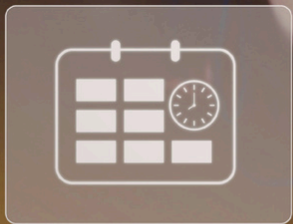
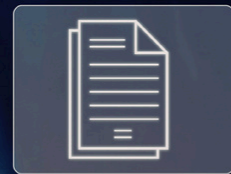


Creating Custom ACE Reports



1. Tip

- When you log into ACE and ACE Reports, stay on task and don't get distracted. The longer you stay in ACE, the more likely you are to encounter problems; the longer it takes to load new screens, the more likely you are not to save your work, etc.
 - We need to be patient with ACE, but it is not patient with us.
- What works in the Importer "universe" does not necessarily (think also "normally") work in the Exporter "universe".
 - Importer and Exporter reports are very different.
 - You can't run an Exporter report if you enter the ACE reports section from the Importer "account".

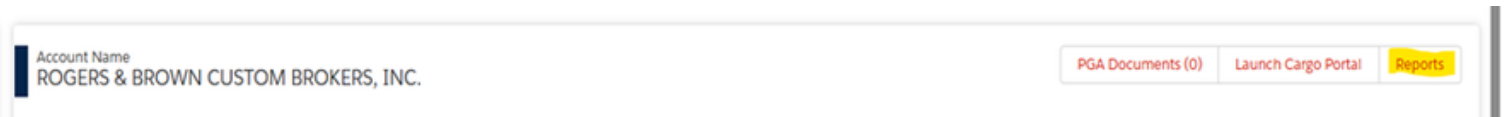
2. Log in to ACE (user-name and password)

- Get your Security token email and enter the token code into ACE.

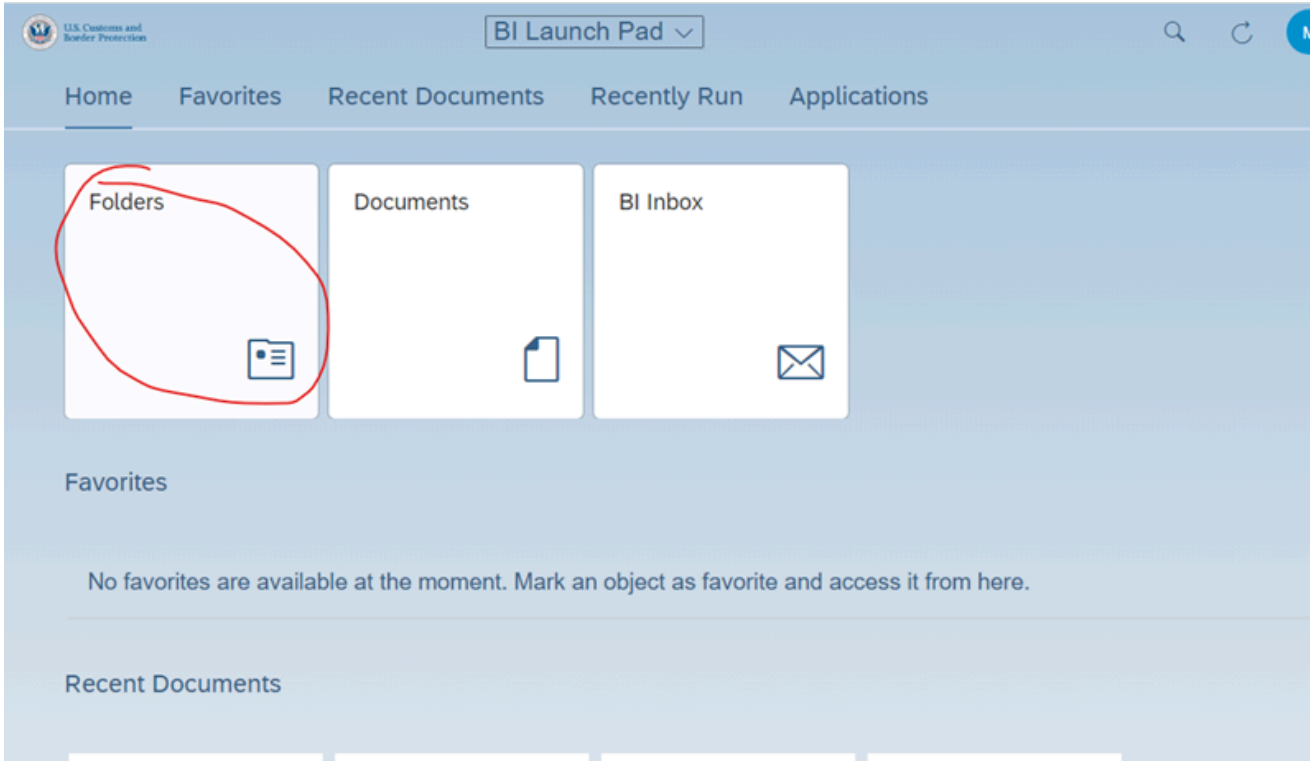
3. Go to Accounts



- ## 4. Select the Importer or Exporter Account you want (or other account) and click on "Reports" to the right of the screen.

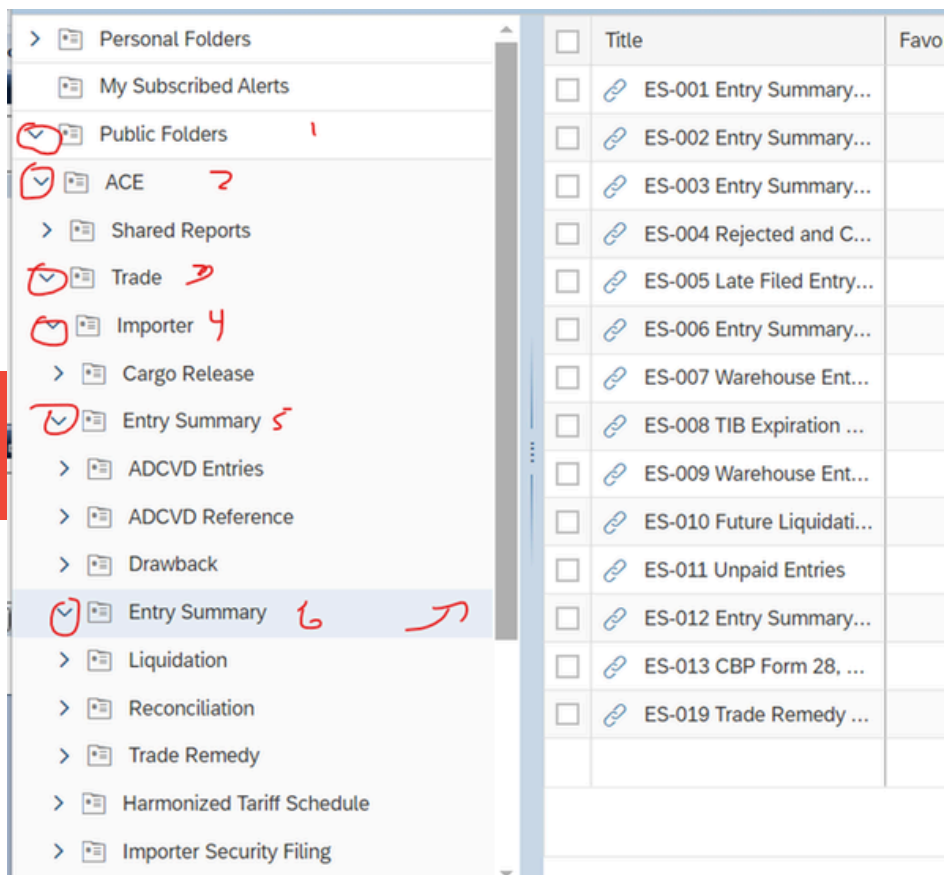


5. A new window pops up. Select Folders

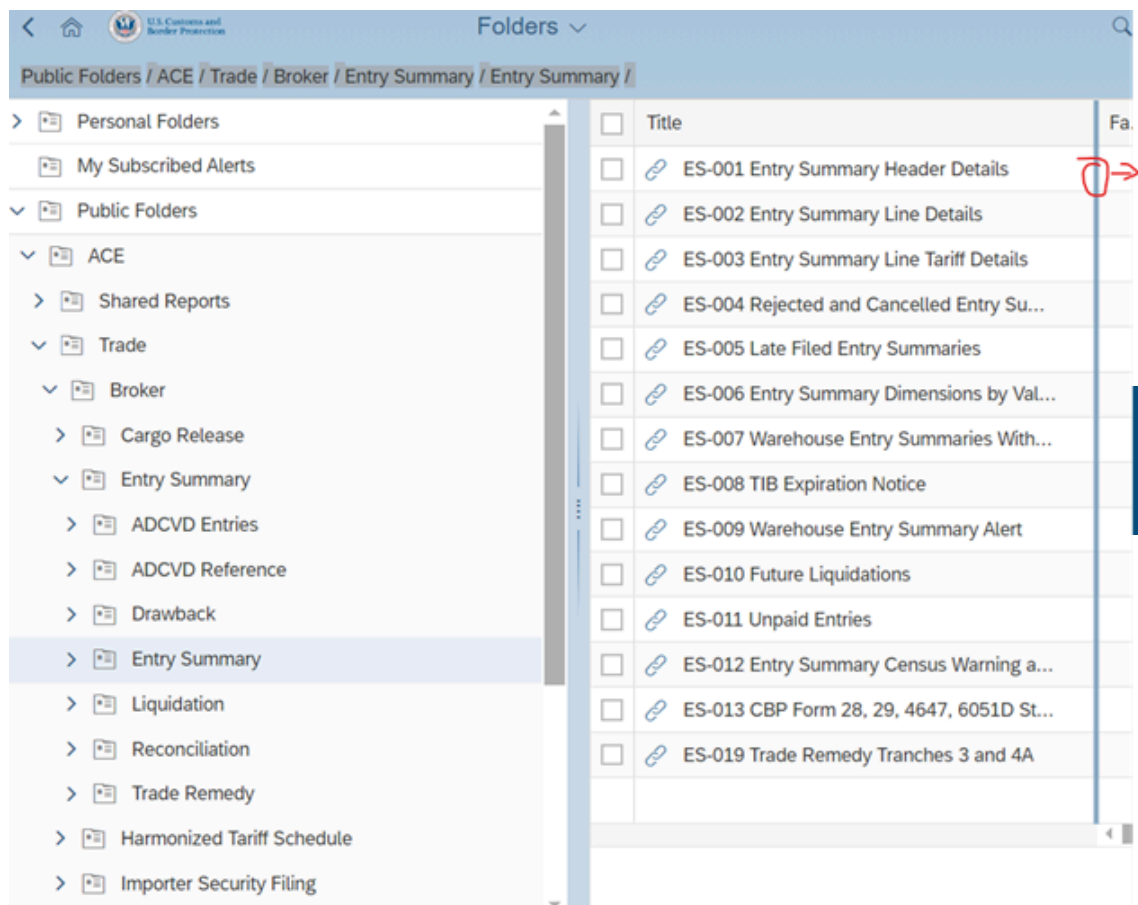


6. Select 1) Public Folders, then 2) ACE, then 3) Trade"; from here decide what information you want:

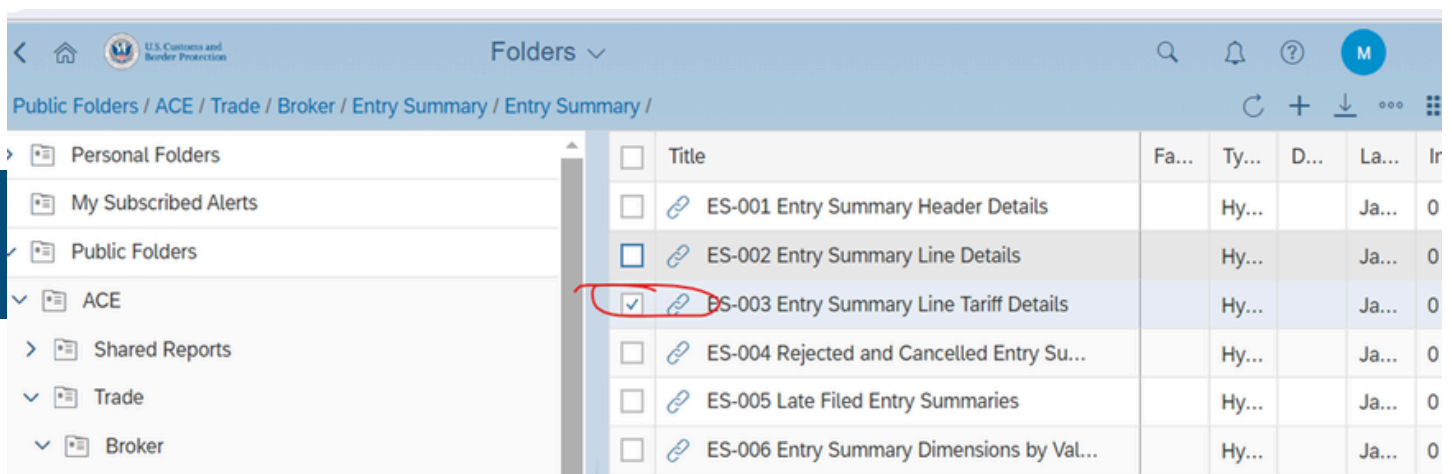
- For Entry Summary data: select Importer, Entry Summary, then Entry Summary (again)



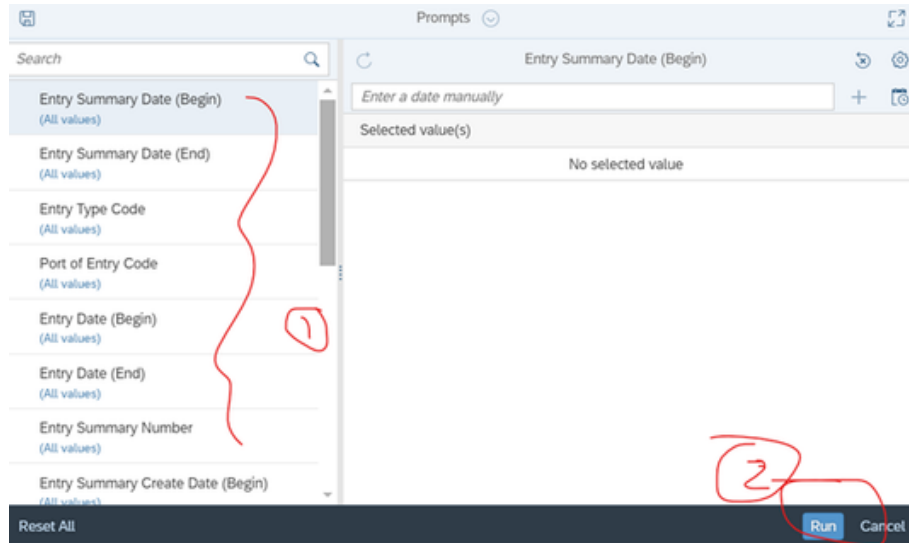
7. On the right side, you can move the column divider to the right to read the full report titles:



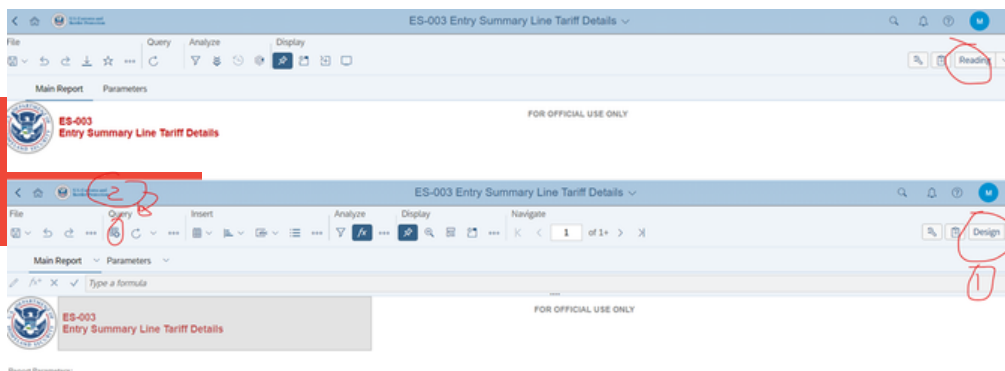
8. Click the box of the report you want:



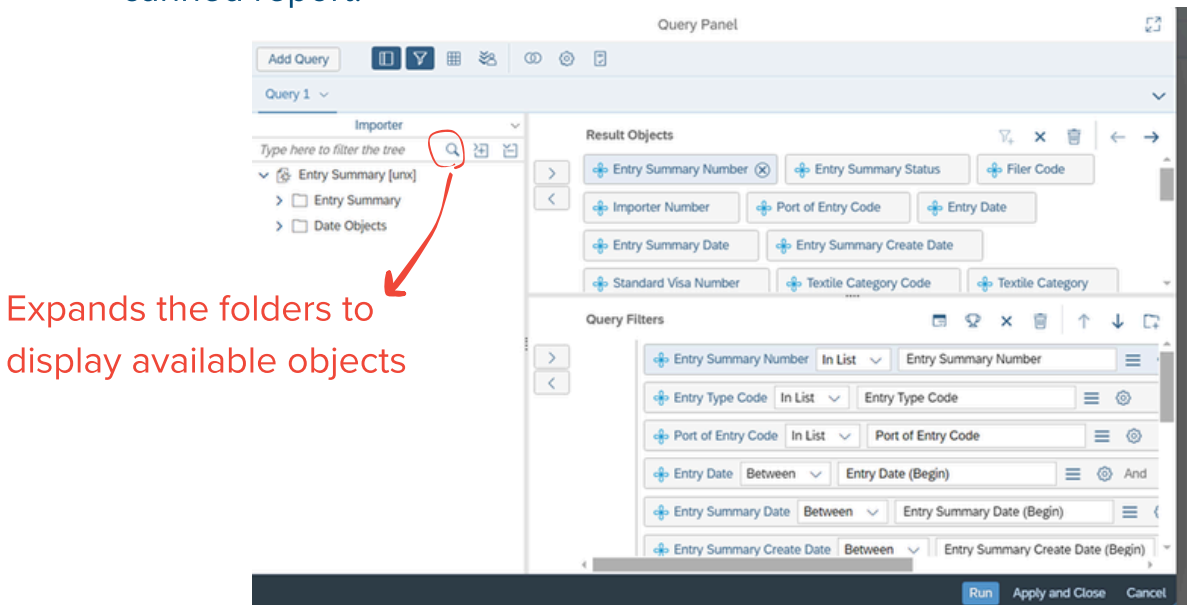
9. This brings you the standard report, with the standard prompts. Enter the values you want and hit “Run” in the lower left.



10. A canned report will run. In the upper right, change “Reading” to “Design”, then select the “Query” icon.

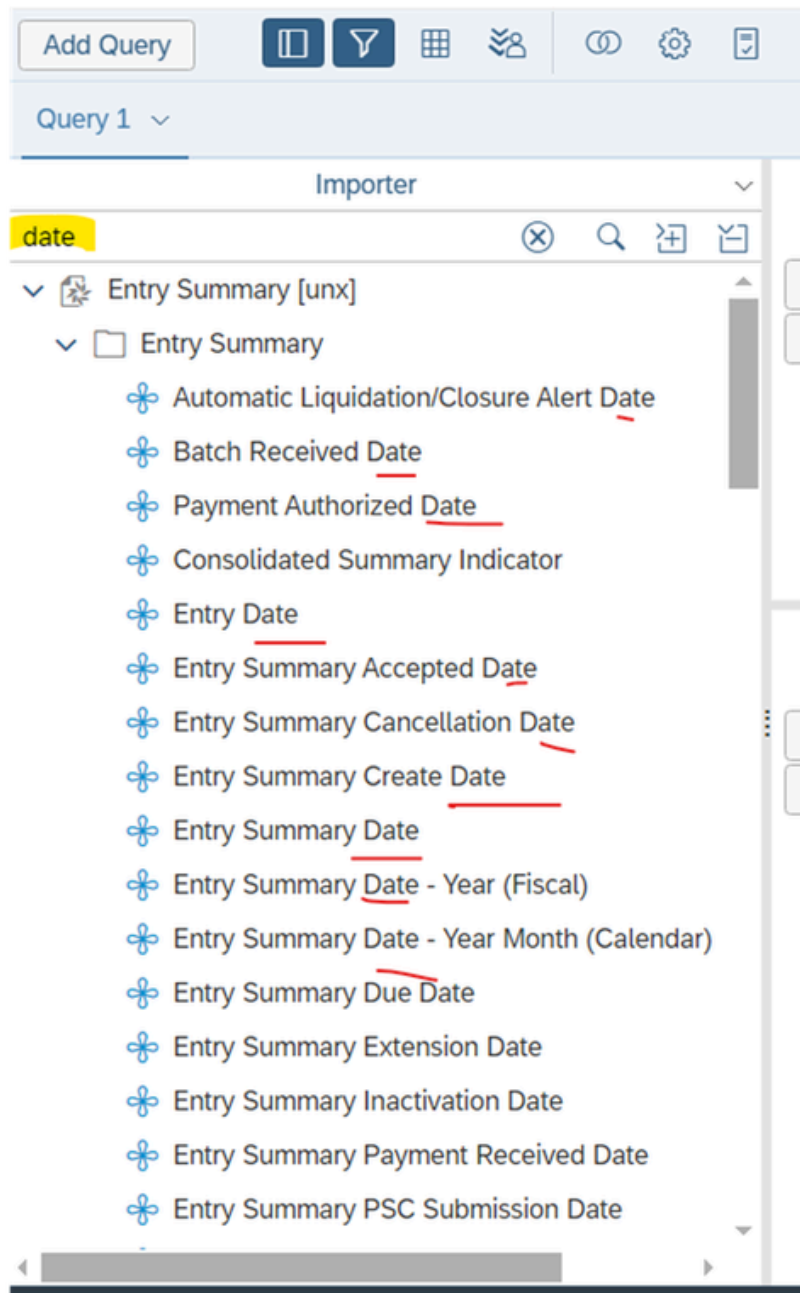


11. This will bring up the columns/data elements and queries associated with the canned report.

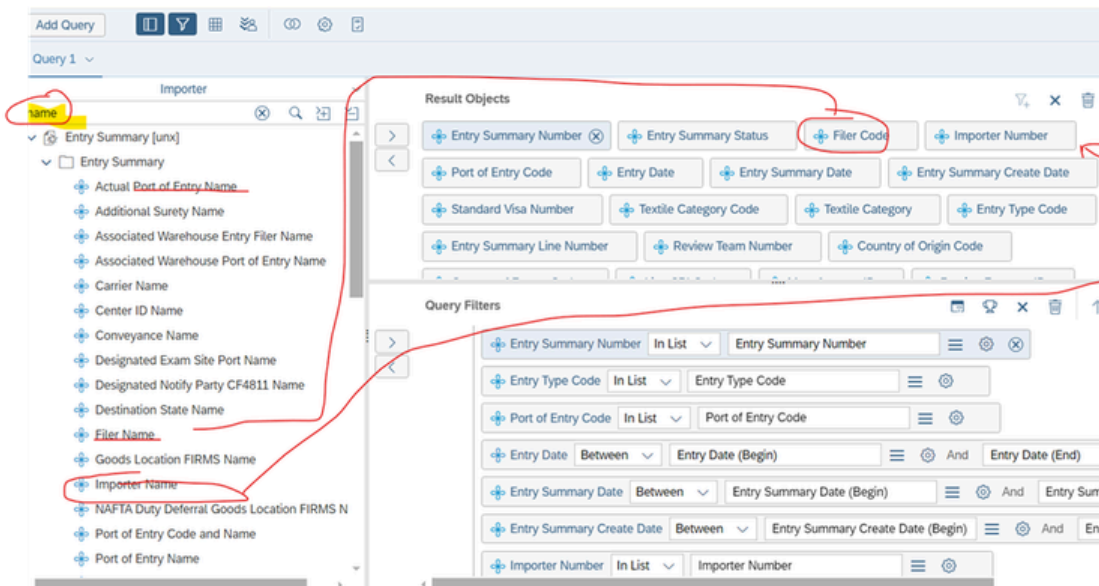


12. Modify this report to add the fields or queries you want/remove the ones you don't want. It can be faster to find available data elements by using the magnifying glass search feature. For example to see all the possible data elements associated with dates, search for "date":

- (You can also drag and drop data objects to the result objects pane and use the arrows to move the order of objects, or click and drag objects. You can select and remove an icon to remove an object.)



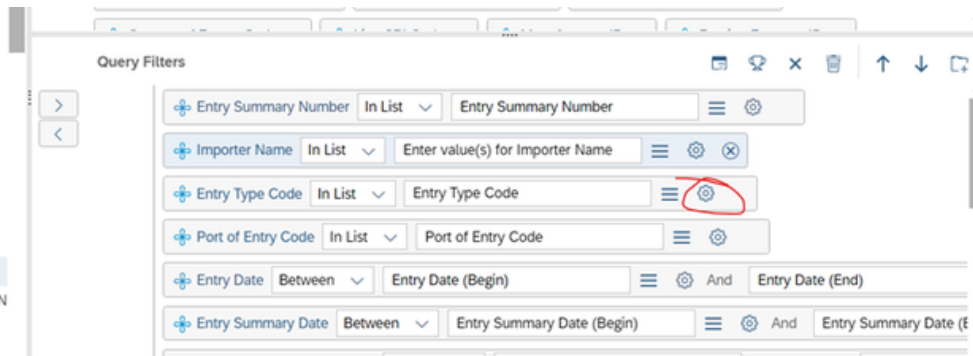
13. Or Search for "name"



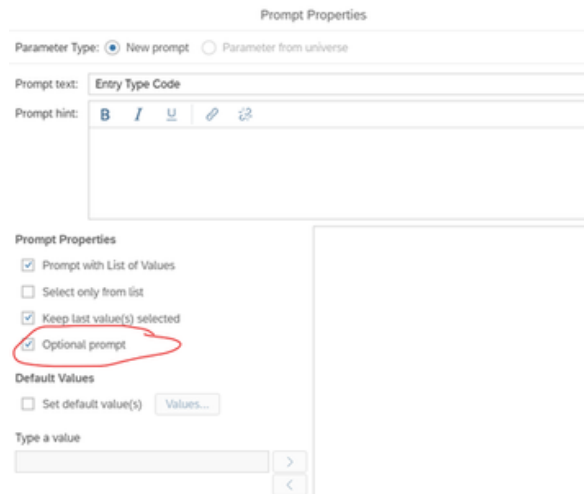
14. You can then replace data elements with “code” or “number” with the “names” so you don’t have to remember so many codes/numbers.

15. You can also remove the queries you don’t want.

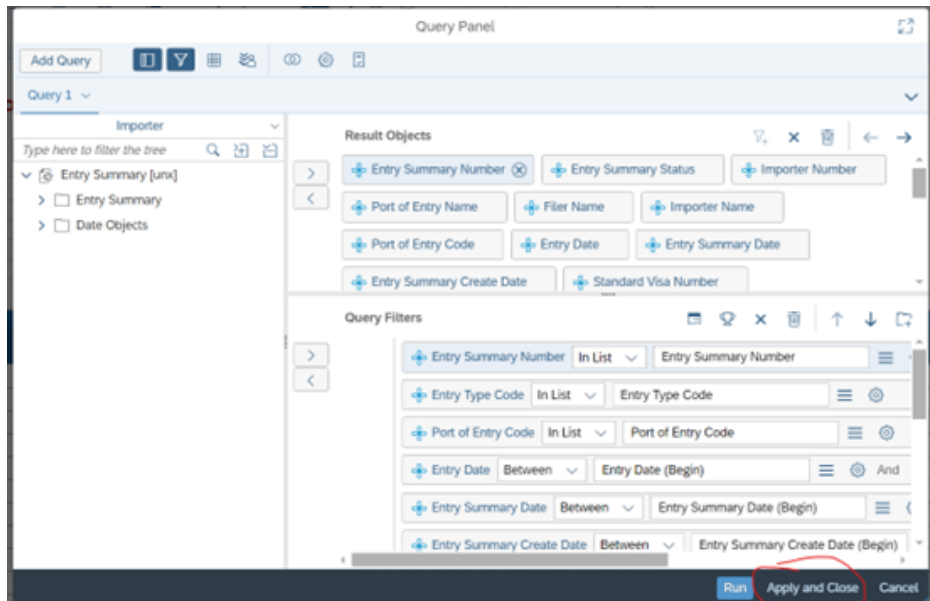
- If you’re running a report for specific Importers of Record, make sure you use the right format (00-0123456789).
- Also, if you want the option to include some queries (like a query for a report that you only use sometimes, then select the gear symbol at the end of the query:



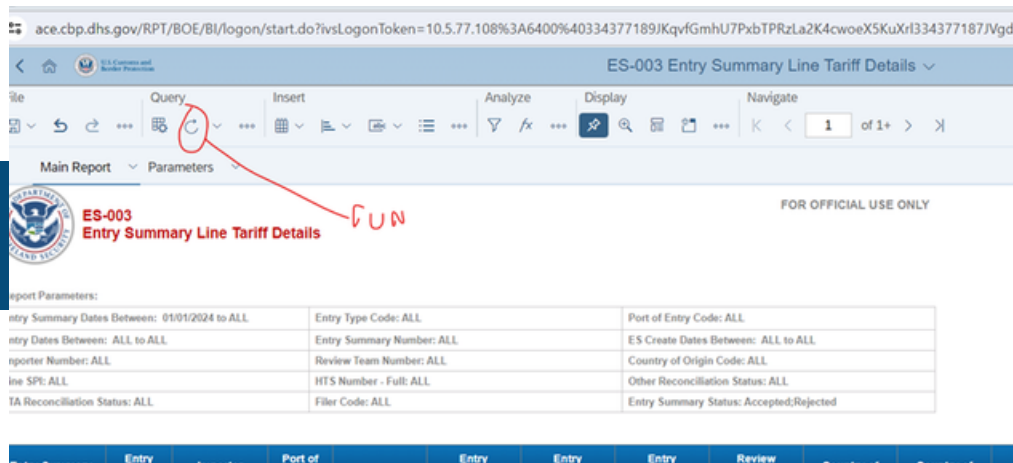
- Make sure “Optional Prompt” is selected.



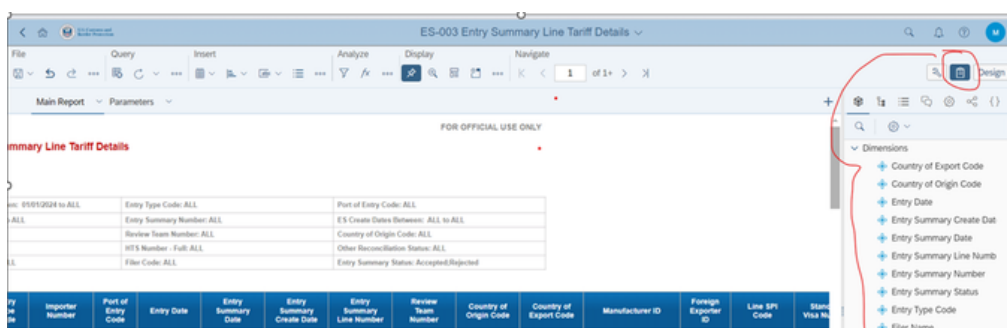
16. When you are done with your changes, select “Apply and Close” in the lower left corner. ACE Reports says this is better than “Run” (for some reason).



17. Your report will not yet reflect the changes. Select Run in the Query toolbar and answer your query prompts:



18. If you add data elements, then you need to go back to the report view and select the clipboard:



19. Click on the new Data elements and move them where you want them in the report:

Report Parameters:

Entry Summary Dates Between: 01/01/2024 to ALL	Entry Type Code: ALL	Port of Entry Code: ALL
Entry Dates Between: ALL to ALL	Entry Summary Number: ALL	ES Create Dates Between: ALL to ALL
Importer Number: ALL	Review Team Number: ALL	Country of Origin Code: ALL
Line SPI: ALL	HTS Number - Full: ALL	Other Reconciliation Status: ALL
FTA Reconciliation Status: ALL	Filer Code: ALL	Entry Summary Status: Accepted/Rejected

Entry Summary Number	Entry Type Code	Importer Number	Port of Entry Code	Entry Date	Entry Summary Date	Entry Summary Create Date	Entry Summary Line Number	Review Team Number	Country of Origin Code	Country of Export Code	Manufacturer ID	Foreign Exporter ID
01	01	3001	3001	12/12/2023	01/05/2024	12/19/2023	1	888	XO	CA	KODENGRS4959W	
01	01	3001	3001	12/18/2023	01/02/2024	12/29/2023	1	888	CN	HK	HKBJAU729HON	
01	11	3001	3001	12/18/2023	01/02/2024	12/29/2023	1	888	CN	HK	HKBJAU729HON	
01	11	3001	3001	12/18/2023	01/02/2024	12/18/2023	1	888	DE	DE	DEPOLPLAZ2LOH	
01	01	3001	3001	12/07/2023	01/04/2024	12/19/2023	1	888	XO	CA	XDFORND18FT	
01	01	3001	3001	12/27/2023	01/10/2024	12/28/2023	1	888	XO	CA	XDFORND18FT	
01	01	3001	3001	01/04/2024	01/18/2024	01/03/2024	1	888	XO	CA	XDFORND18FT	
01	11	3001	3001	01/05/2024	01/19/2024	01/03/2024	1	888	TW	CA	XDBCSGNT390VAU	
01	11	3001	3001	01/05/2024	01/19/2024	01/03/2024	2	888	TW	CA	XDBCSGNT390VAU	
01	01	3001	3001	01/06/2024	01/19/2024	01/04/2024	1	888	DE	CA	KODENGRS4959W	
01	01	4101	4101	01/11/2024	01/05/2024	01/05/2024	1	888	CH	CH	CHMTCHSELEN	
01	01	3901	3901	01/10/2024	01/04/2024	01/09/2024	1	888	US	CN	ONTGAUTTAN	

20. The Wrench symbol in the upper left is used to format the data in the report.

Design

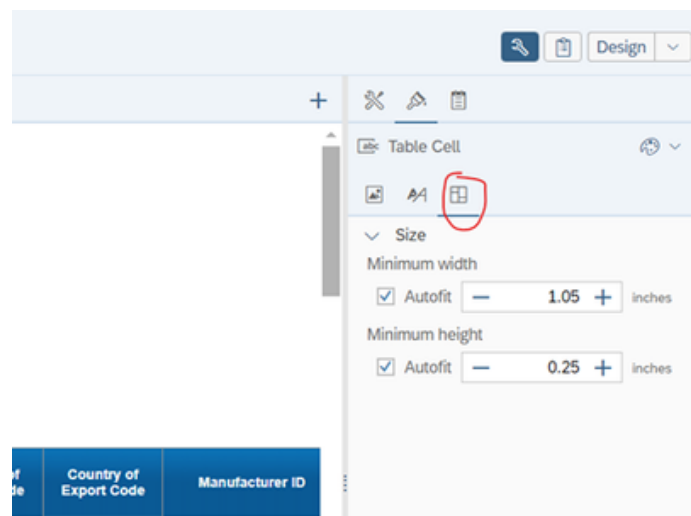
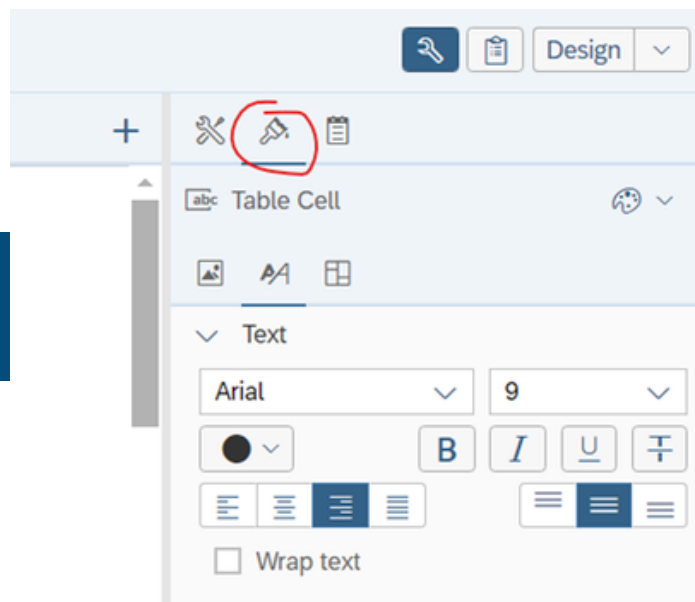
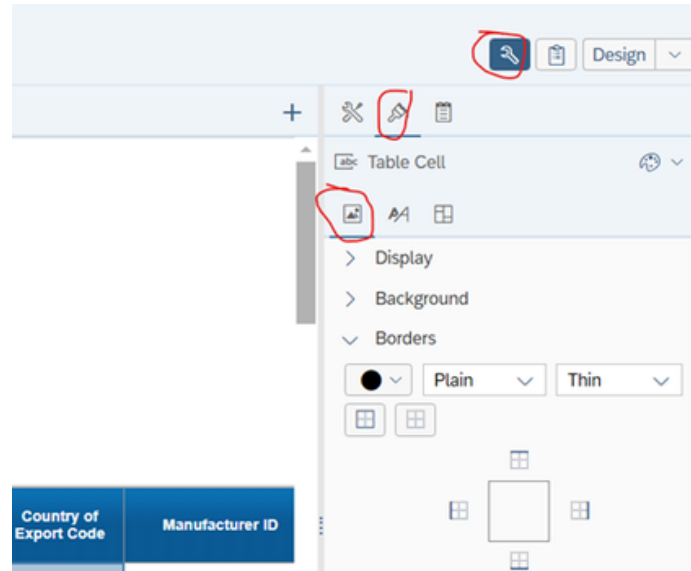
Main Report

General

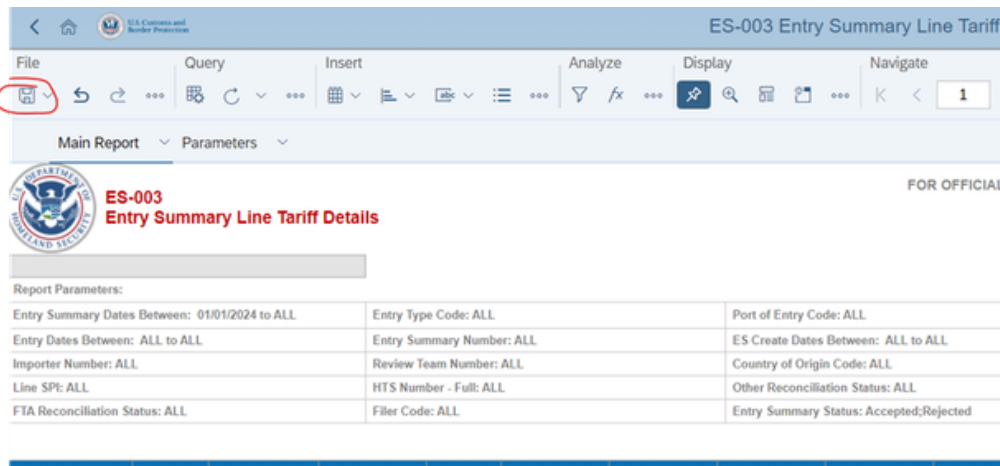
Description

Enter report description

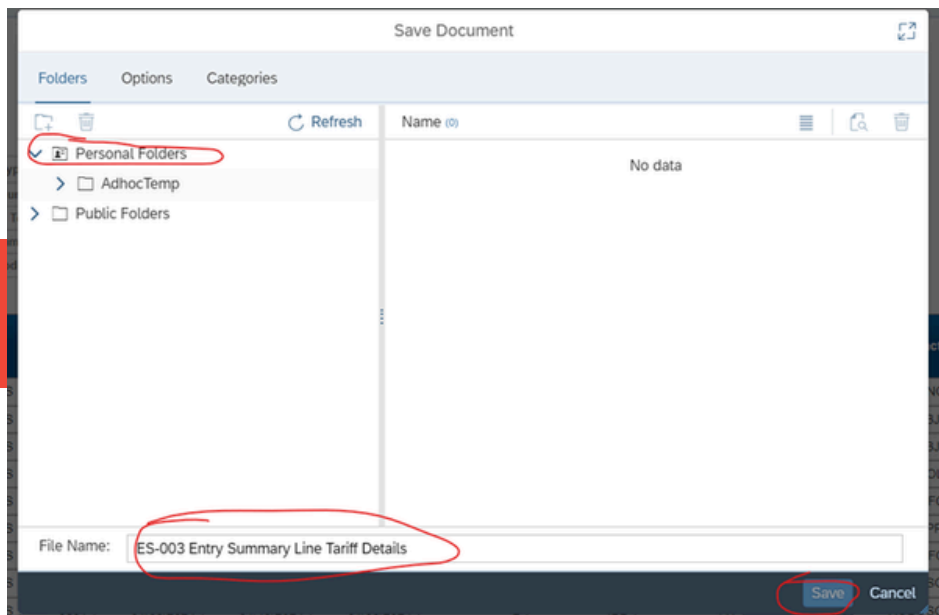
21. If you select a column in the report to format, the formatting options change:



22. Remember to Save (“Save As”) your report:



a. Make sure to give the pop-up window time to load. Then select “Personal Folders”, modify the name of the report as needed, then “Save” in the lower left corner:



23. You can always go back to the Report Folder with the left arrow (you can do this within the report).

