



Broker Account Management

November 2019



U.S. Customs and
Border Protection





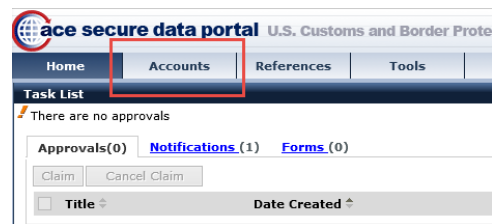
INTRODUCTION

There have been two changes to the process of uploading employee information with the mass update spreadsheet.

- You now enter current employment information in the **Employment History #1** section of the spreadsheet.
- ACE now maintains an employee history for broker employees. Therefore, the **Delete** function is no longer available in the mass update spreadsheet. When employees separate from the company upload a spreadsheet with an add/replace action for their records and include an **Employment End Date** for **Employment History #1**.

UPLOAD EMPLOYEES

1. Login to the **ACE Secure Data Portal**.
2. Select the **Accounts** tab.
The **Accounts** tab displays.



3. In the **Task Selector** panel, from the **Select Account Type View:** drop-down menu, select **Broker**.
4. In the **Task Selector** panel, select the **GO** button.
The broker view of the **Accounts** tab displays.
5. In the **Account Selector List** panel, select a broker account.
The broker's details displays in the **Broker** panel.
6. In the **Broker** panel, select the **Employees** tab.
The **Employees** tab displays with records of the broker's employees.





7. Select the **Upload Employees** button.

The **Upload File** section of the **Broker** panel displays.

[Contacts](#)
[Addresses](#)
[Licensed Brokers](#)
[Employees](#)
[Waiver Requests](#)
[Permit User Fees](#)

[Upload Employees](#)
[View Uploads](#)

Showing 1 - 4 of 4

Name	Street (Physical) Address
Employee01 Training	10409 MAIN ST FAIRFAX VA 22030-3314
Employee02 Training	10409 MAIN ST FAIRFAX VA 22030-3314
Employee03 Training	10409 MAIN ST FAIRFAX VA 22030-3314
Employee04 Training	10409 MAIN ST FAIRFAX VA 22030-3314

Broker

Upload File

File: [Browse...](#)

[Upload File](#)

[Download Template](#)

Batch Sequence #	File Name	Submit Date/Time	Status	Submitted By	Purge Date
OK					

8. Select the **Download Template** button.
- Based on your browser settings, the employee spreadsheet template opens or saves.
9. Fill out the spreadsheet with employee changes and save the file as **CSV** file type.



IMPORTANT: CSV is the only file type supported for batch uploading employees.

10. In the **Broker** panel **Upload File** section, select the **Browse...** button.

The **Choose File to Upload** dialog box displays.

11. Navigate to the location of and select the employee spreadsheet file.

12. Select the **Open** button.

The dialog box closes and the file path populates in the **File:** field.

13. Select the **Upload File** button.

The success message will display and a record displays in the employee submission table.

Broker

Upload Employees batch job has been successfully submitted

[Refresh](#)

Upload File

File: [Browse...](#)

[Upload File](#)

[Download Template](#)

Showing 1 - 1 of 1

Batch Sequence #	File Name	Submit Date/Time	Status	Submitted By	Purge Date
000000276	Upload Employees_2.csv	11/14/2019 10:55 AM	Received	Vinny Mince	02/12/2020

OK

14. Select the **Batch Sequence #** for the most recent employee submission.

The details of the employee submission displays in the **Broker** panel.





- 15. Select the **OK** button.
The employee submission section closes.
- 16. Select the **OK** button.
The **Upload File** section closes. Uploaded employees display in the **Employees** tab.

Broker

Update Employees Submission
Batch Sequence #: 000000276
Submit Date/Time: 11/14/2019 10:55 AM
Purge Date: 02/12/2020

Status: Complete with Warnings
Submitted By: [Vinny Mince](#)
Original File: [Upload Employees_2.csv](#)

Update Employees Results
Total # of Records: 1
Total # of Successes: 1
Total # of Warnings: 1
Total # of Errors: 0
Warning/Error Detail: [000000276_Results.csv](#)

[Contacts](#) [Addresses](#) [Licensed Brokers](#) **Employees** [Waiver Requests](#) [Permit User Fees](#)

Showing 1 - 5 of 5

Name	Street (Physical) Address	Telephone
Employee01 Training	10409 MAIN ST FAIRFAX VA 22030-3314	
Employee02 Training	10409 MAIN ST FAIRFAX VA 22030-3314	
Employee03 Training	10409 MAIN ST FAIRFAX VA 22030-3314	
Employee04 Training	10409 MAIN ST FAIRFAX VA 22030-3314	
Employee05 Training	10409 MAIN ST FAIRFAX VA 22030-3314	

