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 <u>First time set up – Register my business scenarios</u> 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 <u>First time set up – Register my business</u> <u>scenarios</u> 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.

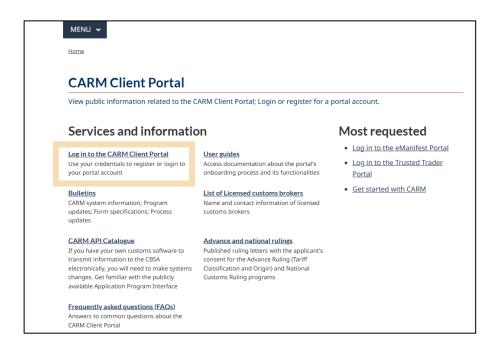
It is important to note that the user who completes the registration of the business on the CARM Client Portal will automatically become the associated Business Account Manager (BAM), or the person with ultimate account authority. A business account can only be registered once, but its Business Account 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 <u>Log in to the CARM Client Portal</u> and complete the steps to access the system and complete your profile.



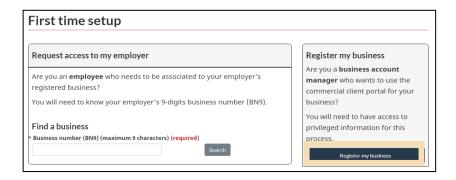
Note:

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

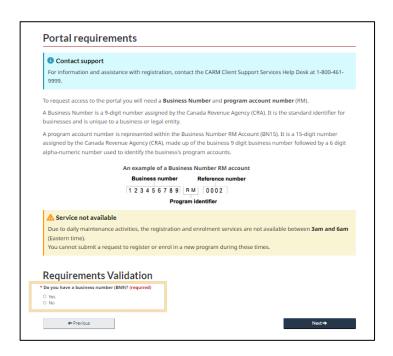
Click here to access the CARM Client Portal

For more information, please refer to the user guide Onboarding to the CARM Client Portal.

2. Select Register my business.



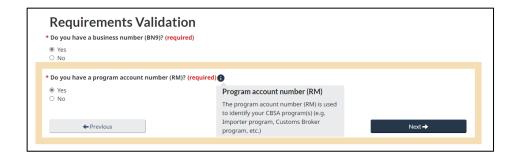
3. To register your business, confirm that you have a **business number (BN9)** by selecting **Yes**. Your business number (BN15) includes the 9 digit business number, 2 letters (RM) as the program identifier and the 4 digit reference number.



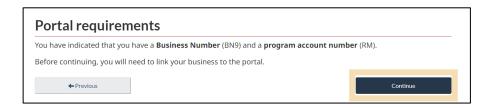
Note:

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 <u>First time set up - Register my business</u> user guide, Scenario 4.

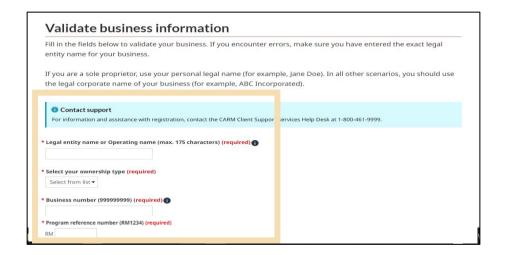
4. The existing RM must be active, ensure you select **Yes** to having an RM, otherwise an error message will be triggered. Click **Next.**



5. Click **Continue**.



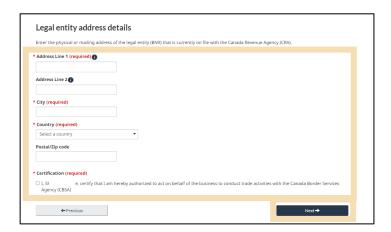
6. Fill in your business information.



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.

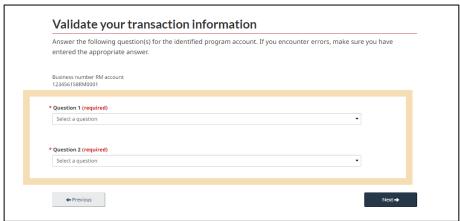
7. Fill in the **Legal entity address details** and click **Next** to continue.



- 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.)



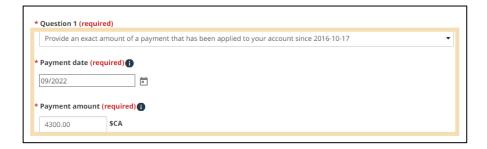
9. Question: SOA balance from last 6 years.

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



10. Question: Payment amount and date.

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



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.



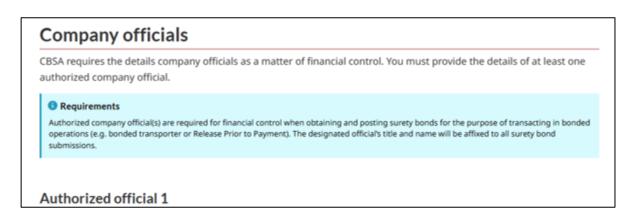
Important note:

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.

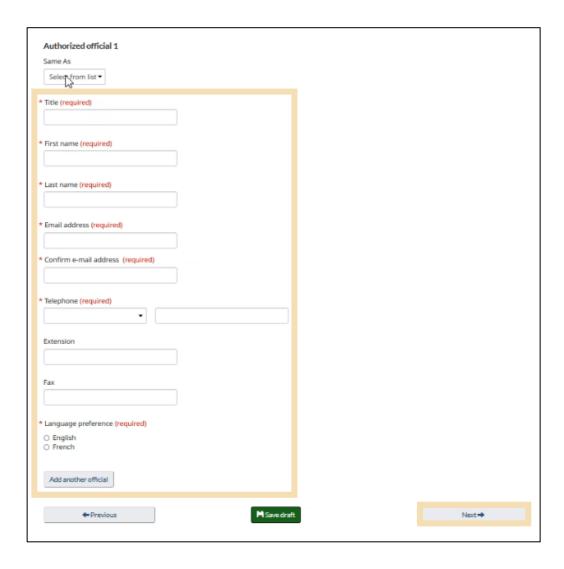
12. Click Next to continue.



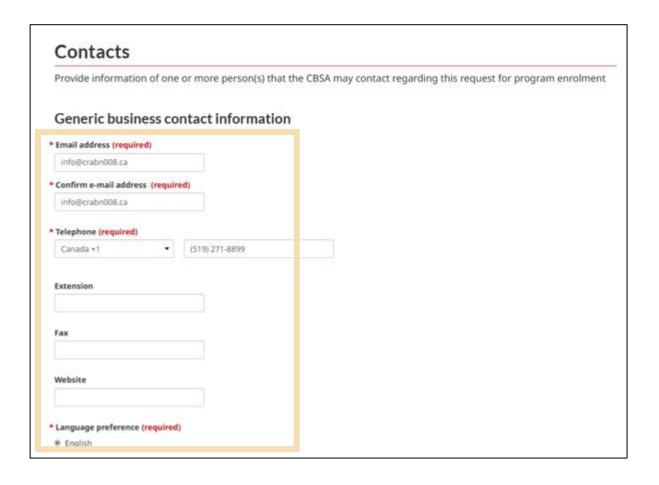
13. Fill in the required business information and the **Authorized official 1** who will have financial control over this business number. It is possible to add another official.



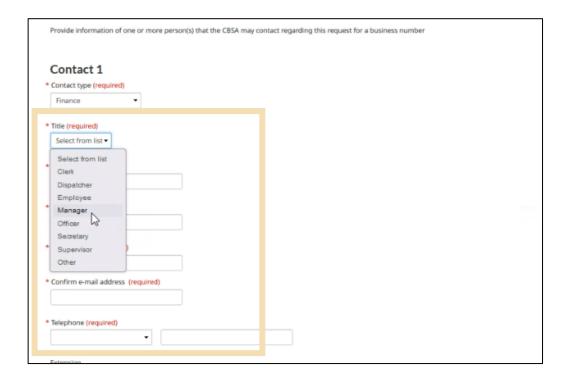
14. Once completed, click on Next.



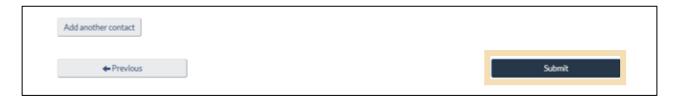
15. Fill in the information required for step Generic business contact information.



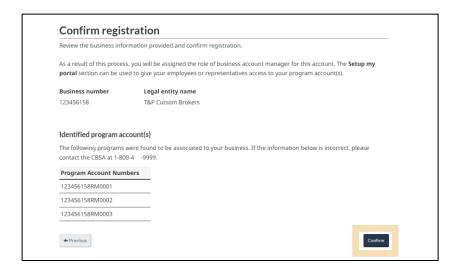
16. Fill in the information required for **Contact 1**.



17. Once completed, click on Submit.



18. Review your business information and click 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 <u>Catalogue of user guides for the CARM Client Portal</u> for more information about using the CARM Client portal.