups | **User Access**

User Access

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Users 1 - 1 of 1

Family Name ▲	First Name	URN	User Role	User Status
User	Portal	PU029479	Account Owner	Active

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 9-9 User Access tab – User Access (Account User Removed)



10.0 Managing Business Accounts

This section outlines how to edit the Account Owner or Business Account Information and how to delete the Business Account.

Only Account Owners will be able to perform these administrative functions.

10.1 Updating Business Account Information

This section outlines how to update the Account Owner and Business Account information. All updates made to the Business Account information will be sent to the CBSA to be verified before the information is updated in the Portal. You will receive an e-mail when the updates have been processed by the CBSA.

10.1.1 Edit the Account Owner Information

Start at:	eManifest Portal.
------------------	-------------------

1. Select **Business Accounts** in the top menu bar.
2. Select **Modify** from the Action column next to the Business Account you want to update (see *Figure 10-1*).

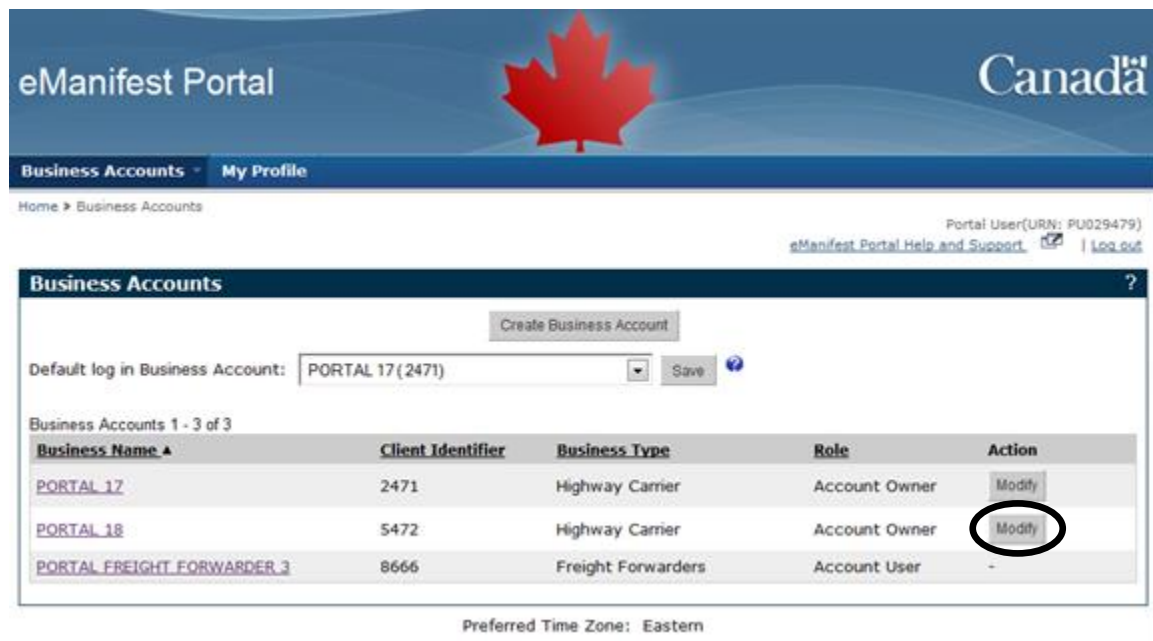


Figure 10-1 Business Accounts – Updating Business Account Information

3. The Modify Business Account page will be displayed which will default to the Account Owner Information page.



4. Select **Modify** (see *Figure 10-2*).

The screenshot displays the 'eManifest Portal' interface. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 18 (5472) Modify Business Account'. The user is identified as 'Portal User(URN: PU029479)' with links for 'eManifest Portal Help and Support' and 'Log out'. The main content area is titled 'Modify Business Account' and contains two tabs: 'Account Owner Information' (selected) and 'Business Information'. The 'Account Owner Information' tab displays the following details:

- First Name: **Portal**
- Family Name: **User**
- Position Title: **Owner**
- E-mail Address: **tracy.perkins@cbsa-asfc.gc.ca**
- Telephone Number: **6135555555**
- Telephone Extension:
- Fax Number:
- Address: **Ottawa, Ontario**
- City: **Ottawa**
- Country: **Canada**
- Province/State: **Ontario**
- Postal/Zip Code: **A1A 1A1**

An **Edit** button is circled in red at the bottom of the form. Below the form are buttons for 'Delete Business Account' and '< Back'. At the bottom of the page, it states 'Preferred Time Zone: Eastern'. A vertical sidebar on the right contains the text 'Show Trade Document Shortcuts'.

Figure 10-2 Business Accounts – Account Owner Information tab



5. Update the required information and select **Save** (see *Figure 10-3*).

Figure 10-3 Business Accounts – Editing Account Owner Information

6. A confirmation message will appear, select **OK**.

10.1.2 Edit the Business Account Information

Start at:	eManifest Portal.
------------------	-------------------

1. Select **Business Accounts** in the top menu bar.
2. Select **Modify** from the Action column next to the Business Account you want to update (see *Figure 10-1*).
3. The Modify Business Account page will be displayed.
4. Select the **Business Information** tab (see *Figure 10-4*).



PORTAL 18(5472)

Modify Business Account

Account Owner Information

Business Information

Business Name: **PORTAL 18**

Client Identifier: **5472**

Business Type: **Highway Carrier**

Business Information

Contact First Name: **Portal**

Contact Family name: **User**

Contact Telephone Number: **1234567890**

Contact Telephone Extension:

Address | Telephone Number: **250 TREMBLAY RD**

City: **OTTAWA**

Country: **Canada**

Province/State: **Ontario**

Postal/Zip Code: **K1A0L8**

Preferred Time Zone: Eastern

Version: 2013-03-27

Show Trade Document Shortcuts

Figure 10-4 Business Accounts – Request Business Account Update

5. Select **Request Update**.



6. Update the required information and select **Submit** (see *Figure 10-5*).

Business Accounts My Profile

Home > Business Accounts > PORTAL 18 (5472) Modify Business Account

Portal User(URN: PU029479)
[eManifest Portal Help and Support](#) | [Log out](#)

Request Update to Business Information

Request Update to Business Information ?

All fields are mandatory unless otherwise specified.

Contact First Name:

Contact Family name:

Contact Telephone Number:

Contact Telephone Extension (optional):

Address | Telephone Number:

City:

Country:

Province/State (Canada/USA locations only):

Postal/Zip Code (Canada/USA locations only):

Preferred Time Zone: Eastern

Figure 10-5 Business Accounts – Request Business Account Update

7. A confirmation message will appear, select **OK**.



The Business Information **Updates Submitted** screen indicates that you will receive an e-mail once your request has been processed.



10.2 Setting a Default Business Account

This section outlines the steps for setting one Business Account as the default in cases when you are managing several Business Accounts.

Start at:	eManifest Portal.
------------------	-------------------

1. Select **Business Accounts** (see *Figure 10-6*).

Business Name	ID	Type	Role	Action
PORTAL 17	2471	Highway Carrier	Account Owner	Modify
PORTAL 18	5472	Highway Carrier	Account Owner	Modify
PORTAL FREIGHT FORWARDER 3	8666	Freight Forwarders	Account User	-

Figure 10-6 Business Accounts – Default log in Business Account

2. Select the default Business Account from the drop-down list and select **Save** (see *Figure 10-6*).
3. A Default Log In Preference Updated message will be displayed confirming the default Business Account has been updated.
4. Select **OK**.



10.3 Deleting a Business Account

This section outlines the steps to delete your Business Account.

Start at: eManifest Portal Home page.

1. Select **Modify** under the Action column next to the Business Account you want to delete (see *Figure 10-7*).

The screenshot displays the 'Business Accounts' page in the eManifest Portal. At the top, there is a navigation bar with 'Business Accounts' and 'My Profile'. Below this, a breadcrumb trail shows 'Home > Business Accounts'. The page includes a 'Create Business Account' button and a dropdown menu for the 'Default log in Business Account' set to 'PORTAL 17 (2471)'. A table lists three business accounts:

Business Name ▲	Client Identifier	Business Type	Role	Action
PORTAL_17	2471	Highway Carrier	Account Owner	Modify
PORTAL_18	5472	Highway Carrier	Account Owner	Modify
PORTAL_FREIGHT_FORWARDER_3	8666	Freight Forwarders	Account User	-

At the bottom of the page, it indicates 'Preferred Time Zone: Eastern'.

Figure 10-7 Business Accounts – Modifying a business account

2. The Modify Business Account page will be displayed.



3. Select **Delete Business Account...**(see *Figure 10-8*)

eManifest Portal

Canada

Business Accounts My Profile

Home > Business Accounts > PORTAL 17 (2471) Modify Business Account

Portal User(URN: PU029479)
eManifest Portal Help and Support | Log out

Modify Business Account

Account Owner Information Business Information

First Name: **Portal**
Family Name: **User**

Account Owner Information

Position Title: **Owner**
E-mail Address: **portal_shared_secret_portail_secret_partage@cbsa-asfc.gc.ca**
Telephone Number: **6135555555**
Telephone Extension:
Fax Number:
Address: **Ottawa, Ontario**
City: **Ottawa**
Country: **Canada**
Province/State: **Ontario**
Postal/Zip Code: **A1A 1A1**

Edit

Delete Business Account < Back

Preferred Time Zone: Eastern

Figure 10-8 Business Accounts – Deleting a business account

4. A Business Account Deletion confirmation message will appear, select **Yes** (see *Figure 10-9*).

Delete Business Account

Are you sure you want to delete business Account PORTAL 17 (2471) from the eManifest Portal?

Note: All users including yourself will no longer have access to this Business Account in the eManifest Portal.

Yes No

Figure 10-9 Business Accounts – Delete Business Account confirmation message

5. A Business Account Deleted page will be displayed confirming that your Business Account has been deleted.
6. Select **OK**.
7. An e-mail will be sent to the Account Owner e-mail address provided to confirm the Business Account deletion.