

Agence des services
frontaliers du Canada



eManifest Portal User Guide

Version 2.0



PROTECTION • SERVICE • INTEGRITY

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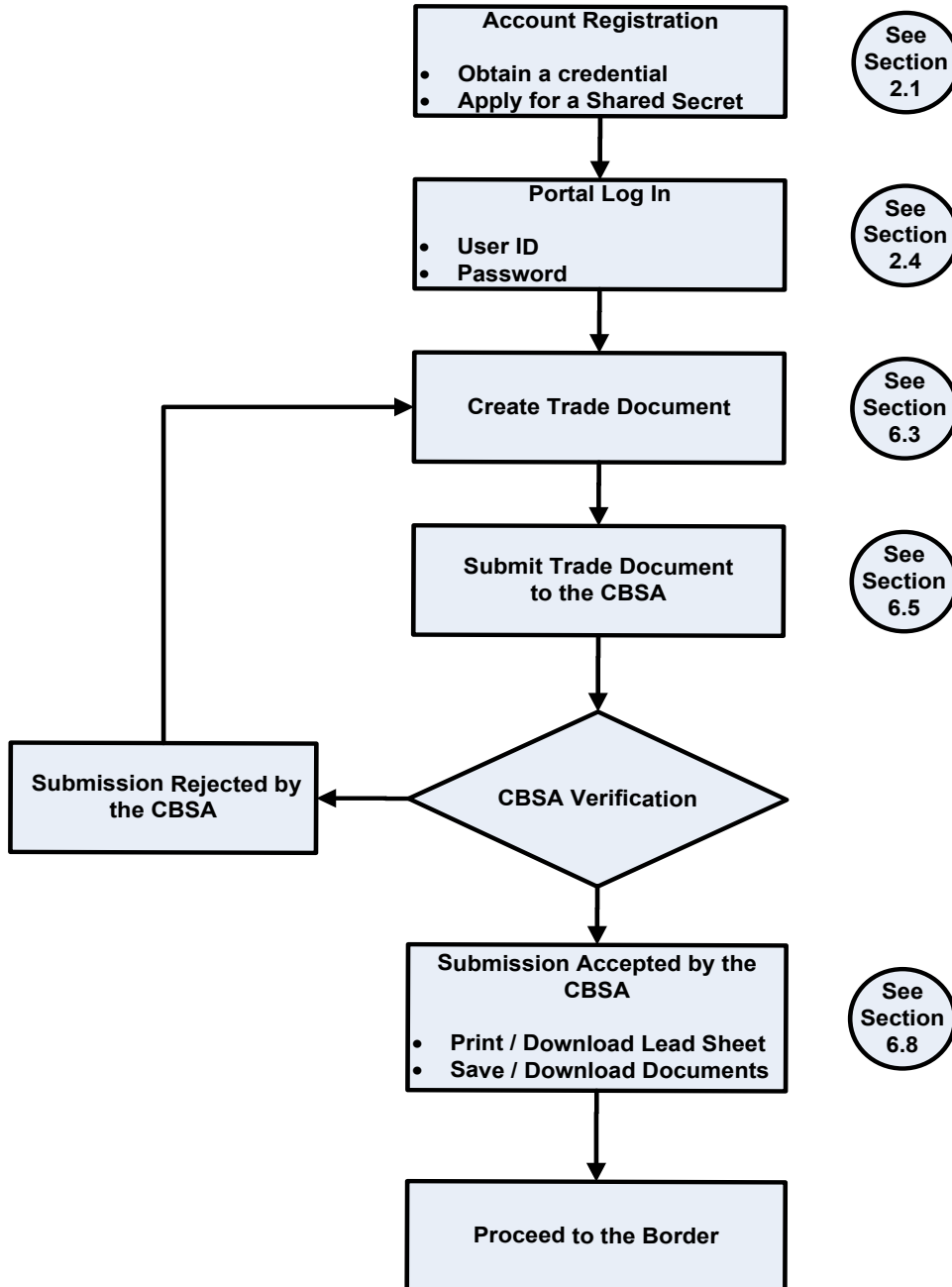


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eManifest Portal Overview





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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 House Bill Portal](#).

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 2.0 and higher.

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 House Bill Portal](#) in the eManifest section of the CBSA Web site.

	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.
	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.
	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 eManifest Technical Support Unit (TSU) provides Electronic Data Interchange (EDI) and Portal technical support by e-mail and telephone for highway carriers.
- The Electronic Commerce Unit (ECU) provides EDI and Portal technical support by telephone for freight forwarders, warehouse operators and brokers.

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
①	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 an Effective Status. The  symbol is displayed if a 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.
	The  symbol is displayed if the Trade Document has been received less than an hour before the estimated time of arrival. If this happens, it is recommended to change the estimated time of arrival on the Trade Document. Otherwise, arriving before or within the one (1) hour window may result in a delay and/or an Administrative Monetary Penalty.



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 House Bill Portal](#)
(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.

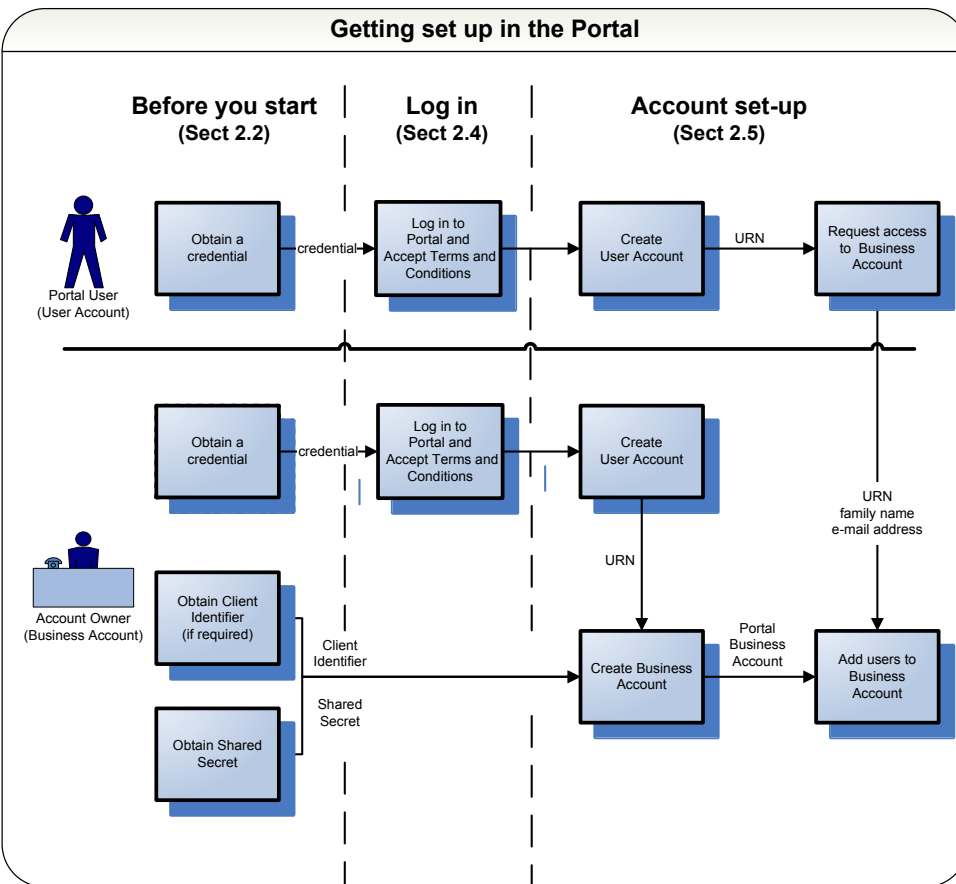


Figure 2-1 Getting set up in the Portal

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.

eManifest Portal

Canada

eManifest Portal Terms and Conditions

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

Terms and Conditions of Use

eMANIFEST PORTAL TERMS AND CONDITIONS

I. GENERAL

These Terms and Conditions outline the obligations and responsibilities that must be followed as a condition for accessing the Canada Border Services Agency (CBSA) eManifest Portal and transmitting prescribed information to the CBSA.

The CBSA reserves the right to make any modifications to the eManifest Portal or to these Terms and Conditions at any time, as required.

II. PRIVACY STATEMENT

The prescribed information collected through the eManifest Portal is done under the authority of section 12.1 of the Customs Act (Canada). The information will be used by the CBSA to determine the admissibility of commercial goods, including conveyances, and persons prior to their arrival in Canada. All prescribed information collected, including personal information, is protected by the CBSA in accordance with the confidentiality provisions of the Customs Act and the Privacy Act (Canada), and may only be used or disclosed in strict accordance with the parameters set out therein.

You have the right to access and/or to correct your personal information under the Privacy Act.

I Accept

DO NOT Accept

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

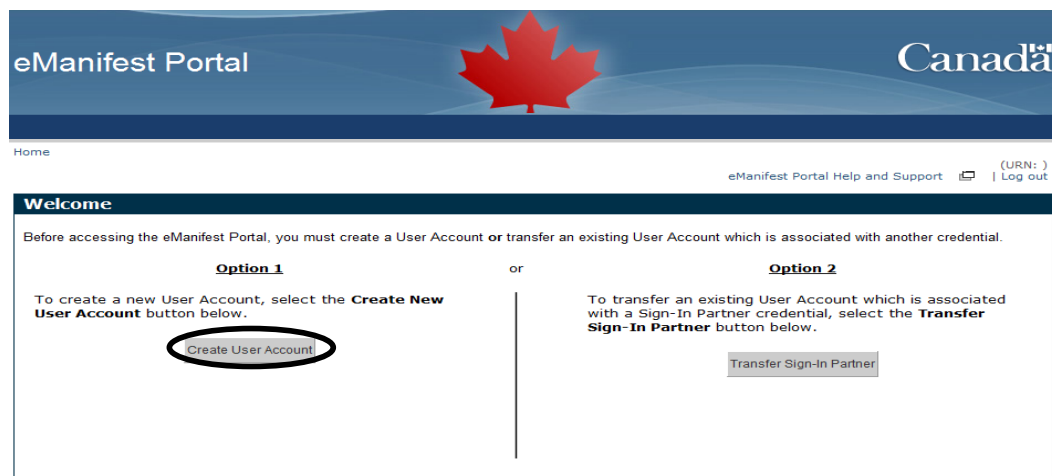
This section outlines the steps for creating a Portal User Account.

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.



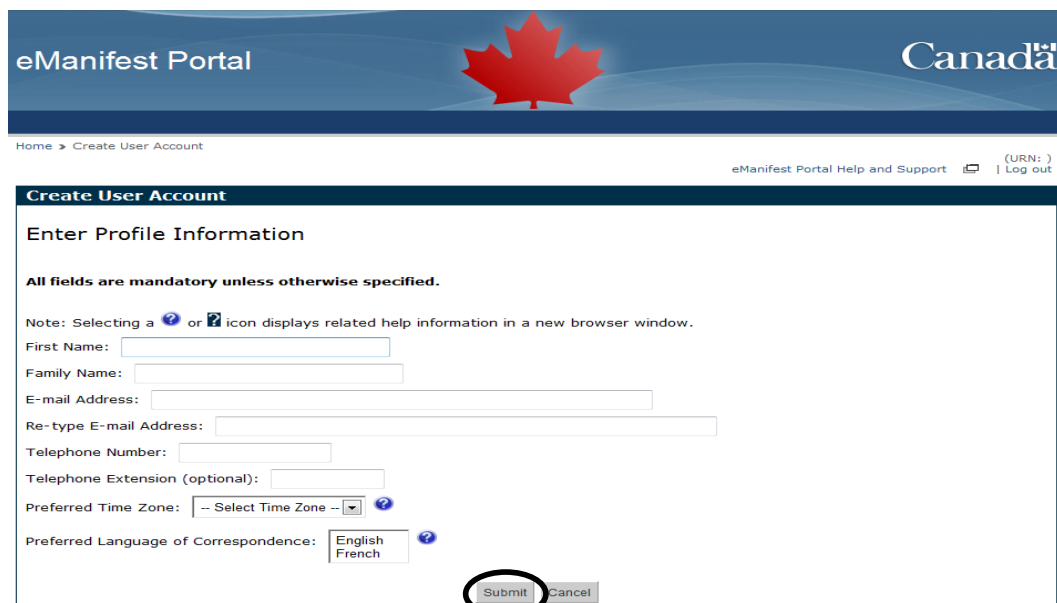
1. Select **Create User Account** (see *Figure 2-3*).



The image shows the eManifest Portal home page. At the top, there is a blue header with the eManifest Portal logo on the left, a red maple leaf in the center, and the Canada wordmark on the right. Below the header, there is a navigation bar with links for Home, eManifest Portal Help and Support, and a user status area showing (URN:) and Log out. The main content area is titled "Welcome" and contains a message: "Before accessing the eManifest Portal, you must create a User Account or transfer an existing User Account which is associated with another credential." Below this message, there are two options separated by a vertical line. Option 1 is titled "Option 1" and says "To create a new User Account, select the **Create New User Account** button below." Below this text is a button labeled "Create User Account" which is circled in black. Option 2 is titled "Option 2" and says "To transfer an existing User Account which is associated with a Sign-In Partner credential, select the **Transfer Sign-In Partner** button below." Below this text is a button labeled "Transfer Sign-In Partner".

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*).



The image shows the eManifest Portal "Create User Account" page. At the top, there is a blue header with the eManifest Portal logo on the left, a red maple leaf in the center, and the Canada wordmark on the right. Below the header, there is a navigation bar with links for Home > Create User Account, eManifest Portal Help and Support, and a user status area showing (URN:) and Log out. The main content area is titled "Create User Account" and contains a section titled "Enter Profile Information". Below this section, there is a message: "All fields are mandatory unless otherwise specified." Below this message, there is a note: "Note: Selecting a ? or ? icon displays related help information in a new browser window." Below the note, there are several input fields: "First Name:", "Family Name:", "E-mail Address:", "Re-type E-mail Address:", "Telephone Number:", "Telephone Extension (optional):", "Preferred Time Zone:" (with a dropdown menu showing "-- Select Time Zone --"), and "Preferred Language of Correspondence:" (with a dropdown menu showing "English" and "French"). Below these fields, there are two buttons: "Submit" and "Cancel". The "Submit" button is circled in black.

Figure 2-4 Create User Account page



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

eManifest Portal  Canada

Business Accounts ▾ My Profile

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

User Account Created

Your eManifest Portal User Account has been created and your profile information has been saved. An email has been sent to the address you provided to confirm your registration.

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

Creation Date/Time: **2013-03-09 13:58:30**

Please note that your URN is a unique number that is associated with your User Account. You should share your URN, family name and email address with other eManifest Portal users so that they may grant you access to their Business Account(s).

Note: An  icon next to a link or button indicates that when that link or button is selected the information will be displayed in a new browser window.

[Print/Download User Account Information](#) ( PDF 33KB)

If you have any questions regarding your User Account or URN please review the [eManifest Portal Help and Support](#)  page.

Continue >

Preferred Time Zone: Eastern

Figure 2-5 User Account Created

	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.
	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>).
	The User Account information in the e-mail should be saved for future reference (see <i>Figure 2-6</i>).
	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.

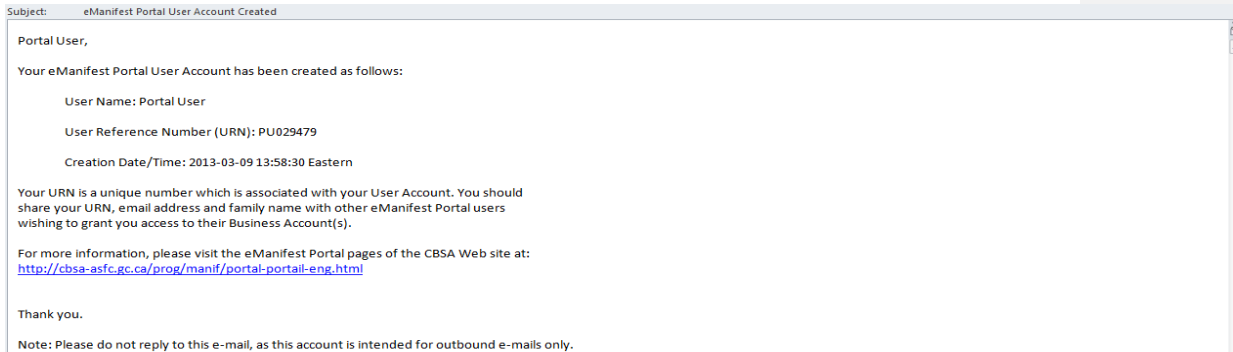


Figure 2-6 User Account creation confirmation e-mail

2.5.2 Creating a Business Account

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

Before you start	You will need: • Client identifier (CBSA-issued); • CBSA-issued Shared Secret; and • Portal User Account.
	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.
Start at:	eManifest Portal – Welcome page (see Figure 2-7).

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



eManifest Portal



Canada

Business Accounts ▾ My Profile

Home > Business Accounts

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

Welcome Portal

The [Business Accounts](#) area allows you to access the Business Account(s) you are permitted to use. If you are the authorized representative of your business this is where you can create a new Business Account(s).

The [View My Profile](#) area displays your User Account information and allows you to edit your profile.

Preferred Time Zone: Eastern

Figure 2-7 eManifest Portal – Welcome page



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

eManifest Portal Canada

Business Accounts My Profile

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

Business Accounts ?

Create Business Account

No Business Accounts

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

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*).

eManifest Portal Canada

Business Accounts My Profile

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

Create Business Account – Step 1 of 3

Enter Business Information

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.

Client Identifier: ?

Business Type: -- Select Business Type --

Shared Secret: ?

Submit Cancel

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:
E-mail Address:
Re-type E-mail Address:
Telephone Number:
Telephone Extension (optional):
Fax Number (optional):
Address:
City:
Country:
Province/State (Canada/USA locations only):
Postal/Zip Code (Canada/USA locations only):

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*).

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: **Bonded Highway 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**

Request Update

Continue

Preferred Time Zone: Eastern

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



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

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

Default log in Business Account: none Save

Business Accounts 1 - 2 of 2

Business Name ▲	Client Identifier	Business Type	Role	Action
PORTAL 17	2471	Bonded Highway Carrier	Account Owner	Modify
PORTAL 18	5472	Bonded Highway 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 *Figure 2-14*).



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: Bonded Highway 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-portail-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	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 his business type. They are defined as follows: 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, Manifest Forwards (Received Documents), prescribed information, Lookups and Useful Links in its associated Business Account Brokers and warehouse operators can view System Messages, Manifest Forwards (Received Documents), prescribed information, Lookups and Useful Links in its associated Business Account.
Proxy Account Owner	The Proxy Account Owner is a user granted privileges by an Account Owner. 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, Manifest Forwards (Received Documents), prescribed information, Lookups and Useful Links in the associated Business Account. Brokers and warehouse operators can view System Messages, Manifest Forwards (Received Documents), prescribed information and Useful Links in its associated Business Account.



Account User

The Account User is a user granted privileges by an Account Owner or a Proxy Account Owner.

Highway carrier and freight forwarder Account Users are granted the ability to view, create and edit Trade Documents, Lookups, Useful Links and view System Messages, Manifest Forwards (Received Documents), prescribed information, Lookups and Useful Links in the associated Business Account.

Brokers and warehouse operators can view System Messages, Manifest Forwards (Received Documents), prescribed information and Useful Links in its associated Business Account.

Account Browser

The Account Browser is a user granted read-only access privilege by an Account Owner or Proxy Account Owner in the associated Business Account.

Highway carrier and freight forwarder Account Browsers are granted the ability to view Trade Documents, Lookups, Useful Links, System Messages, Manifest Forwards (Received Documents) and Useful Links in the associated Business Account.

Brokers and warehouse operators can view System Messages, Manifest Forwards (Received Documents), prescribed information and Useful Links in its associated Business Account.

User statuses in the Portal:

Active

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.

Suspended

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.



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 Received Document	✓	✓	✓	✓
Delete a Received Document	✓	✓	✓	
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	✓	✓	✓	✓

Comment [SK1]: For HTML version, check marks will need "Available" to be coded in the background for accessibility purposes

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

My 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 Accounts 1 - 2 of 2

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

1 2 3 4 5 Next > >>

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

1 2 3 4 5 Next > >>

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's a header with the eManifest Portal logo and the word "Canada". Below this is a navigation bar with "Business Accounts" and "My Profile". The main content area has tabs for "Messages", "Trade Documents", "Lookups", and "User Access". The "User Access" tab is active, and within it, the "Add User" button is circled. Below the button is a list of users with columns for Family Name, First Name, URN, User Role, and User Status. The first user listed is "User" with URN "PU029479" and role "Account Owner".

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

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. It includes fields for "User Reference Number (URN)", "Last Name", and "E-mail Address". The URN field contains "JD411833", the Last Name field contains "Doe", and the E-mail Address field contains "JD@cbsa.gc.ca". The "Submit" button is circled. Below the form, it says "Preferred Time Zone: Eastern".

All fields are mandatory.

User Reference Number (URN): JD411833

Last Name: Doe

E-mail Address: JD@cbsa.gc.ca

Submit Cancel

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, the Government of Canada logo and name are on the left, and 'Canada.gc.ca | Services | Departments' is on the right. Below this is the 'eManifest Portal' header with a large red maple leaf and the 'Canada' wordmark. A navigation bar contains 'Business Accounts' and 'My Profile'. Below the navigation bar, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, it shows 'Portal User (URN: PU029479)' and a 'Log out' link. A secondary navigation bar includes 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Messages' section displays a list of 10 messages with columns for 'Subject' and 'Published'. Below this is the 'Useful Links' section with a 'Create Useful Link' button and a table of links. The footer contains 'Terms and conditions | Transparency', 'About us', 'News', 'Contact us', 'Stay connected', and a row of links for 'HEALTH', 'TRAVEL', 'SERVICE CANADA', 'JOBS', and 'ECONOMY'. A vertical sidebar on the right is labeled 'Show Trade Document Shortcuts'.

1 Government of Canada / Gouvernement du Canada

2 Home > Business Accounts > PORTAL 17 (2471)

3 My Profile

4 Published

5 1 2 3 4 5 Next > >>

6 Messages

7 eManifest Portal Help and Support

8 Log out

9 Portal User (URN: PU029479)

10 Terms and conditions | Transparency

11 About us

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 Data	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

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

Preferred Time Zone: Eastern

Version: 2013-04-25

HEALTH healthycanadians.gc.ca TRAVEL travel.gc.ca SERVICE CANADA servicecanada.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.

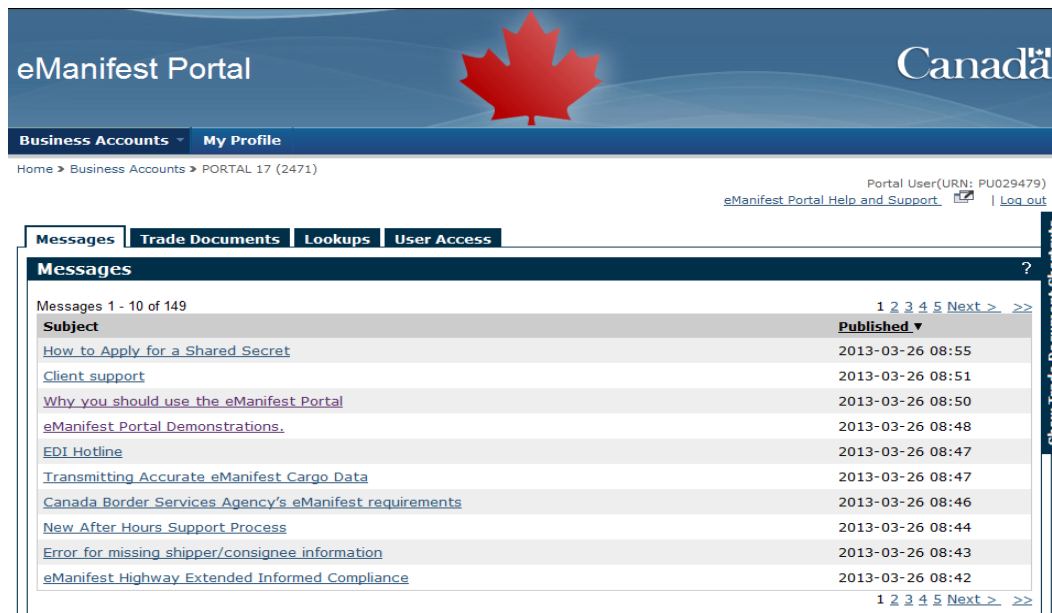
Under the **Messages** tab, you will see System Messages sent by the CBSA to Portal users of a Business Account. These messages include, for example, changes to regulations or policy and systems maintenance messages and are not related to the status of Trade Documents.

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's a header with the eManifest Portal logo, a red maple leaf, and the Canada wordmark. Below the header, there's a navigation bar with 'Business Accounts' and 'My Profile'. The main content area shows the 'Messages' tab selected, displaying a list of 10 messages. The messages are listed in a table with columns for 'Subject' and 'Published'. The subjects are links to various topics like 'How to Apply for a Shared Secret', 'Client support', 'Why you should use the eManifest Portal', etc. The published dates are all from 2013-03-26. On the right side of the messages list, there's a vertical button labeled 'Show Trade Document Shortcuts'.

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

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's a header with the eManifest Portal logo and the Canadian flag. Below the header, a navigation bar shows 'Business Accounts' and 'My Profile'. The main content area is titled 'System Message 1 of 149'. The message subject is 'How to Apply for a Shared Secret', published on 2013-03-26 08:55. The message text explains that a Shared Secret is a temporary access code for businesses to register for the eManifest Portal. It also provides contact information for the eManifest Help Desk. At the bottom of the message content, there are four numbered navigation options: 1. '<< Previous Message' (disabled), 2. 'Print/Download Message (PDF, 862KB)' (with a PDF icon), 3. '< Back to Messages List', and 4. 'Next Message >>' (disabled). A vertical sidebar on the right contains a 'Show Trade Document Shortcuts' button. The footer of the page indicates the preferred time zone is 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*).

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 149

1

2

3

4

5

Next >

>>

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

1

2

3

4

5

Next >

>>

Useful Links

Create Useful Link

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

Links 1 - 4 of 4

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*).

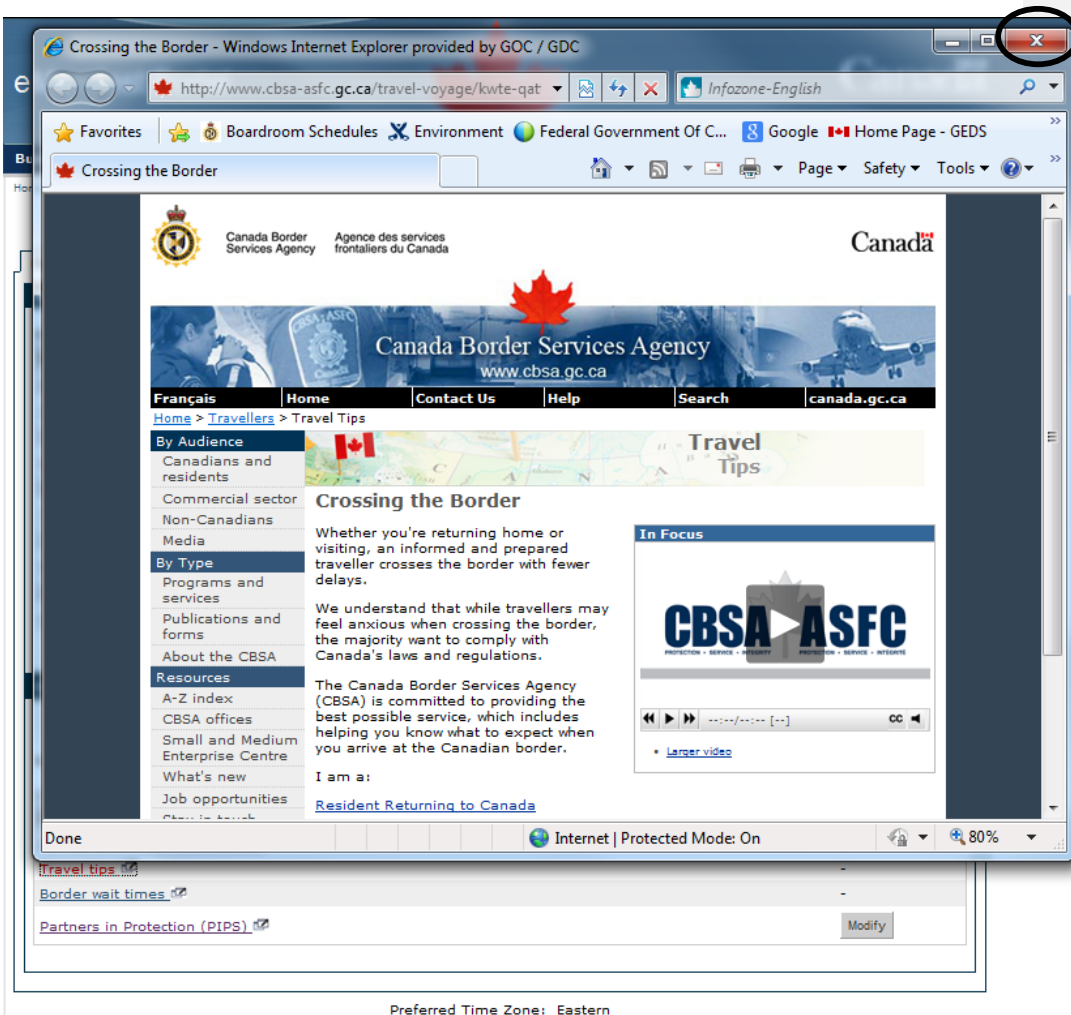


Figure 5-2 Messages tab – Useful Links and new browser window



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 is a header with the eManifest Portal logo, a red maple leaf, and the word "Canada". Below the header, there is a navigation bar with "Business Accounts" and "My Profile". The main content area is divided into two sections: "Messages" and "Useful Links". The "Messages" section displays a list of messages with columns for "Subject" and "Published". The "Useful Links" section displays a list of links with columns for "Link Name" and "Action". A button labeled "Create Useful Link" is circled in the "Useful Links" section.

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 149

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

Useful Links

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

Links 1 - 4 of 4

Link Name	Action
Canada 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:

Create Cancel

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's a header with the eManifest Portal logo and the Government of Canada logo. Below the header, there's a navigation bar with tabs: Business Accounts, My Profile, Messages, Trade Documents, Lookups, and User Access. The Messages tab is selected. Below the navigation bar, there's a sub-header for Messages, showing Messages 1 - 10 of 149. A table lists various messages with columns for Subject and Published date. Below the Messages section, there's a section for Useful Links. It includes a 'Create Useful Link' button and a note: 'Note: [external link icon] = indicates the link will open in a new browser window.' Below this, there's a table of Useful Links with columns for Link Name and Action. The table lists four links: 'Canada Border Services Agency', 'Travel tips', 'Border wait times', and 'Partners in Protection (PIPS)'. The 'Partners in Protection (PIPS)' link has a 'Modify' button in the Action column, which is circled in red. At the bottom of the page, it says 'Preferred Time Zone: Eastern'.

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

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)
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Messages Trade Documents Lookups User Access

Modify Useful Link ?

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

[Edit](#) [Delete...](#) [Back](#)

Preferred Time Zone: Eastern

Version: 2013-04-25

[Terms and conditions](#) | [Transparency](#)

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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 and editing 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 House Bill Portal.



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.

Figure 6-1 Trade Documents tab

Option		Description
1	Create Trade Document	Allows highway carriers to create a Highway Cargo, Highway Conveyance or Combined Highway Document. See section 6.3 of this Guide.
2	Search Submitted Trade Documents	Allows you to search for a previously submitted Trade Document. See section 6.5.3 of this Guide.
3	Submitted Documents	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	Received Documents	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 Received Documents 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 Date/Time of Notice Generation 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 'eManifest Portal' interface for creating a 'Combined Highway Document'. The top navigation bar includes 'Business Accounts' and 'My Profile'. The main content area has tabs for 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Trade Documents' tab is selected, leading to the 'Create Combined Highway Document' form. The form is divided into several sections: 'Carrier Information' (Carrier Name: PORTAL 17, Carrier Code: 2471), 'Mandatory Fields' (Conveyance Reference Number (CRN): 2471, Cargo Control Number (CCN): 2471), and 'Complete all mandatory fields within the tabs below.' The 'General' tab is active, showing fields for 'Shipper' (Name, Address, City, Country, Province/State, Postal/Zip Code, Contact Information) and 'Notify Party' (Name, Address, City, Country, Province/State, Postal/Zip Code, Contact Information). The 'Delivery Address' tab is also visible. At the bottom, there are buttons for 'Check for Errors', 'Save and Continue', 'Save and Finish Later', 'Submit to the CBSA', 'Print/Download Document (PDF, 2000KB)', and 'Cancel'. Numbered callouts 1 through 12 highlight specific fields and buttons.

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.

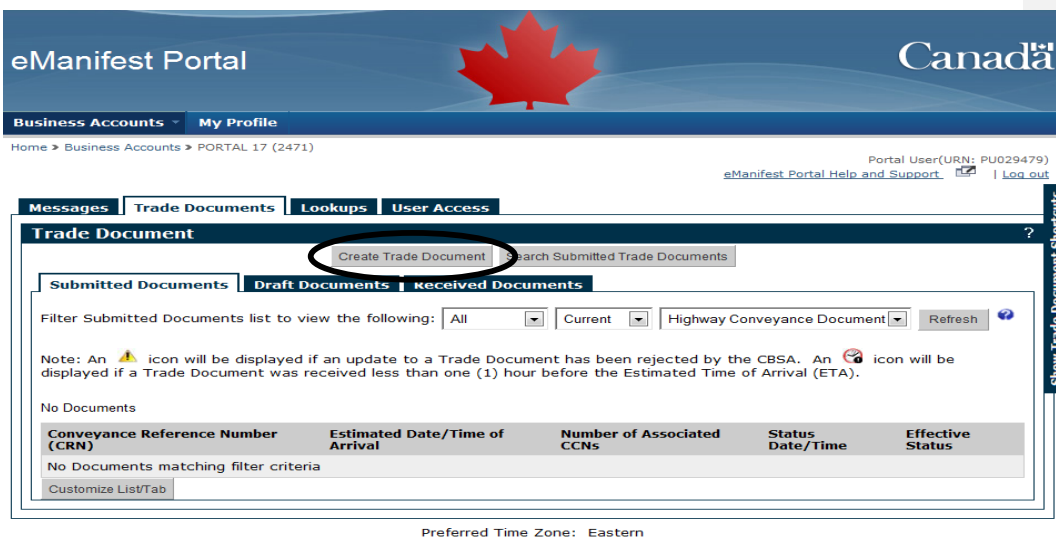


6.3.2 Creating a Combined Highway Document

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 eManifest Portal interface. At the top, there's a header with the eManifest Portal logo and a red maple leaf. Below the header, there's a navigation bar with tabs: Messages, Trade Documents (selected), Lookups, and User Access. The main content area is titled 'Trade Document' and contains a sub-header with 'Submitted Documents', 'Draft Documents', and 'Received Documents'. Below this, there's a filter section for Submitted Documents with dropdown menus for 'All', 'Current', and 'Highway Conveyance Document', and a 'Refresh' button. A note below the filters states: 'Note: An  icon will be displayed if an update to a Trade Document has been rejected by the CBSA. An  icon will be displayed if a Trade Document was received less than one (1) hour before the Estimated Time of Arrival (ETA)'. Below the note, it says 'No Documents' and shows a table with columns: 'Conveyance Reference Number (CRN)', 'Estimated Date/Time of Arrival', 'Number of Associated CCNs', 'Status Date/Time', and 'Effective Status'. The table content shows 'No Documents matching filter criteria'. At the bottom, there's a 'Customize List/Tab' button and a 'Preferred Time Zone: Eastern' label.

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*).

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 

Business Accounts ▾ My Profile

Home ▸ Business Accounts ▸ PORTAL 17 (2471)

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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).

eManifest Portal

Canada

Business Accounts

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Home > Business Accounts > PORTAL 17 (2471)

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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](#)

OK

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 6.8.2 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 7.3.3 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.

	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.
	The cargo will not link if your Highway Conveyance Document is an empty conveyance or only carrying goods qualifying as an exception.
	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)



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.

Enter Cargo Information

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.

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

[Print/Download Document \(PDF, 956KB\)](#) Cancel

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)

	You can print or download the Highway Cargo Document by selecting the associated link (see section 6.8.2 of this Guide). 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 7.3.3 of this Guide).
---	--

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.

	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 CCN can they resubmit the document to the CBSA.
---	--

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).

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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 Single Document
- Combined Highway Document
- Use Trade Document Lookup

Submit Cancel

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 Figure 6-1, item 6).



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

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Portal User(URN: PU029479)
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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*).

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Messages

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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.

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 6-12 Trade Documents tab – Enter Trailer Information



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

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My Profile

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Portal User(URN: PU029479)
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Messages

Trade Documents

Lookups

User Access

Create Highway Conveyance Document

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: -- Select Country --

Trailer Plate Province/State: -- Select 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.)

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

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](#)

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*).

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Messages Trade Documents Lookups User Access

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 - 1 of 1

Select	Cargo Control Number (CCN) ▲	Consolidated Freight	Matched
☐	24711122334455	No	No

Select Cancel

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.

eManifest Portal Canada

Business Accounts | My Profile

Home » Business Accounts » PORTAL 17 (2475)

Portal User (URL: PU019479) 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 [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](#)

Preferred Time Zone: Eastern

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)
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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)

	You can print or download the Lead Sheet and/or the Highway Conveyance Document by selecting the associated link (see section 6.8.2 of this Guide). 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 7.3.3 of this Guide).
---	--



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*).

Home > Business Accounts > PORTAL 17 (2471)

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

Messages Trade Documents Lookups User Access

Trade Document

Create Trade Document Search Submitted Trade Documents

Submitted Documents **Draft Documents** Received Documents

Note: You may save an additional 97 Draft Trade Documents for this Business Account.

Documents 1 - 3 of 3

Document Number ①	Document Type ②	Saved Date/Time ③	Action ④
2471DRAFTCOMBINEDCCN	Combined Highway Document	2013-03-28 08:47	Delete
2471DRAFTCCN	Highway Cargo Document	2013-03-28 08:46	Delete
2471DRAFTCRN	Highway Conveyance Document	2013-03-28 08:46	Delete

Customize List/Tab

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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



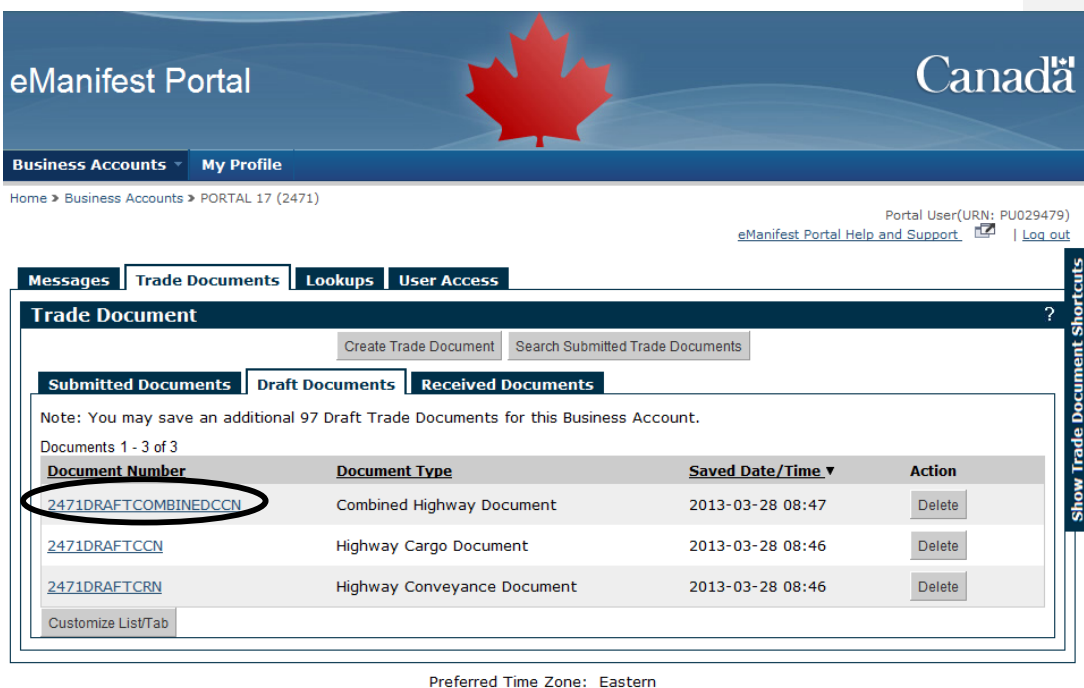
Column Heading		Description
1	Document Number	The CCN or CRN of the associated document. For a Combined Highway Document, this column will display the CRN, if available. If this data has not been provided in the document, the carrier code will be displayed.
2	Document Type	Indicates the type of Draft Trade Document: • 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

	You can complete any of the available Draft Trade Documents from the list within the Business Account.
	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.
	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's a header with the eManifest Portal logo, a red maple leaf, and the Canada wordmark. Below the header, there's a navigation bar with 'Business Accounts' and 'My Profile'. The main content area has tabs for 'Messages', 'Trade Documents', 'Lookups', and 'User Access'. The 'Trade Documents' tab is active, showing sub-tabs for 'Submitted Documents', 'Draft Documents', and 'Received Documents'. The 'Draft Documents' sub-tab is selected, displaying a table of draft trade documents. The first document, with the number '2471DRAFTCOMBINEDCCN' circled, is a 'Combined Highway Document' created on 2013-03-28 at 08:47. Other documents in the list include 'Highway Cargo Document' and 'Highway Conveyance Document'. A note at the top of the table states: 'Note: You may save an additional 97 Draft Trade Documents for this Business Account.' The bottom of the page shows the 'Preferred Time Zone: Eastern'.

Document Number	Document Type	Saved Date/Time	Action
2471DRAFTCOMBINEDCCN	Combined Highway Document	2013-03-28 08:47	Delete
2471DRAFTCCN	Highway Cargo Document	2013-03-28 08:46	Delete
2471DRAFTCRN	Highway Conveyance Document	2013-03-28 08:46	Delete

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** DRAFTCOMBINEDCRN ?

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

Complete all mandatory fields within the tabs below.

General Ports Tractor Trailer Addresses Cargo

Estimated Date of Arrival: (YYYYMMDD) 20130425 ?

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

▼ 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.

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 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's a header with the eManifest Portal logo and the Canadian flag. Below the header, there's a navigation bar with tabs: Business Accounts, My Profile, Messages, Trade Documents, Lookups, and User Access. The Trade Documents tab is selected. Under the Trade Documents tab, there are sub-tabs: Submitted Documents, Draft Documents, and Received Documents. The Draft Documents sub-tab is selected. Below the sub-tabs, there's a note: "Note: You may save an additional 97 Draft Trade Documents for this Business Account." Below the note, there's a table with 4 columns: Document Number, Document Type, Saved Date/Time, and Action. The table contains 3 rows of draft documents. At the bottom of the table, there's a button labeled "Customize List/Tab" which is circled in red. To the right of the table, there's a vertical button labeled "Show Trade Document Shortcuts".

Document Number	Document Type	Saved Date/Time	Action
2471DRAFTCOMBINEDCCN	Combined Highway Document	2013-04-11 07:42	Delete
2471DRAFTCCN	Highway Cargo Document	2013-03-28 08:46	Delete
2471DRAFTCRN	Highway Conveyance Document	2013-03-28 08:46	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*).

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 <i>Figure 6-20</i>). 2. Under Customize Trade Document Tab, select your default Submitted Documents List filtering preferences by selecting the: - Effective status (All, Rejected, Accepted, Reported, Updating..., Acquitted and Cancelled); - Status (Current or Historical); and, - Trade Document type (Highway Conveyance Document and Highway Cargo Document) (see <i>Figure 6-21</i>). 3. Select Save (see <i>Figure 6-21</i>). 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 500 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	✓	✓	✓	✓
Effective Status	✓	✓	✓	✓
Consignee Name			✓	✓
Matched			✓	✓
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*).

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

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 Figure 6-22)		
Filter Options		Description
2	Effective Status	The Effective Status represents the latest status of the Trade Document.
	All	All submitted Trade Documents Effective Statuses will be displayed.
	Rejected	Indicates a Trade Document has been Rejected by the CBSA and the rejection reason(s) is provided.
	Accepted	Indicates a Trade Document has passed validation checks and has been Accepted by the CBSA.
	Reported (Conveyance Document only)	Indicates a Highway Conveyance Document and associated Highway Cargo Document(s) have been Reported at First Canadian Port of Arrival as per the requirements of Section 12(1) of the <i>Customs Act</i> .
	Updating...	Indicates the processing of a Trade Document submitted to the CBSA using the Portal.
	Cancelled	Indicates a Trade Document submission has been Cancelled by the client or by the CBSA.
	Acquitted (Cargo Document only)	Indicates goods are no longer controlled by a Highway Cargo Document.
3	Current	Submitted Trade Documents remain on the Current list for 24 hours after reaching an Effective 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 90 days and are then removed. Once removed from the Historical list, Trade Documents are no longer accessible through your Portal Business Account.
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 Figure 6-22)

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	Effective 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 500 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 Figure 6-23)

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	Matched	In the event that the cargo is non-consolidated, " Matched " means that your Highway Cargo Document is linked to a pre-arrival release submitted by a broker/importer. If the cargo is consolidated, " Matched " means that your Highway Cargo Document is linked to a Close Message submitted by a freight forwarder.
16	Status Date/Time	The date and time the Trade Document was submitted.
17	Effective 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 500 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.

Effective 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](#).

	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.
	The  symbol is only displayed in special circumstances in relation to submitted Changes, Amendments or Cancels to Highway Cargo or Highway Conveyance Documents. It means a Change, Amendment or Cancel the carrier has submitted has not passed business validation checks performed by the CBSA system and the Trade Document Change, Amendment or Cancel has been rejected. When this situation arises, the previous version of the carrier's submitted Trade Document remains in the CBSA system until such time as the carrier re-submits the Trade Document Change, Amendment or Cancel again and passes the CBSA system's business validation rules. 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 Change, Amendment or Cancel 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. Once the submitted information is accepted by the CBSA, any previous version will be cleared and any previous information will be lost.

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 Effective 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 17 (2471)

Portal User(URN: PU029479)
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Messages

Trade Documents

Lookups

User Access

Status History

?

Cargo Control Number (CCN): [247102-04-2013-002](#)
Document Type: **Highway Cargo Document**
Carrier Name: **PORTAL 17**
Carrier Code: **2471**

Matched:
Effective Status: **Accepted (2013-04-02 08:47)**

Status History 1 - 2

Date/Time ▼	Status	Message
2013-04-02 08:47	Accepted	This Cargo Document has been accepted by the CBSA.
2013-04-02 08:47	Submitted	This Cargo Document has been submitted to the CBSA.

Status History Details

Date/Time: 2013-04-02 08:47
Status: Accepted
Message: This Cargo Document has been accepted by the CBSA.

[Print/Download Status History \(PDF, 1271KB\)](#) < Back

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

1

2

3

4

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



Section		Description
1	Trade Document Information	For all Trade Documents, provide the following information: • Trade Document Number (CRN or CCN); • Type of document (Cargo or Conveyance); • Client Identifier; • Carrier Code; and • Effective Status. For Cargo Trade Documents only, the following additional information is provided: • Matched - Yes or No If your Highway Cargo Document is Matched (Yes), it means the CBSA has received a declaration from the importer for the goods you have Reported and the CBSA is awaiting arrival of the shipment at the First Canadian Port of Arrival.
2	Status History	Provides a list of all statuses that the Trade Document has undergone since being submitted to the CBSA. Notes: • 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

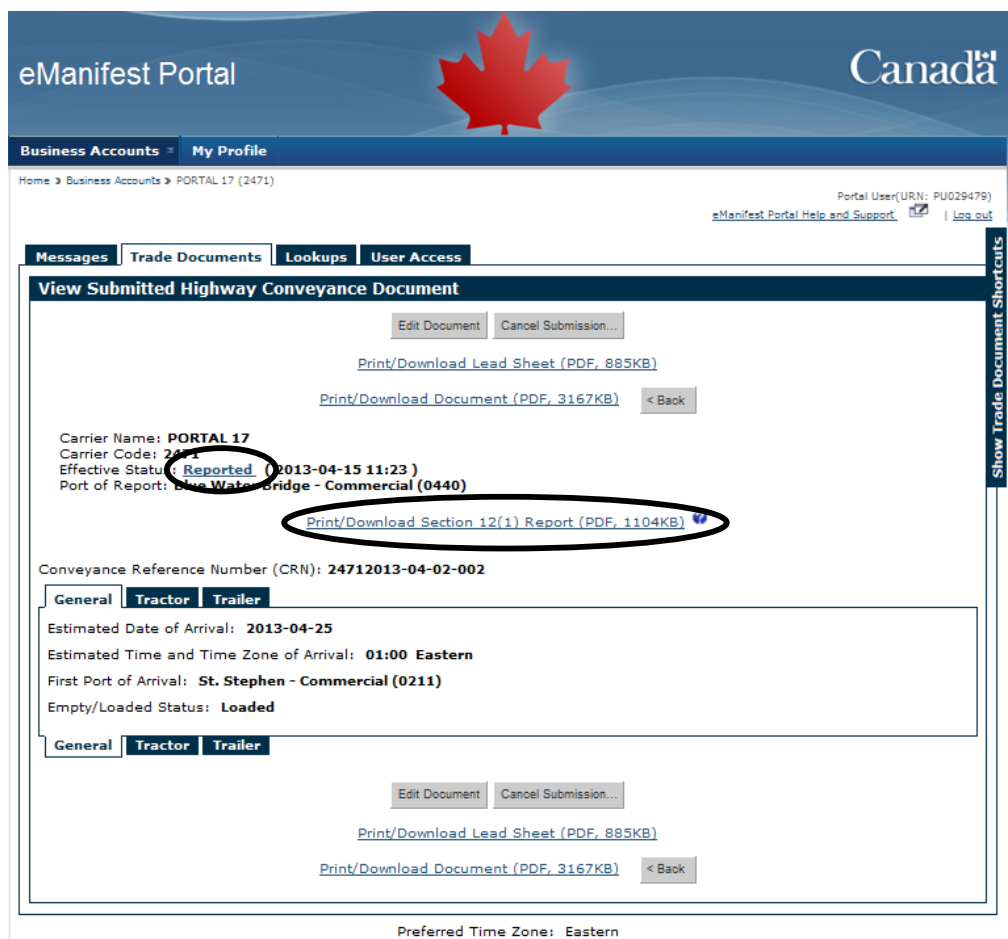
Section 12(1) is part of the Customs Act. A Section 12(1) Report is available for print and/or download once your goods have arrived on the conveyance at the First Canadian Port of Arrival. This report is used for auditing and record-keeping purposes and is proof the imported goods have been reported 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. This report will remain in the Portal for 90 days only. 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 Trade Document **Status History** after the cargo has arrived (see *Figure 6-25*).



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

View Submitted Highway Conveyance Document

Edit Document Cancel Submission...

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

Carrier Name: **PORTAL 17**
Carrier Code: 2471
Effective Status: **Reported** (2013-04-15 11:23)
Port of Report: Blue Water Bridge - Commercial (0440)

[Print/Download Section 12\(1\) Report \(PDF, 1104KB\)](#)

Conveyance Reference Number (CRN): 24712013-04-02-002

General | **Tractor** | Trailer

Estimated Date of Arrival: 2013-04-25
Estimated Time and Time Zone of Arrival: 01:00 Eastern
First Port of Arrival: St. Stephen - Commercial (0211)
Empty/Loaded Status: Loaded

General | **Tractor** | Trailer

Edit Document Cancel Submission...

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

Preferred Time Zone: Eastern

Show 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 :
24712013-04-02-002

Carrier Name - Nom du transporteur : PORTAL 17	First Port of Arrival - Premier port d'arrivée : Blue Water Bridge - Commercial (B440)	Date/Time of Report - Date et heure de la déclaration : 2013-04-15 11:22 EDT
Cargo Control Number(s) (CCN) - Numéro(s) de contrôle du fret (NCF) : 247102-04-2013-002		

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*).

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

View Submitted Highway Conveyance Document

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

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

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

Carrier Name: **PORTAL 17**
Carrier Code: **2471**
Effective Status: **Accepted** (2013-03-28 09:40)

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

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

Estimated Date of Arrival: **2013-04-25**
Estimated Time and Time Zone of Arrival: **01:00 Eastern**
First Port of Arrival: **St. Stephen - Commercial (0211)**
Empty/Loaded Status: **Loaded**

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

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

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

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

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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 Support Unit (TSU) .



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*).

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.

	By default, the following columns are displayed: <u>Submitted Conveyance Documents</u>: Conveyance Reference Number, Estimated Date/Time of Arrival, Number of Associated CCNs, Status Date/Time and Effective Status. <u>Submitted Cargo Documents</u>: Cargo Control Number, Consignee Name, Matched, Status Date/Time and Effective Status.
---	---

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, Effective Status, Tractor Plate, Source of Transmission and Submitted Date/Time (see *Figure 6-29*).
 - Submitted Cargo Documents: Cargo Control Number, Consignee Name, Matched, Status Date/Time, Effective 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 Received Documents (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:
 - Effective status (All, Rejected, Accepted, Reported, Updating..., Acquitted and Cancelled);
 - Status (Current or Historical); and,
 - Trade Document type (Highway Conveyance Document and 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).

eManifest Portal

Canada

Business Accounts ▾ My Profile

Home ▸ Business Accounts ▸ PORTAL 17 (2471)

Portal User(URN: PU029479)
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Messages Trade Documents Lookups User Access

View Submitted Highway Conveyance Document

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

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

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

Carrier Name: **PORTAL 17**
Carrier Code: **2471**
Effective Status: **Reported** (2013-04-15 11:23)
Port of Report: **Blue Water Bridge - Commercial (0440)**

[Print/Download Section 12\(1\) Report \(PDF, 1104KB\)](#)

Conveyance Reference Number (CRN): **24712013-04-02-002**

General **Tractor** **Trailer**

Estimated Date of Arrival: **2013-04-25**
Estimated Time and Time Zone of Arrival: **01:00 Eastern**
First Port of Arrival: **St. Stephen - Commercial (0211)**
Empty/Loaded Status: **Loaded**

General **Tractor** **Trailer**

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

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

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

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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*).

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Portal User(URN: PU029479)
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Edit Submitted Highway Conveyance Document

Carrier Name: **PORTAL 17**
Carrier Code: **2471**
Effective Status: **Reported** (2013-04-15 11:23)

All fields are mandatory unless otherwise specified.

Document Change/Amendment Indicator:

Conveyance Reference Number (CRN): **24712013-04-02-002**
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 \(PDF, 3167KB\)](#)

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.

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Portal User(URN: PU029479)
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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
☒	Clerical error when keying conveyance data. (Code: 40)
☐	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)
☐	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)
☐	Amendment not elsewhere specified. (Code: 60)
☐	Change request delayed by client systems outage. (Code: 80)
☐	Change request delayed by CBSA systems outage. (Code: 85)

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).

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Portal User(URN: PU029479)
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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 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 \(PDF, 3167KB\)](#)

OK

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 (or delete) 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*).

The screenshot shows the eManifest Portal interface. At the top, there's a header with the eManifest Portal logo, a red maple leaf, and the Canada wordmark. Below the header, there's a navigation bar with 'Business Accounts' and 'My Profile'. The main content area is titled 'View Submitted Highway Conveyance Document'. It includes a filter list with 'All', 'Current', and 'Highway Conveyance Document' selected. The 'Cancel Submission...' button is circled in red. Below the button, there are links for 'Print/Download Lead Sheet (PDF, 885KB)' and 'Print/Download Document (PDF, 3167KB)'. The document details section shows: Carrier Name: PORTAL 17, Carrier Code: 2471, Effective Status: Rejected (2013-03-28 08:54). The Conveyance Reference Number (CRN) is 2471DRAFTCOMBINEDCRN. The document type is General, Tractor, Trailer. The estimated date of arrival is 2013-04-25, and the estimated time and time zone of arrival is 01:00 Eastern. The first port of arrival is St. Stephen - Commercial (0211), and the empty/loading status is Loaded. At the bottom, there's a 'Preferred Time Zone: Eastern' label.

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



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

Submitted Highway Conveyance Document

Edit Document Cancel Submission...

Cancel Submission [X]

Are you sure you want to cancel this Highway Conveyance Document submission?

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

Yes No

ier Name: P
ier Code: 24
ctive Status:
ance Refere
eral | **Tractor** | Trailer
ated Date of Arrival: **2013-04-25**

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*).

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

Trade Document

Create Trade Document Search Submitted Trade Documents

Submitted Documents Draft Documents Received Documents

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

Note: An icon will be displayed if an update to a Trade Document has been rejected by the CBSA. An icon will be displayed if a Trade Document was received less than one (1) hour before the Estimated Time of Arrival (ETA).

Documents 1 - 3 of 3

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Effective Status
2471DRAFTCOMBINEDCRN	2013-04-25 01:00 Eastern	1	2013-04-02 07:17	Cancelled
2471123456789	2013-04-25 01:00 Eastern	1	2013-03-28 09:40	Accepted
2471123456	2013-04-25 01:00 Eastern	1	2013-03-28 08:40	Rejected

Customize List/Tab

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 6-36 Trade Documents tab – Submitted Documents tab

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



eManifest Portal 

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

View Submitted Highway Conveyance Document

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

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

Carrier Name: **PORTAL 17**
Carrier Code: **2471**
Effective Status: **Accepted** (2013-03-28 09:40)

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

General **Tractor** **Trailer**

Estimated Date of Arrival: **2013-04-25**
Estimated Time and Time Zone of Arrival: **01:00 Eastern**
First Port of Arrival: **St. Stephen - Commercial (0211)**
Empty/Loaded Status: **Loaded**

General **Tractor** **Trailer**

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

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

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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.

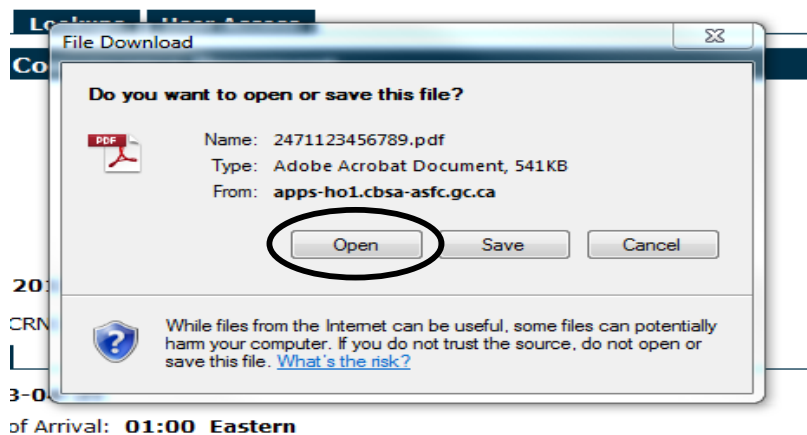


Figure 6-38 File Download

File Download (see Figure 6-38)



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 : ☐ Empty/Vide ☒ Loaded/Chargé		
Tractor Information - Information sur le tracteur :				
Tractor Plate - Plaque d'immatriculation du tracteur : tra1plate1 Nova Scotia Canada		Tractor Identifier - Identificateur du tracteur :		
Tractor Seal Number(s) - Numéro(s) du (des) sceau(x) du tracteur :				
Cargo Exceptions - Courier Low Value Shipment - Expédition de faible valeur Exceptions du fret : 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 : tra1plate1 Nova Scotia Canada		Trailer Identifier - Identificateur de la remorque :		
Trailer Seal Number(s) - Numéro(s) du (des) sceau(x) de la remorque :				
Cargo Exceptions - Courier Low Value Shipment - Expédition de faible valeur Exceptions du fret : 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 - Courier Low Value Shipment - Expédition de faible valeur Exceptions du fret : Instrument of International Trade - Instrument pour le commerce international				Flying Trucks - Expéditions aériennes transportées par camion Postal - Postales Emergency Repairs - Réparations d'urgence



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Highway Conveyance Document
Document de moyen de transport routier

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 : traiplate1 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
Container Identifier – Identificateur du conteneur :		
Container Seal Number(s) – Numéros du (des) sceau(x) du conteneur :		

Canada

Figure 6-40 Highway Conveyance Document – Page 2



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Highway Conveyance Document
Document de moyen de transport routier

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

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

Canada

3

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*).

	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. 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.
	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: • 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>).



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**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



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

Canada

1

Figure 6-42 eManifest Portal Lead Sheet



6.9 Received Documents

This section outlines the information in regards to Received Documents (Manifest Forwards) sent on behalf of Trade Chain Partners.

- It is the user's responsibility to manage the Received Documents in his Business Account.

6.9.1 What is a Received Document?

A Received Document is an electronic copy of a Trade Document submitted to the CBSA, by a Trade Chain Partner, which has been sent to your client identifier. These Received Documents are referred to as Manifest Forwards and are defined as electronic notices that contain the data of a House bill submitted to the CBSA by a freight forwarder.

6.9.2 Customizing the Received Documents List/Tab

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



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

Start at: Trade Documents tab.

1. Select the **Received Documents** sub-tab and then **Customize List/Tab** (see *Figure 6-43*).

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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

Received Documents

Create Trade Document Search Submitted Trade Documents

Submitted Documents Draft Documents Received Documents

Search Received Documents

No Documents

Cargo Control Number (CCN)	Notice Type	Date/Time of Notice Generation	Action
Received Documents list is empty			

Customize List/Tab

Preferred Time Zone: Eastern

Figure 6-43 Received Documents Tab



2. Under **Customize Received Documents List**, select the number (10, 25 or 50) of documents you want to be displayed (see *Figure 6-44*).

Figure 6-44 Trade Document tab – Customized Received Documents

3. Select **Save** (see *Figure 6-44*).
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 **Received Documents** sub-tab, select **Customize List/Tab** (see *Figure 6-43*).
2. Under **Customize Trade Document Tab**, select the default sub-tab between: Submitted Documents, Draft Documents and Received Documents (see *Figure 6-44*).
3. Select **Save** (see *Figure 6-44*).
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 **Received Documents** sub-tab, select **Customize List/Tab** (see *Figure 6-43*).



2. Under **Customize Trade Document** tab, select your default Submitted Documents List filtering preferences by selecting the:
 - Effective status (All, Rejected, Accepted, Reported, Updating..., Acquitted and Cancelled);
 - Status (Current or Historical); and,
 - Trade Document type (Highway Conveyance Document and Highway Cargo Document (see *Figure 6-44*).
3. Select **Save** (see *Figure 6-44*).
4. Select **OK** to save your customized settings.

6.10 Deleting a Received Document

This section outlines how to delete a Received Document.

The following example provides instructions for deleting a House bill Manifest Forward (Received Document).

Start at: Trade Documents tab.

1. Select the **Received Documents** sub-tab (see *Figure 6-45*).

The screenshot shows the eManifest Portal interface. The 'Trade Documents' tab is selected, and the 'Received Documents' sub-tab is active. A table lists documents with the following columns: Cargo Control Number (CCN), Notice Type, Date/Time of Notice Generation, and Action. The 'Delete' button in the Action column for the document with CCN B002REPORTING-2 is highlighted with a red circle.

Cargo Control Number (CCN)	Notice Type	Date/Time of Notice Generation	Action
B002REPORTING-MARCH-26	MANIFEST FORWARD	2013-03-26 11:19	Delete
B002REPORTING-2	MANIFEST FORWARD	2013-03-25 15:25	Delete
B002HB-MARCH23-10H31	MANIFEST FORWARD	2013-03-23 10:32	Delete
B002TEST-LOGPASS	MANIFEST FORWARD	2013-03-19 17:08	Delete
B002HB-MARCH19-8H16	MANIFEST FORWARD	2013-03-19 08:27	Delete
B656HBCMIDCHANGE	MANIFEST FORWARD	2013-03-16 15:27	Delete
B656MANIFESTFORWARD10	MANIFEST FORWARD	2013-03-16 12:55	Delete

Figure 6-45 Trade Document tab – Received Documents

2. Under the Action column, select **Delete** aligned to the **CCN** of the House bill Manifest Forward you want to delete (see *Figure 6-45*).
3. Select **Yes** to confirm your action (see *Figure 6-46*).

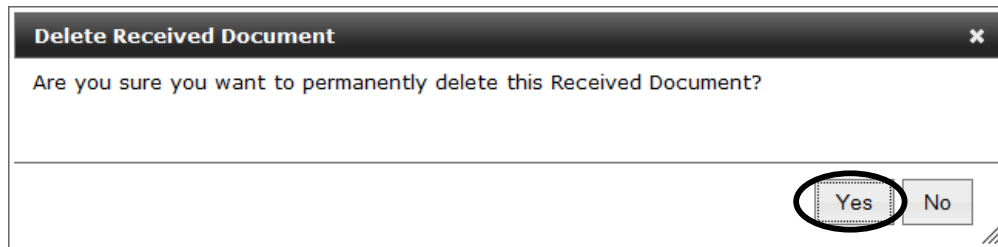


Figure 6-46 Trade Document tab – Delete Received Document

4. Select **OK** to delete your Received Document.



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

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*).

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Messages Trade Documents **Lookups** User Access

Lookups

Tractor **Trailer** Addresses Trade Document

Create Trailer Lookup Search Trailer 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

Trailer Lookups 1 - 2 of 2

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

Show Trade Document Shortcuts

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:

Create Cancel

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**.

	If the Lookup name that you entered already exists, a Lookup Name Already Exists message will be displayed. 1. Select Yes to confirm that you want to use the same name. 2. Trailer Lookup Created message will be displayed. 3. Select OK.
	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. 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**.

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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):

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 [Create a Shipper Lookup](#)

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 \(PDF, 856KB\)](#) [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.



	If the Lookup name that you entered already exists, a Lookup Name Already Exists message will be displayed. 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.
	Once 1,000 Lookups have been created for the Lookup type, a Maximum Lookup Limit Reached message will be displayed. 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*).

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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

Show Trade Document Shortcuts

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*).

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Messages Trade Documents Lookups User Access

Search Consignee Lookups

Search in: Name (Company/Person)
City
Province/State

Search for: d

Search Cancel

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

Figure 7-6 Lookups tab – Search Consignee Lookups

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



6. 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.

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Search Consignee Lookups

Search Criteria:
Name (Company/Person): c

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

Consignee Lookups 1 - 2 of 2

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

New Search

Modify Search

Cancel

Preferred Time Zone: Eastern

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*).



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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: [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 Province/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](#)

Consignee

[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.

[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*).

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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

☒

[Shippers International](#)

100 International Dr

Montreal

Quebec

☐

[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



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

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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 [Select a Shipper Lookup](#)

Name (Company/Person): **Shippers International**

Address Line 1: **100 International Dr**

Address Line 2 (optional):

Address Line 3 (optional):

City: **Montreal**

Country: **Canada**

Province/State (Canada/USA locations only): **Quebec**

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 Tractor Trailer 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 \(PDF, 200KB\)](#) [Cancel](#)

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*).

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Messages Trade Documents Lookups User Access

Create Trade Document

Note: You have space to save 98 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 7-11 Use Trade Documents Lookup



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

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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
☒	Combined example	Combined Highway Document
☐	Conveyance look up 1	Highway Conveyance Document
☐	TD look up	Highway Conveyance Document

Select Cancel

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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).



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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) : 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

General

Ports

Tractor

Trailer

Addresses

Cargo

Check for Errors

Save and Continue

Save and Finish Later

Submit to the CBSA

Print/Download Document (PDF, OKB)

Cancel

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*).

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Messages Trade Documents **Lookups** User Access

Lookups

Tractor Trailer Addresses Trade Document

Create Tractor Lookup Search Tractor 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

Tractor Lookups 1 - 2 of 2

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

Preferred Time Zone: Eastern

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).

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Messages Trade Documents Lookups User Access

Tractor Lookup Details

Tractor Lookup Name: **Look up 2**

Tractor Identifier:

Tractor Plate: **Newplate**

Tractor Plate Province/State: **Nova Scotia**

Tractor Plate Country: **Canada**

Edit Delete < < Back

Preferred Time Zone: Eastern

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.

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Messages Trade Documents Lookups User Access

Edit Tractor Lookup

All fields are mandatory unless otherwise specified.

Tractor Lookup Name: Look up 2

Tractor Identifier (mandatory if available):

Tractor Plate: Newplate 2

Tractor Plate Country: Canada

Tractor Plate Province/State: Nova Scotia

Submit Cancel

Preferred Time Zone: Eastern

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.

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Messages Trade Documents **Lookups** User Access

Tractor Lookup Details

Tractor Lookup Name: **Look up 2**
Tractor Identifier:
Tractor Plate: **Newplate**
Tractor Plate Province/State: **Nova Scotia**
Tractor Plate Country: **Canada**

Edit **Delete** < Back

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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*).

Delete Tractor Lookup [X]

Are you sure you want to permanently delete this Tractor Lookup?

Yes No

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. The top navigation bar includes 'Business Accounts' and 'My Profile' (circled). The main content area is titled 'Trade Document' and contains a table of submitted documents. The table has columns for 'Conveyance Reference Number (CRN)', 'Estimated Date/Time of Arrival', 'Number of Associated CCNs', 'Status Date/Time', and 'Effective Status'. Three documents are listed: 2471DRAFTCOMBINEDCRN (Cancelled), 2471123456789 (Accepted), and 2471123456 (Rejected). A 'Customize List/Tab' button is at the bottom left of the table. A vertical sidebar on the right contains 'Show Trade Document Shortcuts'.

Conveyance Reference Number (CRN)	Estimated Date/Time of Arrival	Number of Associated CCNs	Status Date/Time	Effective Status
2471DRAFTCOMBINEDCRN	2013-04-25 01:00 Eastern	1	2013-04-02 07:17	Cancelled
2471123456789	2013-04-25 01:00 Eastern	1	2013-03-28 09:40	Accepted
2471123456	2013-04-25 01:00 Eastern	1	2013-03-28 08:40	Rejected

Preferred Time Zone: Eastern

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*).

eManifest Portal **Canada**

Business Accounts **My Profile**

Home > My Profile

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

Edit My Profile

All fields are mandatory unless otherwise specified.

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

First Name:

Last Name:

E-mail Address:

Re-type E-mail Address:

Telephone Number:

Telephone Extension (optional):

Preferred Time Zone:

Preferred Language of Correspondence:

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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*).

The dialog box has a title bar 'Delete User Account' with a close button. The main text asks 'Are you sure you want to permanently delete your User Account?'. Below this, it states 'You will no longer have access to the eManifest Portal and the following Business Accounts:' followed by a scrollable list containing 'PORTAL 17(2471), PORTAL 18(5472), PORTAL FREIGHT FORWARDER 3(8666)'. At the bottom right, there are two buttons: 'Yes' (circled) and 'No'.

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.

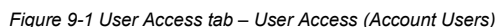


Only Account Owners or Proxy Account Owners will be able to perform these administrative functions.

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 Support Unit (TSU) 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.

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*).



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



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 Details

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 And Status

User Role: Account User

User Status: Active

Edit

Remove ...

< Back

Show Trade Document Shortcuts

Preferred Time Zone: Eastern

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).

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

Edit User Role and Status

Doe, John james

User Role: Account Browser
Account User
Proxy Account Owner

User Status: Active
Suspended

Submit Cancel

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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's a navigation bar with 'Business Accounts' and 'My Profile'. Below it, a breadcrumb trail reads 'Home > Business Accounts > PORTAL 17 (2471)'. On the right, it says 'Portal User(URN: PU029479)' with 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 'User Access' tab is selected, showing a 'User Details' section. This section contains the following information: 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. Below this is a 'User Role And Status' section with 'User Role: Account User' and 'User Status: Active'. At the bottom of this section is an 'Edit' button, which is circled in the image. Below the 'User Details' section are 'Remove ...' and '< Back' buttons. At the very bottom, 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).

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

Edit User Role and Status

Doe, John james

User Role: Account Browser
Account User
Proxy Account Owner

User Status: Active
Suspended

Submit Cancel

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).

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

Add User

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 - 2 of 2

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's a header with the eManifest Portal logo and the word 'Canada'. Below this is a navigation bar with 'Business Accounts' and 'My Profile'. The main content area is titled 'User Details' and contains the following information:

- 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 And Status:
 - User Role: Proxy Account Owner
 - User Status: Suspended

At the bottom of the user details section, there are two buttons: 'Edit' and 'Remove ...'. The 'Remove ...' button is circled in red. Below these buttons is a '< Back' button. 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?

☒ Yes ☐ No

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](#)

MessagesTrade DocumentsLookupsUser Access

User Access ?

Add User

#ABCDEFGHIJKLMNOPQRSTUVWXYZ

Users 1 - 1 of 1

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

Show Trade Document Shortcuts

Preferred Time Zone: Eastern

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*).

eManifest Portal

Canada

Business Accounts My Profile

Home > Business Accounts

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

Business Accounts ?

Create Business Account

Default log in Business Account: PORTAL 17 (2471) Save

Business Accounts 1 - 3 of 3

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

Preferred Time Zone: Eastern

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*).

eManifest Portal  **Canada**

Business Accounts ▾ **My Profile**

Home ▸ Business Accounts ▸ PORTAL 18 (5472) 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: **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**

Edit

Delete Business Account **< Back**

Preferred Time Zone: Eastern

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*).

eManifest Portal

Canada

Business Accounts ▾ My Profile

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

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

PORTAL 18 (5472)

Edit Account Owner Information ?

All fields are mandatory unless otherwise specified.

Position Title:

E-mail Address:

Re-type E-mail Address:

Telephone Number:

Telephone Extension (optional):

Fax Number (optional):

Address:

City:

Country:

Province/State (Canada/USA locations only):

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

Preferred Time Zone: Eastern

Show Trade Document Shortcuts

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*).



eManifest Portal

Canada

Business Accounts

My Profile

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

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

PORTAL 18(5472)

Modify Business Account

Account Owner Information

Business Information

Business Name: PORTAL 18

Client Identifier: 5472

Business Type: Bonded 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

Request Update

Delete Business Account

< Back

Preferred Time Zone: Eastern

Version: 2013-03-27

Figure 10-4 Business Accounts – Request Business Account Update

5. Select **Request Update**.

PROTECTION • SERVICE • INTEGRITY

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

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

Show Trade Document Shortcuts

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 Accounts

Home > Business Accounts

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

Business Accounts ?

Create Business Account

Default log in Business Account: PORTAL 17 (2471) **Save**

Business Accounts 1 - 3 of 3

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

Preferred Time Zone: Eastern

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*).

eManifest Portal Canada

Business Accounts My Profile

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

Business Accounts ?

Create Business Account

Default log in Business Account: PORTAL 17 (2471) Save

Business Accounts 1 - 3 of 3

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

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_portal_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

Show Trade Document Shortcuts

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.