



CARM Client Portal

User Guide

Register my business with an
existing importer-exporter RM
(Scenario 3)

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Purpose of this guide

This guide explains how to register your business and existing active importer-exporter RM program account on the CARM Client Portal. This is referred to as a Scenario 3 registration in the [First time set up – Register my business scenarios](#) user guide. The First time set-up user guide also provides information on how to make a Status Check enquiry to verify if the business already has an existing CBSA program account, and whether or not it is active.

As you complete this registration, it is required to fill in every line that has a red asterisk. Click on the drop down arrow to see all of the available options.

Audience

This guide is for CBSA clients who have an active importer-exporter program account which was obtained prior to October 21, 2024, and have not yet registered in the CARM Client Portal.

If your business does not have a 9 digit business number see [First time set up – Register my business scenarios](#) user guide to find the scenario that applies to your business.

This option is intended for authorized users with access to privileged information and will allow the user to set up and complete registration for a business on the portal. If you are an employee and want to find a business already registered on the CARM Client Portal, see [Onboarding to the CARM Client Portal](#) user guide.

It is important to note that the user who completes the registration of the business on the CARM Client Portal will automatically become the associated Business Account Manager (BAM), or the person with ultimate account authority. A business account can only be registered once, but its Business Account Manager can assign other users a BAM role (or other user roles) through the employee management page.

Contact

Contact the [CARM Client Support Helpdesk](#) if you need additional support.

1. Register my business on the Portal

1. From the CBSA website, you need to [Log in to the CARM Client Portal](#) and complete the steps to access the system and complete your profile.

The screenshot shows the CARM Client Portal homepage. At the top, there is a 'MENU' dropdown and a 'Home' link. The main heading is 'CARM Client Portal' with a subtitle: 'View public information related to the CARM Client Portal; Login or register for a portal account.' Below this, there are two main sections: 'Services and information' and 'Most requested'. The 'Services and information' section includes links to 'Log in to the CARM Client Portal' (highlighted with an orange box), 'User guides', 'List of Licensed customs brokers', 'Bulletins', 'CARM API Catalogue', and 'Frequently asked questions (FAQs)'. The 'Most requested' section includes links to 'Log in to the eManifest Portal', 'Log in to the Trusted Trader Portal', and 'Get started with CARM'.

Note:

To access the portal, individuals must first open the CBSA webpage, using this link:

[Click here to access the CARM Client Portal](#)

For more information, please refer to the user guide [Onboarding to the CARM Client Portal](#).

2. Select **Register my business**.

The screenshot shows the 'First time setup' page. It has two main columns. The left column is titled 'Request access to my employer' and contains a question: 'Are you an **employee** who needs to be associated to your employer's registered business?' followed by a note: 'You will need to know your employer's 9-digits business number (BN9)'. Below this is a section titled 'Find a business' with a text input field for 'Business number (BN9) (maximum 9 characters) (required)' and a 'Search' button. The right column is titled 'Register my business' and contains a question: 'Are you a **business account manager** who wants to use the commercial client portal for your business?' followed by a note: 'You will need to have access to privileged information for this process.' At the bottom of the right column is a 'Register my business' button.

3. To register your business, confirm that you have a **business number (BN9)** by selecting **Yes**. Your business number (BN15) includes the 9 digit business number, 2 letters (RM) as the program identifier and the 4 digit reference number.

Portal requirements

Contact support

For information and assistance with registration, contact the CARM Client Support Services Help Desk at 1-800-461-9999.

To request access to the portal you will need a **Business Number** and **program account number (RM)**.

A Business Number is a 9-digit number assigned by the Canada Revenue Agency (CRA). It is the standard identifier for businesses and is unique to a business or legal entity.

A program account number is represented within the Business Number RM Account (BN15). It is a 15-digit number assigned by the Canada Revenue Agency (CRA), made up of the business 9 digit business number followed by a 6 digit alpha-numeric number used to identify the business's program accounts.

An example of a Business Number RM account

Business number									Reference number					
1	2	3	4	5	6	7	8	9	R	M	0	0	0	2

Program identifier

Service not available

Due to daily maintenance activities, the registration and enrolment services are not available between **3am and 6am** (Eastern time).
You cannot submit a request to register or enrol in a new program during these times.

Requirements Validation

*** Do you have a business number (BN9)? (required)**
☒ Yes
☐ No

← Previous

Next →

Note:

Be sure you are following the correct registration scenario - if you have a BN9, with no importer or exporter RM, **but do have a CBSA program ID** (like a carrier or warehouse), please do not onboard / register your business until you have followed the steps found in [First time set up – Register my business](#) user guide, Scenario 4.

4. The existing RM must be active, ensure you select **Yes** to having an RM, otherwise an error message will be triggered. Click **Next**.

Requirements Validation

*** Do you have a business number (BN9)? (required)**
☒ Yes
☐ No

*** Do you have a program account number (RM)? (required)**
☒ Yes
☐ No

Program account number (RM)

The program account number (RM) is used to identify your CBSA program(s) (e.g. Importer program, Customs Broker program, etc.)

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5. Click **Continue**.

Portal requirements

You have indicated that you have a **Business Number** (BN9) and a **program account number** (RM).

Before continuing, you will need to link your business to the portal.

← PreviousContinue

6. Fill in your business information.

Validate business information

Fill in the fields below to validate your business. If you encounter errors, make sure you have entered the exact legal entity name for your business.

If you are a sole proprietor, use your personal legal name (for example, Jane Doe). In all other scenarios, you should use the legal corporate name of your business (for example, ABC Incorporated).

Contact support

For information and assistance with registration, contact the CARM Client Support Services Help Desk at 1-800-461-9999.

* Legal entity name or Operating name (max. 175 characters) (required) ⓘ

* Select your ownership type (required)

Select from list ▼

* Business number (999999999) (required) ⓘ

* Program reference number (RM1234) (required)

RM

Note:

Input your business information. Ensure it is identical to the information that the Canada Revenue Agency (CRA) has on file about your company. You will get an error message if you input anything different from the CRA's information.

7. Fill in the **Legal entity address details** and click **Next** to continue.

The screenshot shows a web form titled "Legal entity address details". Below the title is a small instruction: "Enter the physical or mailing address of the legal entity (BN9) that is currently on file with the Canada Revenue Agency (CRA)." The form contains several fields: "Address Line 1 (required)" with a red asterisk and a help icon, "Address Line 2" with a help icon, "City (required)" with a red asterisk, "Country (required)" with a red asterisk and a dropdown menu labeled "Select a country", "Postal/Zip code", and "Certification (required)" with a red asterisk. The certification section includes a checkbox labeled "I, SI" and a text line "e, certify that I am hereby authorized to act on behalf of the business to conduct trade activities with the Canada Border Services Agency (CBSA)". At the bottom are "Previous" and "Next" buttons.

8. You may need to answer one or more questions about your account:

- The date (MM/YYYY) and the balance of one Statement of Account (SOA) within the last six years of the current date
- The date (MM/YYYY) and the exact amount of one payment that has been applied to your account within the last six years of the current date
- The transaction number and the total amount of duties and taxes for one import accounting transaction accepted by the CBSA within the last six years of the current date

You can find the information to answer these questions on a Daily Notice or Statement of Account that is up to six years old. You can get these from your broker if you do not have them already. Your answers must be identical to what is in these documents. Enter it with only using numbers and decimals. **Do not use dollar signs or commas.**

Select the question(s) you will answer from the pull down menu(s) provided. See below for examples of each of these three questions and how to answer them. (The screenshot below shows two questions being asked.)

The screenshot shows a web form titled "Validate your transaction information". Below the title is an instruction: "Answer the following question(s) for the identified program account. If you encounter errors, make sure you have entered the appropriate answer." Below this is the text "Business number RM account 123456158RM0001". The form contains two dropdown menus: "Question 1 (required)" and "Question 2 (required)", both with a red asterisk and a dropdown arrow. At the bottom are "Previous" and "Next" buttons.

9. Question: SOA balance from last 6 years.

Enter the date of one SOA from the past six years, then enter the balance of that SOA in the space provided.

Balance of a Statement of Account (SOA) back to 2016-10-17

* Statement of Account (SOA) Date (required) ⓘ

09/2022 ⓘ

* Statement of Account (SOA) balance (required) ⓘ

4300.00 \$CA

10. Question: Payment amount and date.

Enter the Payment date and Payment amount accepted by the CBSA in the past six years.

* Question 1 (required)

Provide an exact amount of a payment that has been applied to your account since 2016-10-17

* Payment date (required) ⓘ

09/2022 ⓘ

* Payment amount (required) ⓘ

4300.00 \$CA

11. Question: Total duties and taxes for an import accounting transaction.

Enter the total amount of duties and taxes for an import accounting transaction accepted by the CBSA in the past six years. With the current system if you use a transaction number that starts with 00000, do not type in those 5 zeros.

The total amount of duties and taxes for an import accounting transaction accepted by the CBSA from 2016-10-17 to current

* Transaction number (required) ⓘ

12155538621212

* Total amount of duties and taxes (required) ⓘ

-9876.00 \$CA

Important note:

Enter all figures in Canadian dollars (\$CA, or CAD). Transactions and SOAs used for these questions must be dated in the six calendar years prior to the day that you make these entries.

12. Click **Next** to continue.

← Previous

Next →

13. Fill in the required business information and the **Authorized official 1** who will have financial control over this business number. It is possible to add another official.

Company officials

CBSA requires the details company officials as a matter of financial control. You must provide the details of at least one authorized company official.

Requirements

Authorized company official(s) are required for financial control when obtaining and posting surety bonds for the purpose of transacting in bonded operations (e.g. bonded transporter or Release Prior to Payment). The designated official's title and name will be affixed to all surety bond submissions.

Authorized official 1

14. Once completed, click on **Next**.

Authorized official 1

Same As

* Title (required)

* First name (required)

* Last name (required)

* Email address (required)

* Confirm e-mail address (required)

* Telephone (required)

Extension

Fax

* Language preference (required)
☐ English
☐ French

15. Fill in the information required for step **Generic business contact information**.

Contacts

Provide information of one or more person(s) that the CBSA may contact regarding this request for program enrolment

Generic business contact information

*** Email address (required)**

*** Confirm e-mail address (required)**

*** Telephone (required)**

Canada +1

(519) 271-8899

Extension

Fax

Website

*** Language preference (required)**

☒ English

16. Fill in the information required for **Contact 1**.

Provide information of one or more person(s) that the CBSA may contact regarding this request for a business number

Contact 1

* Contact type (required)
Finance

* Title (required)
Select from list
Clerk
Dispatcher
Employee
Manager
Officer
Secretary
Supervisor
Other

* Confirm e-mail address (required)

* Telephone (required)

Extension

17. Once completed, click on **Submit**.

Add another contact

Previous

Submit

18. Review your business information and click **Confirm**.

Confirm registration

Review the business information provided and confirm registration.

As a result of this process, you will be assigned the role of business account manager for this account. The **Setup my portal** section can be used to give your employees or representatives access to your program account(s).

Business number	Legal entity name
123456158	T&P Customs Brokers

Identified program account(s)

The following programs were found to be associated to your business. If the information below is incorrect, please contact the CBSA at 1-800-461-9999.

Program Account Numbers
123456158RM0001
123456158RM0002
123456158RM0003

[← Previous](#)[Confirm](#)

Note:

If any information shown on this screen is incorrect or any of your existing CBSA program accounts are missing, contact the CBSA at 1-800-461-9999.

If required, the business may enrol in sub-programs on CBSA Program Accounts.

If required, the business may enrol in a new CBSA Program Account.

Please refer to the [Catalogue of user guides for the CARM Client Portal](#) for more information about using the CARM Client portal.