



# Registering a Business on the CBSA Assessment and Revenue Management (CARM) Client Portal

Have the following information on hand before you start.

## 1. Identify your Business Account Manager (BAM)

The Business Account Manager handles all activities related to the business account in the CARM Client Portal (CCP). **The first individual who links their account to the business becomes the Business Account Manager.**

Name: \_\_\_\_\_ Email: \_\_\_\_\_

## 2. Each user needs to create a user profile within the CCP using one of the sign-in options. This includes the Business Account Manager.

GCKey ([GCKey - FAQ \(clegc-gckey.gc.ca\)](#)) and Sign-in Partner ([Sign-in Partners Help and FAQs - Canada.ca](#)) are authentication processes. These processes allow an individual access to Government of Canada online portal accounts. Users may:

- Use an existing GCKey that has been created for other Government of Canada portals (except for a CRA GC Key), or create a new GCKey for the CCP.  
(Please note that your log in credentials for your Canada Revenue Agency (CRA) account will not work in the CARM Client Portal)
- Use the Sign-In Partner where users authenticate themselves using their own banking credentials

A multi-factor authentication page will prompt the user to enter an email address. This email address will be used to send a six digit passcode. This passcode will need to be entered to log in to the CCP.

Once the Business Account Manager has selected their user credentials, they will create a user profile in the CCP. The Business Account Manager **does not submit an “Employee Access Request”**. Instead, the Business Account Manager selects “Register my business” at the initial setup screen.

It is highly-recommended to assign more than one Business Account Manager. The primary Business Account Manager can grant permission to another Business Account Manager after the account is set up.

## 3. Have your Business Number (BN9) and importer/exporter program account identifier (for example: RM0001) information ready.

This number may be found on Canada Border Services Agency (CBSA) related documents such as a completed B3 Canada Customs Coding form, a Daily Notice, a Statement of Account, a completed B2 Adjustment Request, and/or a Detailed Adjustment Statement (DAS).

BN9 (9 digits): \_\_\_\_\_ RM (4 digit): \_\_\_\_\_

If your business does not have a business number (BN), OR the business has a business number, but not an importer/exporter program account (RM), you will need to register with the CRA: [How to register for a business number or Canada Revenue Agency program accounts - Canada.ca](#)

#### 4. Find the following business information.

**Important:** For security purposes, the BAM will need to enter information to authenticate that they are a delegated individual of the company. CBSA will then allow the activation of the business account in the portal.

The following information must **match exactly** to CRA/CBSA records.

**Legal entity name or operating name of the business:** The legal name/operating name may be found on CBSA related documents. Related documents include Daily Notice, Statement of Account, and/or Detailed Adjustment Statement (DAS).

Legal Name/Operating Name: \_\_\_\_\_

**Full physical or mailing address of the legal entity (BN9 address):** The legal address may be found on CBSA related documents. Related documents include Daily Notice, Statement of Account, and/or Detailed Adjustment Statement (DAS).

Street and Number: \_\_\_\_\_

City: \_\_\_\_\_

Province/State: \_\_\_\_\_

Country: \_\_\_\_\_

Postal/Zip Code: \_\_\_\_\_

#### 5. Have the following information ready.

**You will be asked to answer two of the following three questions regarding your business.**

Based on the activity of the RM account chosen, you may only be asked to answer one question. Only the questions that apply to the chosen RM account will be presented. If there hasn't been any activity on the account, you will not be required to answer the questions.

1. **Duties and taxes payment:** The CCP will ask you to provide a transaction number and the total duties and taxes for a B3, Canada Customs Coding form, that was previously accepted by the CBSA.

Zero dollar (\$0.00) amounts **are allowed**. For the payment, the number should be entered without commas or other symbols. (123456.01)

Your customs broker may be able to assist you in determining the correct amount.

Transaction Number	Field 51 – Total Duties & Taxes
_____	\$ _____.

2. **Payment amount:** The CCP will ask you to select a date (MM/YYYY) and enter a payment amount made on the chosen date. For the payment, the number should be entered without commas or other symbols. (123456.01)

Date (MM/YYYY)	Payment Amount
_____	\$ _____.

3. **Statement of Account balance:** The CCP will ask you to select a date (MM/YYYY) and enter the Statement of Account balance for the chosen date.

(Zero dollar (\$0.00) amounts **are not accepted.**)

For the Statement of Account Balance, the number should be entered without commas or other symbols. (123456.01 or -123456.01 (if negative))

Date (MM/YYYY)

Statement of Account Balance

\_\_\_\_\_

\$ \_\_\_\_\_.

Importer Statement of Account:

*Ex. Importer uses their own Statement of Account (SOA) or Broker uses their own Importer SOA*

- Add up lines “I. Importer Total Payable” & “J. Broker Total Payable” to obtain the SOA balance. If it is positive or negative, this is an answer the system will accept.
- If a zero dollar balance is found on the SOA, it will not be accepted and client is asked to go back to a previous month or pick any other month with a balance within the time period. If none are found, client should use another question.

Broker SOA:

*Ex. Broker uses Broker SOA to provide balance to importer or Broker uses Broker SOA to find balance for their own importer account.*

- The broker can search for the BN15 on the Broker SOA and use line “I. Importer Total Payable”. If this amount is positive or negative, the system will accept this answer.
- If the importer has multiple brokers, amounts showing for any broker will be accepted. Dollar amount can be positive or negative.
- If a zero dollar balance is found on one of the Broker SOAs, the importer could try another customs broker or use another affinity question. Zero dollar balances **are not accepted**.

If you are not successful in activating your business account, contact the CARM Client Support Help Desk. You can contact the CARM Client Support Help Desk by completing the web contact form, link provided below. Select the topic of “Online portal support” and “CARM Client Portal – setting up my business account”. Include a description of: “I require assistance activating my business account.” Once we receive the request, we will contact you to follow through on next steps.

**You are now ready to [log on to the CARM Client Portal](#) and begin the registration process.**

### **CARM Client Support Helpdesk**

Hours of Operation: Monday to Friday, 7 am to 5 pm ET

[Web Contact form](#)

**Telephone:** 1-800-461-9999, press Option 2 for CARM assistance