



Canada Border
Services Agency

Agence des services
frontaliers du Canada

CARM Client Portal

User Guide

Onboarding to the CARM Client Portal

Revision date: December 13, 2022

Purpose of this guide

This guide will explain the process for setting up individual and business accounts in the CARM Client Portal. This includes the detailed steps to be followed for accessing the CARM Client Portal either through a GCKey or Sign-In Partner, registering for multi-factor authentication and setting up user profile.

Important note:

It is important that users log in to the CARM Client Portal on a regular basis. For security purposes, user accounts created in the CARM Client Portal will be deactivated after 180 days of inactivity.

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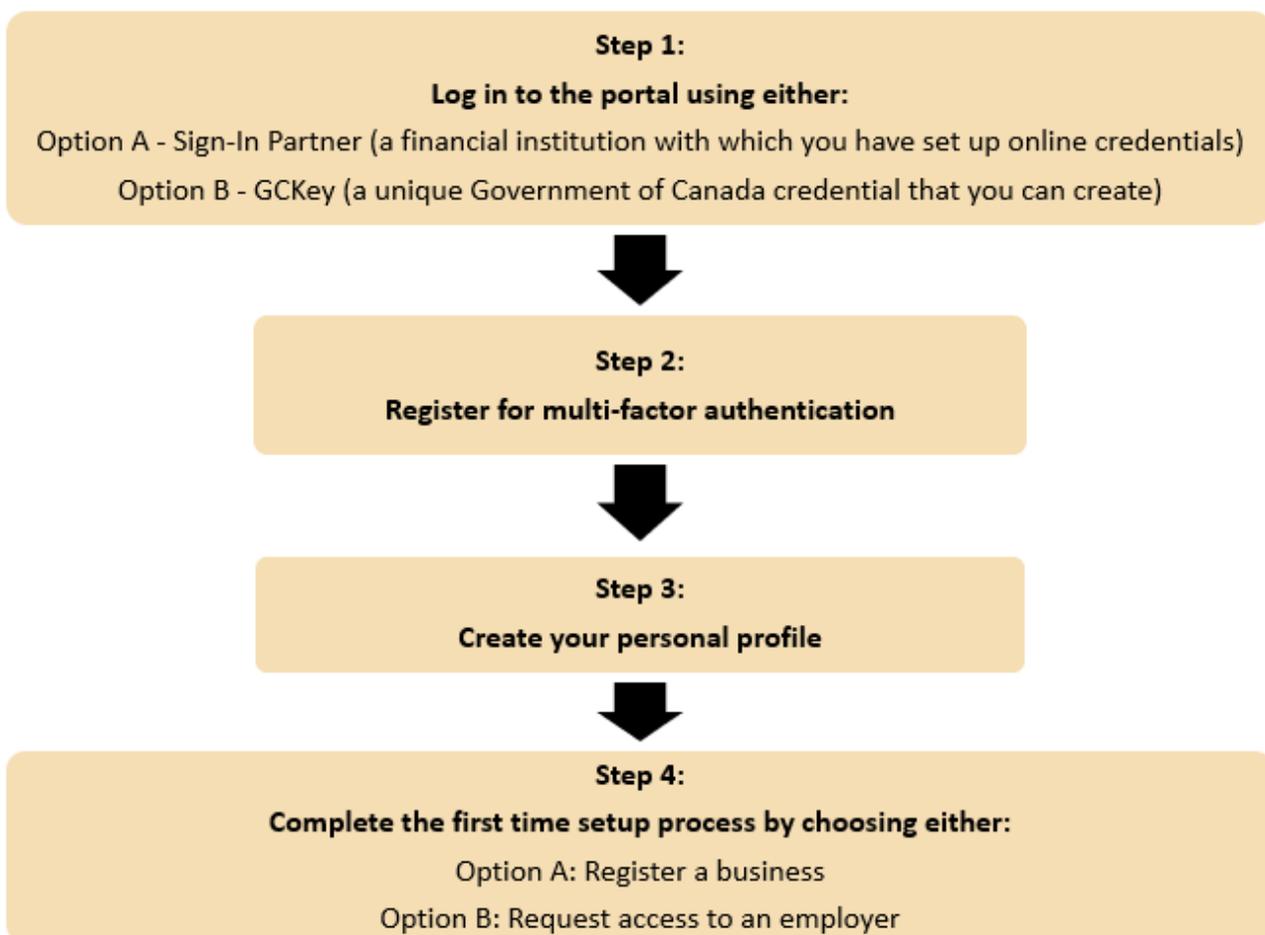
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1. Onboarding to the CARM Client Portal

1.1 Overview

The CARM Client Portal will serve as the primary hub for accounting and revenue management with the CBSA. Release 1 includes basic functionality in the portal that will allow users to easily set up their individual and businesses accounts, and begin to familiarize themselves with the portal in advance of the full implementation of CARM at Release 2.

To onboard to the CARM Client Portal, users will complete the following processes:



1.2 Accessing the CARM Client Portal

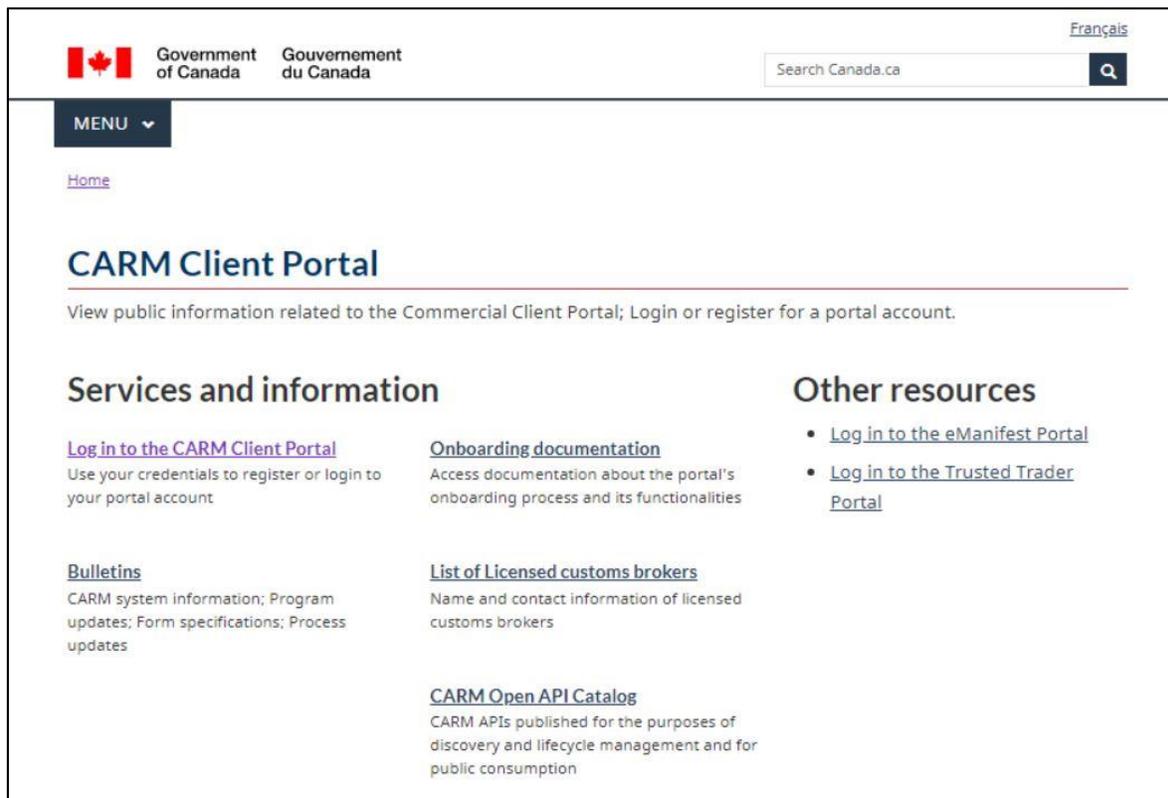
To access the CARM Client Portal, individuals must first open the CBSA webpage, the link to which can be found below:

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

Upon launching the CARM Client Portal, you will see the CARM Client Portal home page. This page has many resources available to you that do not require logging into your portal account.

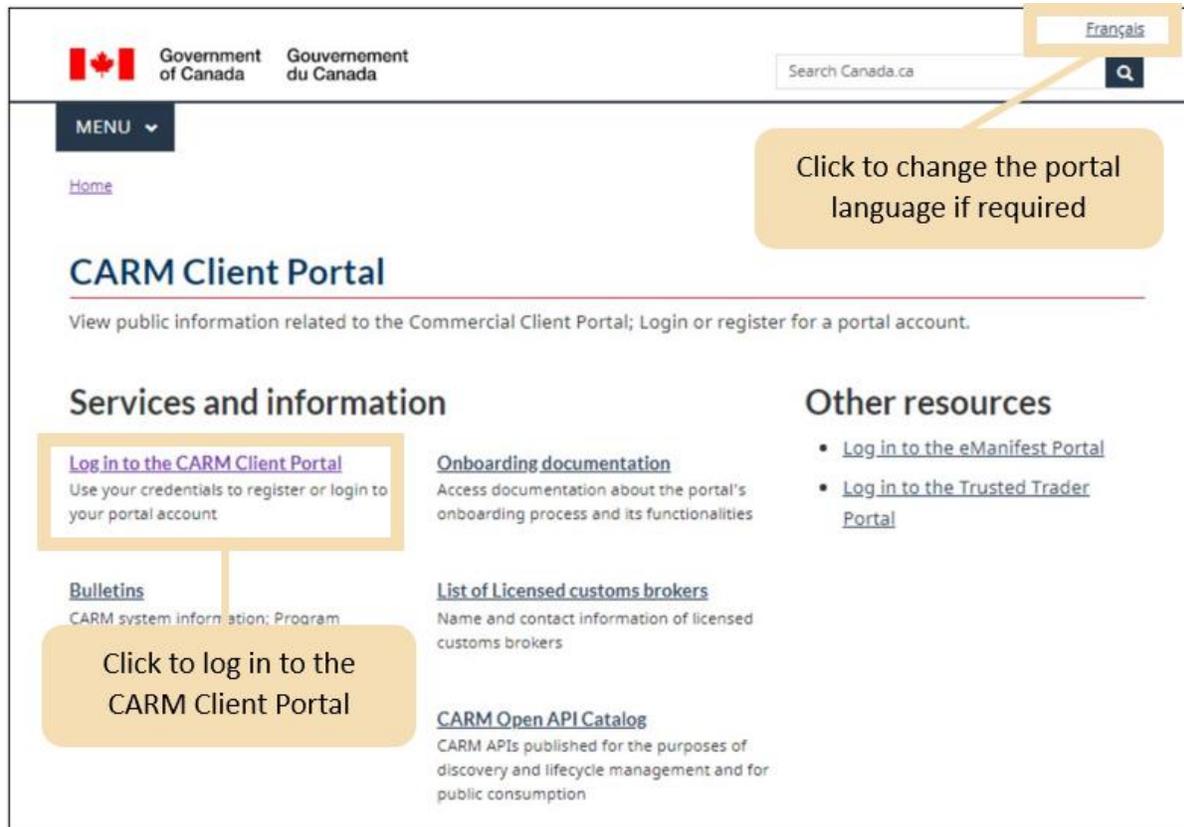
Important note:

Existing importers and customs brokers can onboard to the CARM Client Portal by following the steps in this user guide. Trade consultants may do so by contacting the CBSA at 1-800-461-9999.



The screenshot shows the CARM Client Portal home page. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". To the right of the header is a search bar with the text "Search Canada.ca" and a magnifying glass icon. Below the header is a "MENU" button with a dropdown arrow. The main content area features a "Home" link, the title "CARM Client Portal", and a subtitle "View public information related to the Commercial Client Portal; Login or register for a portal account." Below this, there are two columns of content. The left column is titled "Services and information" and contains links for "Log in to the CARM Client Portal" (with a description: "Use your credentials to register or login to your portal account"), "Bulletins" (with a description: "CARM system information; Program updates; Form specifications; Process updates"), "Onboarding documentation" (with a description: "Access documentation about the portal's onboarding process and its functionalities"), "List of Licensed customs brokers" (with a description: "Name and contact information of licensed customs brokers"), and "CARM Open API Catalog" (with a description: "CARM APIs published for the purposes of discovery and lifecycle management and for public consumption"). The right column is titled "Other resources" and contains a list of links: "Log in to the eManifest Portal" and "Log in to the Trusted Trader Portal".

In order to create and/or access your portal account, go to the **Log in to the CARM Client Portal** link under **Services and Information**.



Note that in order to access all available features of the CARM Client Portal, individuals and businesses must first go through the initial setup process. Once you have selected the **Log in to the CARM Client Portal** link, you will be taken to the CARM Client Portal access page where you will be prompted to log in using one of the following options:

- Continue to Sign-In Partner
- Continue to GCKey

Steps for logging in using both methods are detailed on the following pages.

Curious to learn more about the CARM Client Portal Login process? Reference the following walkthrough video:

- [How to Create Login Credentials in the CARM Client Portal](#)

The screenshot shows the top navigation bar of the Government of Canada website, including the logo and search bar. The breadcrumb trail indicates the user is on the 'CARM Client Portal' page. The main heading is 'Access the CARM Client Portal'. Under 'Option 1', there is a button 'Continue to Sign-in Partner' and a list of instructions for using a Sign-In Partner. A button 'View list of Sign-In Partners' is also present. Under 'Option 2', there is a button 'Continue to GCKey' and a list of instructions for using a GCKey user ID.

Government of Canada / Gouvernement du Canada

Search Canada.ca

Home > CARM Client Portal

Access the CARM Client Portal

Option 1

[Continue to Sign-in Partner](#)

- Use the same sign-in information you use for other online services (for example, online banking).
- If you have a joint bank account, only one of the two people can register for CCP with the shared account. The second person must use a different Sign-In Partner account or create a GCKey account.
- None of your information (for example, financial, banking) will be shared with CBSA. Your Sign-In Partner will not know which government service you are using.
- You will temporarily leave the CBSA site to use your Sign-In Partner.

[View list of Sign-In Partners](#)

Option 2

[Continue to GCKey](#)

- Sign-in with a GCKey user ID and password if you do not use one of the Sign-In Partners.
- Register for a GCKey user ID and password if you do not have one.
- Your GCKey user ID can be used to access other Government of Canada departments and agencies. GCKey user IDs created on other federal government sites can be used on CBSA.
- If you have forgotten an existing GCKey user ID you will need to create a new one.

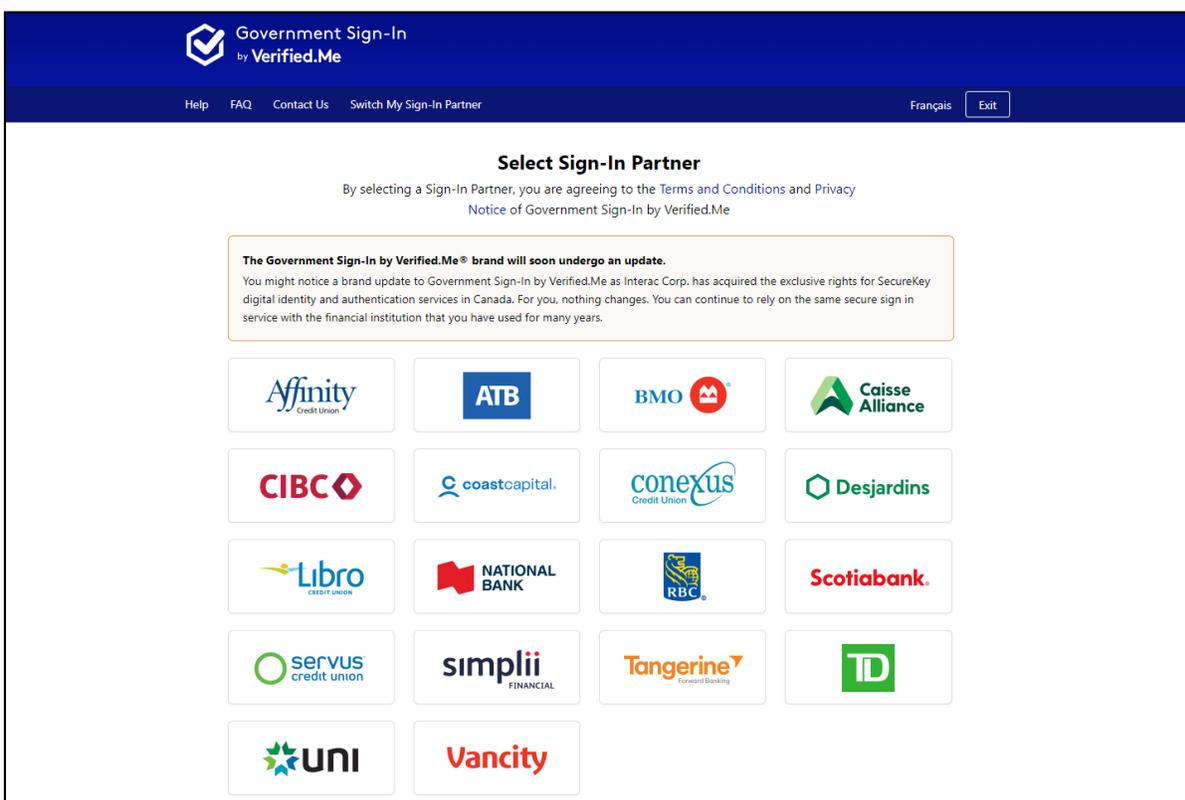
1.3 Logging in with a Sign-In Partner

The **Sign-In Partner** option allows users to log in through the web portal of their financial service provider. Sign-In Partners are financial institutions and banks that have partnered with SecureKey Technologies to enable their customers to use their online credentials to log in to other secure sites.

All individuals and businesses who use this option must have a pre-existing account with the selected partner.

After selecting your Sign-In Partner from the list of available institutions, you will be directed to the Partner's sign-in page to log in using your credentials.

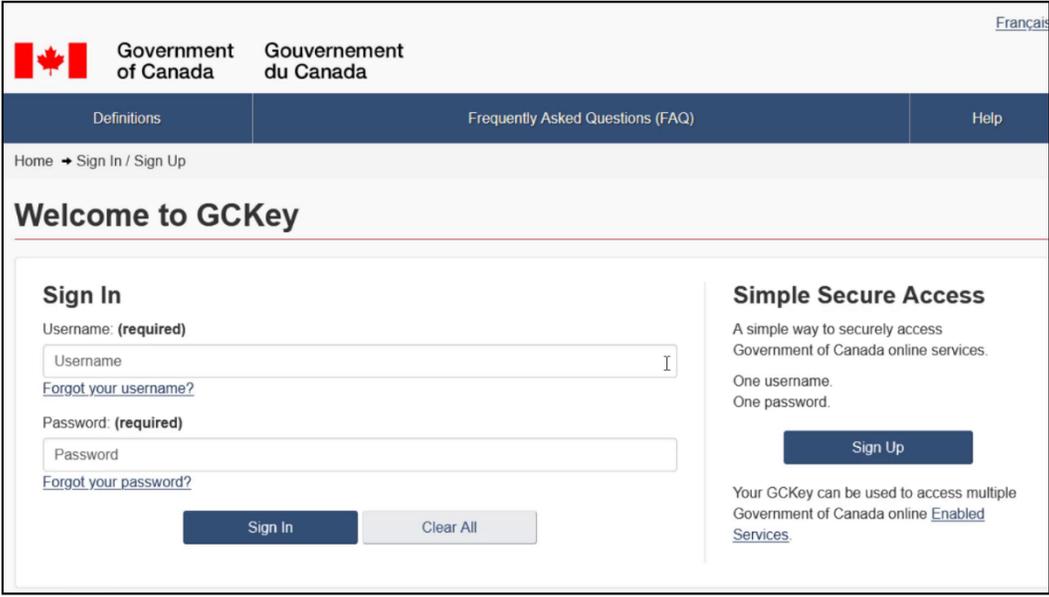
The full list of available Sign-In Partners can be found by clicking the following link: [List of Sign-In Partners](#)



1.4 Logging in using an existing GCKey

A GCKey is a unique credential that protects your communications with online Government programs and services.

On this page, you will have the option to sign in using an existing GCKey, or you may create a new one.



The screenshot shows the GCKey sign-in page. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". Below the header, there are navigation links for "Definitions", "Frequently Asked Questions (FAQ)", and "Help". The main content area is titled "Welcome to GCKey" and contains a "Sign In" section with fields for "Username" and "Password". There are also links for "Forgot your username?" and "Forgot your password?". To the right of the sign-in section, there is a "Simple Secure Access" section with a "Sign Up" button and a note that the GCKey can be used to access multiple Government of Canada online services.

Important note:

While you may use existing GCKey credentials from certain other Government of Canada portals, note that some exceptions (such as MyCRA) may apply. If this is the case, you will need to create a unique GCKey to access the CARM Client Portal.

1.5 Creating a new GCKey

To create a new GCKey, follow the steps below:

1. Click on the **Sign Up** button.

Home → Sign In / Sign Up

Welcome to GCKey

Sign In

Username: **(required)**

Password: **(required)**

[Forgot your password?](#)

Simple Secure Access

A simple way to securely access Government of Canada online services.

One username.
One password.

Your GCKey can be used to access multiple Government of Canada online [Enabled Services](#).

2. If you agree with the **Terms and Conditions of Use** after reading, click the **I accept** button to continue.

Definitions Frequently Asked Questions (FAQ)

Home → GCKey Sign Up Step 1 of 4

Terms and Conditions Username Password

Terms and Conditions of Use

In return for the Government of Canada providing you with a GCKey, you agree to abide by the following Terms and Conditions of Use:

- You understand and accept that you are at all times responsible for your GCKey Username, Password and Recovery Questions, Answers and Hints. If you suspect that others have obtained them, you are responsible for revoking your GCKey and obtaining a new one with a new Username and Password.
- You understand and accept that the Government of Canada can revoke your GCKey for security or administrative reasons.
- You understand and accept that the Government of Canada disclaims all liability (except in cases of gross negligence or willful misconduct) in relation to the use of, delivery of or reliance upon the GCKey service. More details can be found in our [Disclaimers](#).

By selecting the **I accept** button, you are accepting the GCKey Terms and Conditions as stated above. You can choose to not sign up for a GCKey by selecting **I decline** to end this process.

3. Create your username as per the specifications provided in the **Username Checklist** and click the **Continue** button.

The screenshot shows the 'Create Your Username' step in a registration process. At the top, a progress bar includes 'Terms and Conditions', 'Username' (highlighted), 'Password', 'Questions and Answers', and 'Email'. The main heading is 'Create Your Username' with a 'Back' link. Below the heading, instructions state: 'Your username must contain at least eight characters and be unique to you. When creating your Username, we recommend that you:'. A list of recommendations includes: 'make your Username easy for you to remember and hard for others to guess;', 'avoid using personal information such as your name, Social Insurance Number (SIN), mailing address or email address;', and 'always keep your Username secure and do not share it with anyone.' A text input field is labeled 'Create Your Username: (required)'. Below it, a message says 'Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.' Three buttons are present: 'Continue' (dark blue), 'Clear All' (light grey), and 'Cancel' (light grey). On the right, there are two panels: 'Privacy' with a link to 'Privacy Notice' and 'Username Checklist' with the following specifications: 'Minimum 8 characters', 'May contain: capital letters (A - Z); lower-case letters (a - z); French characters (ùúüÿàâæçèéëíîóœ); digits (0 - 9); and special characters: \$ % ^ ? : { } ~ ' ? / | & * _ - . ' () [] !'.

4. Create your password as per the specifications provided in the **Password Checklist** and click the **Continue** button.

The screenshot shows the 'Create Your Password' step in a registration process. At the top, a progress bar includes 'Terms and Conditions', 'Username', 'Password' (highlighted), 'Questions and Answers', and 'Email'. The main heading is 'Create Your Password' with a 'Back' link. Below the heading, instructions state: 'Your Password must be at least 12 characters and must not contain your username.' A text input field is labeled 'Create Your Password: (required)' and contains 12 dots. Below it, a green bar indicates 'Strength: Strong'. A second text input field is labeled 'Confirm Your Password: (required)' and also contains 12 dots. A message says 'Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.' Three buttons are present: 'Continue' (dark blue), 'Clear All' (light grey), and 'Cancel' (light grey). On the right, there are two panels: 'Privacy' with a link to 'Privacy Notice' and 'Password Checklist' with the following specifications: 'Minimum 12 characters', 'Does not contain your Username', and 'Passwords match'. At the bottom left, it says 'Date modified: 2020-09-01'. At the bottom, there is a footer with links for 'About', 'Transparency', 'News', and 'Contact Us'.

Important note:

Throughout each step of this process, some indications will be provided at the right side of the screen (e.g., username and password checklists, recovery questions and answers guidance, etc.). It is important you pay attention to these.

5. Create your recovery questions and click the **Continue** button.

The screenshot shows a web form titled "Create Your Recovery Questions, Answers and Hints". The form is divided into two main sections. The left section contains several input fields: "Select a Recovery Question: (required)" with a dropdown menu, "My Recovery Answer: (required)" with a text box, "My Memorable Person: (required)" with a text box, "My Memorable Person Hint:" with a text box, "My Memorable Date (YYYY-MM-DD): (required)" with a text box, and "My Memorable Date Hint:" with a text box. At the bottom of this section are three buttons: "Continue" (highlighted with a yellow border), "Clear All", and "Cancel". The right section is titled "Privacy" and contains a paragraph of text: "Please keep your Recovery Question, Answers and Hints secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#)". Below this is an information icon and another paragraph: "Your answers must contain at least three characters and contain no special characters (for example: %, #, @). Your hints must contain at least three characters and may contain letters, numbers and the following punctuation characters: apostrophe ('), comma (,), dash (-), period (.) and question mark (?)." The form also includes a footer instruction: "Please select **Continue** to proceed or click **Cancel** to end the Sign Up process."

6. Click the **Continue** button on the confirmation page to finalize the process.

The screenshot shows a confirmation page titled "GCKey Sign Up Complete". At the top left, there is a breadcrumb link: "Home → GCKey Sign Up Complete". The main heading is "GCKey Sign Up Complete". Below the heading, the text reads: "You have successfully created your GCKey. Your Username is: CDCTest1. Please select **Continue** to leave the GCKey service and return to the Government of Canada online service." At the bottom center, there is a "Continue" button highlighted with a yellow border. On the right side, there is a "Privacy" section with the text: "Please keep your Username secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#)."

1.6 Registering for Multi-Factor Authentication

Once you have signed in using either a Sign-In Partner or GCKey, you will be taken to the multi-factor authentication registration page.

To use the CARM Client Portal, you will automatically be prompted to register for multi-factor authentication if you have not previously completed the registration process.

1. On the multi-factor authentication registration page, enter your email address in the fields provided:

MFA Registration

Secure Your Account

CBSA is committed to protecting your personal information. To improve privacy and security, you have to register for multi-factor authentication. This mandatory new step is an enhanced security measure for your Government of Canada (GC) online account.

To register, you have to use a valid email address. A security code will be sent to the email address you provided.

Email Address:

Re-type Email Address:

Check this box to indicate that you have read and agree to the following:
[Multi-Factor Authentication Privacy and Consent Statement](#)

Continue **Clear All**

Important note:

Multi-factor authentication for the CARM Client Portal only uses email at this time. Multi-factor authentication passcodes cannot be sent by text message.

2. Check the box to indicate that you have read and that you agree to the multi-factor authentication privacy and consent statement. It is recommended that you click the link below it to read it first. Then, click **Continue**.

Check this box to indicate that you have read and agree to the following:

▼ [Multi-Factor Authentication Privacy and Consent Statement](#)

CBSA is committed to protecting your personal information. To improve privacy and security, you have to register for a multi-factor authentication.

This mandatory new step is an enhanced security measure against an unauthorized access to your business account associated with the commercial portal(s).

You have to provide a valid email address, which will be shared with a third party (2Keys), so they can send you an email with a security code for the second factor authentication.

If you:

- have read the above statement completely,
- understand that Canada Border Services Agency will protect your personal information in accordance with the Privacy Act,
- understand that your personal email address will only be used for sending you the security code by 2Keys for in-transit data transmission,
- your email address will not be permanently stored by 2Keys once the security code is sent, rather your email address will be deleted permanently,
- allow Canada Border Services Agency to disclose your personal email information to 2Keys, and
- you would like to proceed with the MFA registration,

please check the box above.

Note: As a consequence of withholding the consent, you will not be able to access the commercial portal(s).

3. Check your email for a one-time passcode. The passcode is a **six-digit number**.

Verify Your Login

Your one-time passcode to log in to your Government of Canada service is:

209449

This email was sent to tcp@tcp.tcp

You received this email because you signed up for a Government of Canada login account.

For more information or if you received this email in error please visit:
<https://www.cbsa-asfc.gc.ca/eservices/multifactor-help-aide-multifacteur-eng.html>

4. Enter this passcode in the **Security Code** field. Then, click the **Submit** button.

Important note:

If you receive an email with a passcode and you did not try to log into the CARM Client Portal, it might mean that your GCKey or Sign-In Partner password has been compromised. You should investigate and if necessary, change your password.

Important note:

The multi-factor authentication passcode changes each time you try to log in to the CARM Client Portal, and each time you press the **Resend** button. Always use the most recent multi-factor authentication passcode that was sent to you.

Important note:

Some e-mail domains, especially company domain names, are taking longer to receive the email with the one-time passcode. This delay is causing the passcode to be received outside of the validity period which renders it invalid.

If you are receiving your passcode outside of the range of validity and then an expired passcode reject thereafter, please have your company IT department review this information and have the following email address be recognized as trusted if possible:

CBSA-ASFC@auth.canada.ca

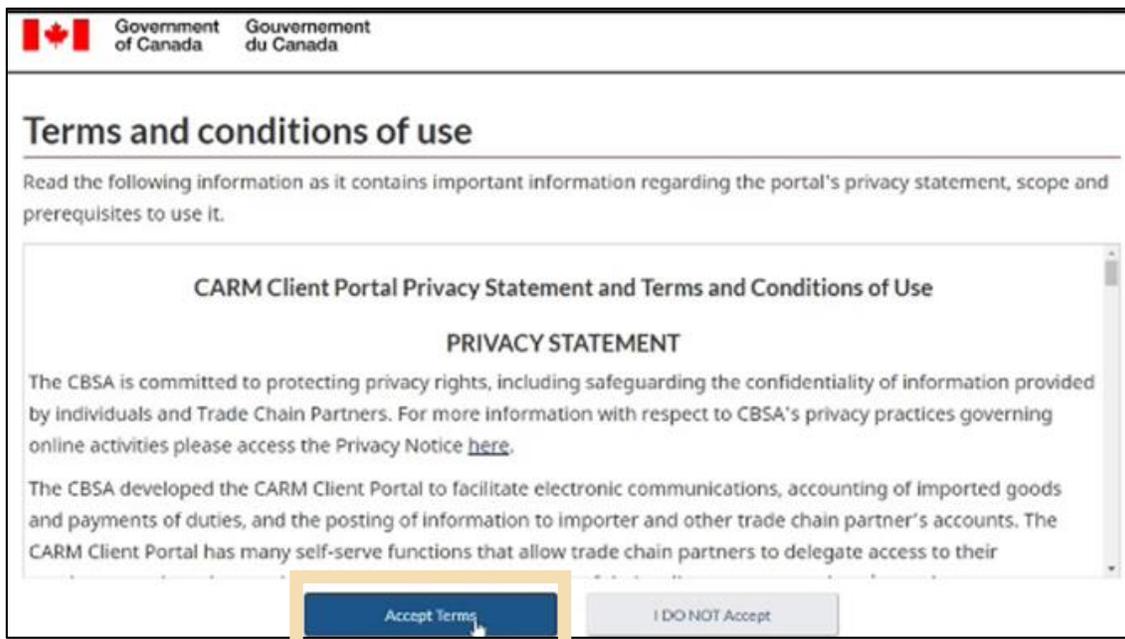
Otherwise, update the email address that you have registered with to a different email address (for example an email address not linked to the company).

5. The registration screen will inform you of successful registration for multi-factor authentication.



If you click **Change MFA email**, you will need to repeat this process. If you click **Continue to CARM Client Portal**, you will be taken to the **Terms and conditions of use** page.

6. Click the **Accept Terms** button to continue.



Important note:

If you encounter challenges using the multi-factor authentication, review the [Multi-factor Authentication Help for Secure Online Services](#) page for more information.

If, after reviewing the information, you are still having issues, contact [CARM Client Support Helpdesk](#) using the link on the CARM webpage shown below.

The screenshot shows the top portion of a webpage titled "CARM: CBSA Assessment and Revenue Management project". The text describes the project as a multi-year initiative by the Canada Border Services Agency (CBSA) to modernize and streamline the import process. A "Services" sidebar lists links for "Client Portal", "How the trade community can prepare", and "Client support" (which is highlighted with a yellow box). A "Benefits" section lists three points: simplifying the import process, providing a modern interface, and reducing costs.

CARM: CBSA Assessment and Revenue Management project

From the [Canada Border Services Agency](#)

The Canada Border Services Agency (CBSA) Assessment and Revenue Management (CARM) project is a multi-year initiative that will transform the collection of duties and taxes for goods imported into Canada. Through CARM, the CBSA will modernize and streamline the process of importing commercial goods.

Services

- [Client Portal](#)
- [How the trade community can prepare](#)
- [Client support](#)
- [CARM website](#)

Benefits

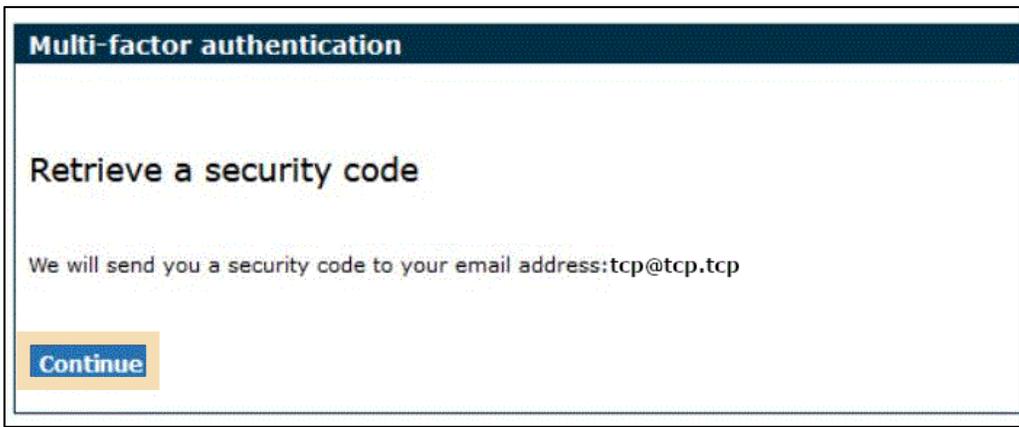
Once fully implemented, CARM will:

- simplify the overall importing process
- provide a modern interface for importing into Canada
- give importers self-service access to their information
- reduce the cost of importing into Canada

1.7 Logging in with Multi-Factor Authentication

Once multi-factor authentication has been set up, when you log in to the CARM Client Portal (using either the Sign-In Partner or GCKey option), you will be taken to the Multi-factor authentication page. It will inform you that a security code has been sent to your email address.

1. On the Multi-factor authentication page, click the **Continue** button to send the security code to your email address.



The screenshot shows a web page titled "Multi-factor authentication" in a dark blue header. Below the header, the main heading is "Retrieve a security code". Underneath, it says "We will send you a security code to your email address: tcp@tcp.tcp". At the bottom left, there is a blue button with the word "Continue" in white text.

2. Check your email for the one-time passcode, which is a **six-digit number**.



The screenshot shows an email titled "Verify Your Login". The main heading is "Verify Your Login". Below it, it says "Your one-time passcode to log in to your Government of Canada service is:". The passcode "974519" is displayed in a large blue font inside a yellow-bordered box. Below the passcode, it says "This email was sent to tcp@tcp.tcp". Further down, it says "You received this email because you signed up for a Government of Canada login account." At the bottom, it says "For more information or if you received this email in error please visit:" followed by the URL <https://www.cbsa-asfc.gc.ca/eservices/multifactor-help-aide-multifacteur-eng.html>.

3. Enter the passcode received via email in the **Security Code** field. Click **Submit** to continue.

Multi-factor authentication

Enter One-Time Passcode

We have sent you a security code to your email address:tcp@tcp.tcp

Security Code
974519

Submit

If you did not receive the one-time passcode, you may request it again. The CBSA will resend the passcode to the email address you previously provided.

Resend

Important note:

The multi-factor authentication passcode changes each time you try to log in to the CARM Client Portal, and each time you press the Resend button. Always use the most recent multi-factor authentication passcode that was sent to you.

4. If you entered the correct passcode, the message Multi-factor authentication successful will be displayed.

Multi-factor authentication

✔ Multi-factor authentication successful.

Change MFA email

Continue to CARM Client Portal

If you click **Continue to the CARM Client Portal**, you will first be taken to a page that shows the Terms and conditions of use page. Click **Accept terms** to continue.



The screenshot shows the 'Terms and conditions of use' page for the CARM Client Portal. At the top left, there is the Government of Canada logo and the text 'Government of Canada' and 'Gouvernement du Canada'. The main heading is 'Terms and conditions of use'. Below this, a paragraph reads: 'Read the following information as it contains important information regarding the portal's privacy statement, scope and prerequisites to use it.' A large white box contains the title 'CARM Client Portal Privacy Statement and Terms and Conditions of Use' and a sub-heading 'PRIVACY STATEMENT'. The text in the box states: 'The CBSA is committed to protecting privacy rights, including safeguarding the confidentiality of information provided by individuals and Trade Chain Partners. For more information with respect to CBSA's privacy practices governing online activities please access the Privacy Notice [here](#).' and 'The CBSA developed the CARM Client Portal to facilitate electronic communications, accounting of imported goods and payments of duties, and the posting of information to importer and other trade chain partner's accounts. The CARM Client Portal has many self-serve functions that allow trade chain partners to delegate access to their'. At the bottom of the box, there are two buttons: 'Accept Terms' (highlighted with a yellow border) and 'I DO NOT Accept'.

1.8 Creating your personal profile

When you first log in to the CARM Client Portal (using either the Sign-In Partner or GCKey option), you will be prompted to create your personal profile. Your personal profile contains your contact details, as well as settings and preferences.

Create your personal profile

Your contact details will be used to communicate important updates.

User information

* First Name (required)

* Last Name (required)

Contact Information

* Telephone number(including area code) (required)

Extension

* Email address (required)

* Confirm e-mail address (required)

Settings and Preferences

* Receive e-mails about notifications (required)

Subscribed - I want to receive e-mails about my notifications.
 Unsubscribed - I do not want to receive e-mails about my notifications.

Note: You will still receive e-mails about urgent notifications, even if you are unsubscribed

* Preferred language (required)

English
 French

To learn more about subscribing to email notifications, see [Section – Setup of notifications](#).

Note that you will be able to update this information in your Account Settings at a later time if required.

Once you have added your personal information and have identified your preferences for notifications and preferred language, you will be prompted to create security questions and answers for subsequent identity verification attempts.

Security questions

Your selected questions and answers will be used for identity verification when calling the CBSA phone support in regards to activities on this account.

* Question 1 (required)

* Answer 1 (required)

* Question 2 (required)

* Answer 2 (required)

* Question 3 (required)

* Answer 3 (required)

[Create Profile](#)

Version 0.1.55

1.9 Linking your individual account to a business account

After your profile creation, you will be greeted with the **First time setup** page, from which two options will be available: **Request access to my employer**, or **Register my business**.

The screenshot shows the 'First time setup' page with two main options highlighted in yellow boxes:

- Request access to my employer**: This option asks if the user is an employee who needs to be associated with their employer's business. It requires the user to know the employer's 9-digit business number (BN9). Below this, there is a 'Find a business' section with a search bar containing the text 'Business number (BN9) (maximum 9 characters) (required)' and a 'Search' button.
- Register my business**: This option asks if the user is a business account manager who wants to use the commercial client portal. It requires the user to have access to privileged information. A 'Register my business' button is visible at the bottom of this section.

1. Request access to an employer

This option is intended for employees who wish to request access to a business account that is already registered on the portal. Employees will be asked to enter the **Business Number (or BN9)**, and to provide a **reason for requesting access**.

The screenshot shows the 'First time setup' page with the 'Request access to my employer' option selected and highlighted in yellow boxes:

- Request access to my employer**: This option asks if the user is an employee who needs to be associated with their employer's business. It requires the user to know the employer's 9-digit business number (BN9). Below this, there is a 'Find a business' section with a search bar containing the text 'Business number (BN9) (maximum 9 characters) (required)' and a 'Search' button. The search bar contains the value '100001254'. Below the search bar, there is a 'Found match' section with the text 'Business operating/trade name: ImporterCompany1755'. Below this, there is a 'Specify why you need access' section with a text area containing the text 'Comments (maximum 256 characters) (required)' and a 'Request Access' button.
- Register my business**: This option is visible on the right side of the page, asking if the user is a business account manager who wants to use the CARM Client Portal. It requires the user to have access to privileged information. A 'Register my business' button is visible at the bottom of this section.

2. Register 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.

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.

To learn more about the role of the Business Account Manager as well as the Delegation of Authority process, review the following guide:

- [User guide – Delegation of Authority](#)

Upon clicking **Register my business**, you will be greeted with the following screen that details the business linking requirements:

The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text 'Government of Canada' and 'Gouvernement du Canada'. To the right of the header is a link for 'Français'. Below the header is a dark blue bar with the text 'CARM Client Portal'. Underneath this bar is a light blue navigation bar with 'MENU' on the left and 'Personal profile | Logout' on the right. The main content area has a breadcrumb trail: 'Home > Setup my Portal'. The central focus is a white box with a yellow border titled 'Business linking requirements'. The text inside explains that users need a Business Number (BN) and an import-export program account (RM). It defines a Business Number as a 9-digit number assigned by the CRA and a 15-digit number (BN followed by a 6-digit alphanumeric RM) assigned by the CRA. An example of a Business Number RM account is shown: '1 2 3 4 5 6 7 8 9 | R M | 0 0 0 2'. Below the example, it is noted that 'R M' is the 'Program identifier'. The page concludes with instructions on how to register for both a business number and an import/export program account, and a 'Next' button for users who already have a Business Number RM account. Navigation buttons for 'Previous' and 'Next' are located at the bottom of the page.

You will then be required to enter the **business number** and **program reference number**, as shown below:

Enter your business number and program reference number

* Business number (999999999) (required) ⓘ

* Importer program reference number (RM1234) (required) ⓘ

RM

I, Liviu Family, certify that I am hereby authorized to act on behalf of the business to conduct trade activities with the Canada Border Services Agency (CBSA)

Important note:

If you do not have a Business Number (BN) or Program Reference Number (RM), you will be required to obtain these through the Canada Revenue Agency. Please visit the following link to do so:

[CRA Business Number Registration Page](#)

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.

Click **Next** to continue.

Validate your 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).

Business number
123456158

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

Legal entity address details

Enter the physical or mailing address of the legal entity (BN9) that is currently on file with the Canada Revenue Agency (CRA).

P.O. box/R.R.

* Address Line 1 (required)

Address Line 2

* Country (required)

Province/State

* City (required)

Postal/Zip Code

[← Previous](#) [Next →](#)

You will need to answer one or more questions about your account:

- The date (MM/YYYY) and the balance of a Statement of Account (SOA) within the last six years of the current date
- The date (MM/YYYY) and the exact amount of a 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 an 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.)

Validate your transaction information

Answer the following question(s) for the identified program account. If you encounter errors, make sure you have entered the appropriate answer.

Business number RM account
123456158RM0001

* Question 1 (required)
Select a question

* Question 2 (required)
Select a question

← Previous

Next →

Question: SOA balance from last 6 years

Enter the date of an 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

Question: Payment amount and date

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

Business number RM account
123456158RM0001

* 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

Question: Total duties and taxes for an import accounting transaction

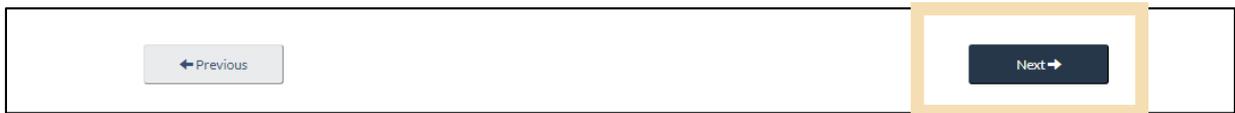
Enter the total amount of duties and taxes for an import accounting transaction accepted by the CBSA in the past six years.

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

Click **Next** to continue.



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.

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 Cutsom 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 1-800-491-9999.

| Program Account Numbers |
|-------------------------|
| 123456158RM0001 |
| 123456158RM0002 |
| 123456158RM0003 |

Navigation buttons: 'Previous' (left arrow) and 'Confirm' (right arrow). The 'Confirm' button is highlighted with a yellow border.

If any information shown on this screen is incorrect, contact the CBSA at 1-800-491-9999.

Curious to learn more about linking your Individual User Account with your Business Account? Click the link below to access the following step by step walkthrough video:

- [How to connect a user account to a business account](#)

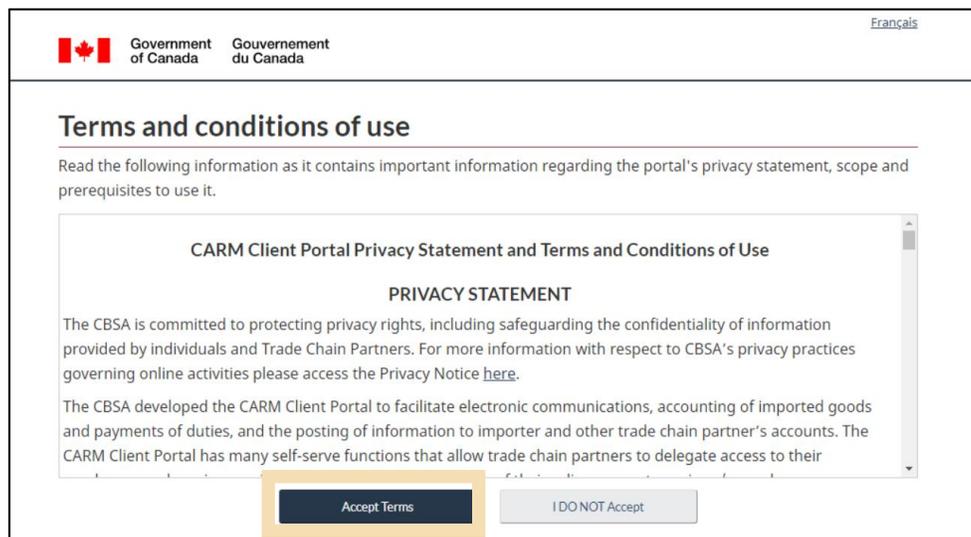
2. Basic navigation and features of the CARM Client Portal

2.1 Login navigation and features

For GCKey users, a successful log in page is displayed prior to reaching the CARM Client Portal home page. As a GCKey user you will be shown a standard welcome message that details your last sign in date, as well as a few links through which you can change your password, change your recovery questions, or revoke your GCKey.



Once you click the **Continue** button on the GCKey welcome page, you will be directed to the **Terms and Conditions of Use** screen of the CARM Client Portal.



These terms and conditions of use will be displayed every time you log in to the CARM Client Portal. It is important that you read and understand these fully prior to proceeding.

- Selecting the **Accept Terms** button will take you to the CARM Client Portal home page.
- Selecting the **I DO NOT Accept** button will cancel the process.

2.2 Functions available on the home page

The home page of the CARM Client Portal displays several quick access links that will allow you to easily navigate to various functionalities and features found on other pages in the CARM Client Portal.

The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". Below this is a dark blue bar with "CARM Client Portal" on the left and user information "Test Importer Name (RM0001)" and "ImporterCompany3084 (549132583)" on the right. A "MENU" dropdown is highlighted in the top left. To the right of the menu are links for "Upload a document", "Notifications", and "Logout". Below the header is a grid of six quick access links: "Setup my portal", "Accounts and profiles", "Financial information", "Payments", "Declarations", and "Rulings". At the bottom left, there is a "Recent Transactions" table with columns for "Transaction date", "Description", "Amount", and "Status". At the bottom right, there is a "Most requested" section with a list of links.

| Transaction date | Description | Amount | Status |
|------------------|-------------|--------------|-------------|
| 2021-03-09 | Card Lot | \$ -1,000.99 | Credit open |
| 2021-03-09 | Card Lot | \$ -3,000.99 | Credit open |
| 2021-03-09 | Card Lot | \$ -2,000.99 | Credit open |

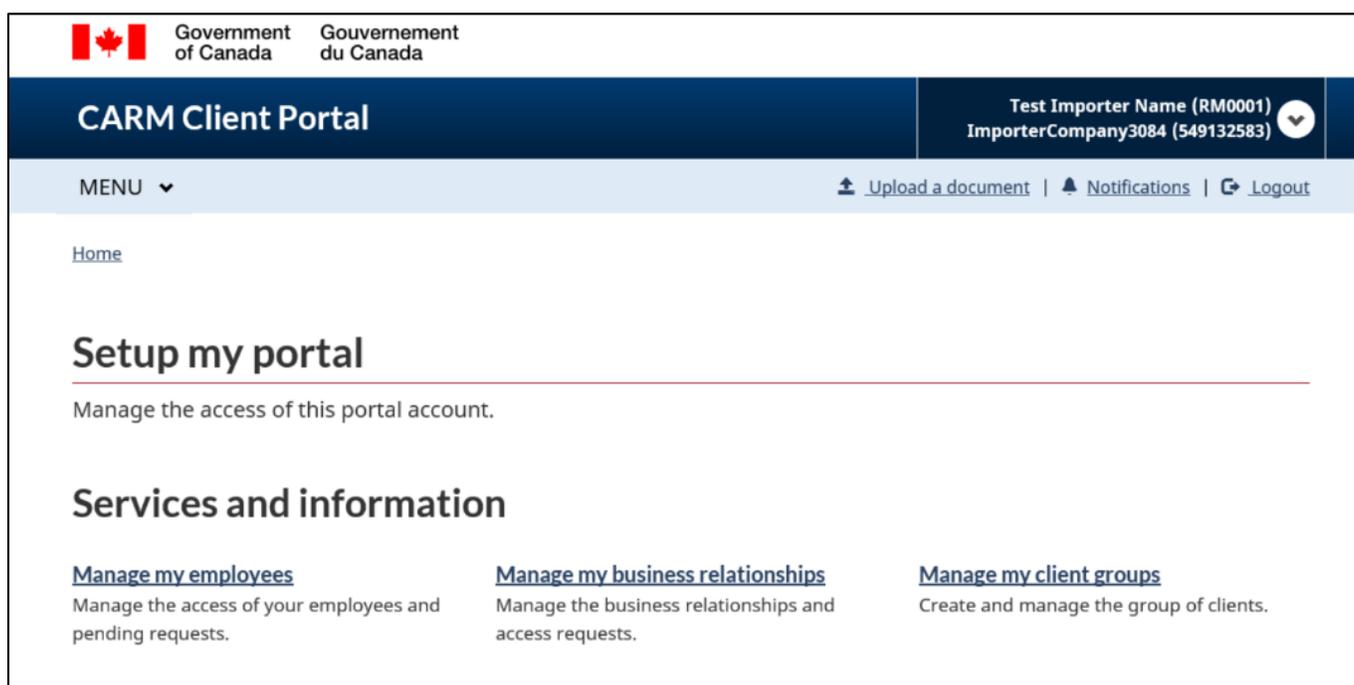
Alternatively, each of these pages can also be accessed by selecting them from the drop-down **MENU** located on the top left of the home page.

Additional information about these functions is outlined in further detail on the following pages.

1. Setup my portal

This link will direct you to the **Setup my portal** landing page. From this page, you will be able access the following options:

- **Manage employees** (Manage the access of your employees to select clients/accounts, and review pending access requests)
- **Manage business relationships** (Manage business relationships with clients and review access requests)
- **Manage client groups** (Create and manage groups of clients, as well as employee access to select groups)



The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". Below this is a dark blue navigation bar with "CARM Client Portal" on the left and user information "Test Importer Name (RM0001) ImporterCompany3084 (549132583)" on the right. A light blue bar below the navigation bar contains a "MENU" dropdown on the left and links for "Upload a document", "Notifications", and "Logout" on the right. The main content area has a "Home" link, followed by the heading "Setup my portal" and the sub-heading "Manage the access of this portal account." Below this is the heading "Services and information" and three columns of links: "Manage my employees" (Manage the access of your employees and pending requests), "Manage my business relationships" (Manage the business relationships and access requests), and "Manage my client groups" (Create and manage the group of clients).

To learn more about the management of employees and clients, please reference the following guide:

- [User guide – Delegation of Authority](#)

2. Accounts and profiles

This link will direct you to the **Accounts and profiles** landing page. From this page you will have the ability to view and/or make updates to your profiles through the following links:

- **Personal profile** (Contains information about your individual profile and portal preferences)
- **Business profile** (Contains relevant business information including address(es) and ownership)
- **List of program accounts** (Displays all program accounts associated with a business)
- **Program account profile** (Contains relevant program information, including RM number, program name, and addresses)

The screenshot shows the CARM Client Portal interface. At the top left is the Government of Canada logo. The top right has a language selector for 'Français'. The main header is dark blue with 'CARM Client Portal' on the left and user information '601880594RM0001-Importe... (RM0001) ImporterCompany5788 (601880594)' on the right. Below the header is a light blue navigation bar with 'MENU' on the left and 'Upload a document', 'Notifications', and 'Logout' on the right. The main content area has a 'Home' link and a section titled 'Accounts and profiles' with a subtitle 'View and make updates to your personal and business profiles'. Below this is a section titled 'Services and information' containing three links: 'Personal profile' (description: Maintain Individual profile information and portal preferences), 'Business profile' (description: View information about your business including: Business information, Address(es) and Ownership), and 'List of program accounts' (description: A list of all the program accounts associated to your business). A fourth link, 'Program account profile' (description: Program account profile includes your program RM number, program name and addresses), is located below the other three.

3. Financial information

This link will direct you to the **Financial information** landing page. From this page you will have the ability to view detailed information about your account history, statements, and invoices through the following links:

- **Transaction History** (Allows you to view a history of your transactions, review your account balance, and make payments)
- **Statement of account** (Statements that outline your transactions with the CBSA)
- **CBSA Invoices** (Invoices billed to you by the CBSA)

The screenshot shows the CARM Client Portal interface. At the top left is the Government of Canada logo. The main header is dark blue with 'CARM Client Portal' on the left and user information 'Test Importer Name (RM0001) ImporterCompany3084 (549132583)' on the right. Below the header is a light blue navigation bar with 'MENU' on the left and 'Upload a document', 'Notifications', and 'Logout' on the right. The main content area has a 'Home' link and a section titled 'Financial information' with a subtitle 'View a detailed account history, statements and invoices.' Below this is a section titled 'Services and information' with three columns: 'Transaction History' (with a description), 'Statement of account' (with a description), and 'CBSA Invoices' (with a description).

4. Payments

This link will direct you to the **Payments** landing page. From this page you will have the ability to view and make payments and payment arrangements through the following links:

- **Apply credits as payment** (Allocate your account credit to specific transactions that you wish to clear immediately)
- **Pre-authorized debit** (Allows you to set up pre-authorized deductions from your bank account on a monthly basis)

The screenshot shows the CARM Client Portal interface. At the top left, there is the Government of Canada logo and text in both English and French. The main header is dark blue with 'CARM Client Portal' on the left and user information '866323893RM0001-Importe... (RM0001) ImporterCompany7337 (866323893)' on the right. Below the header is a light blue navigation bar with 'MENU' on the left and 'Upload a document', 'Notifications', and 'Logout' on the right. The main content area has a 'Home' link, a 'Payments' section with a red underline, and a description: 'View and make payment and payment arrangements.' Below this is a 'Services and information' section with two columns: 'Apply credits as payment' and 'Pre-authorized debit', each with a brief description.

To learn more about financial information, processes, and payments, please reference the following guide:

- [User guide – Financial information, payment processing and tariff tools in the CARM Client Portal](#)

5. Declarations

This link will direct you to the **Declarations** landing page. From this page, you will have access to the **Duties and taxes calculator**. This tool can be used for estimating the duties and/or taxes that will be owed for goods before they are imported.

Government of Canada / Gouvernement du Canada

601880594RM0001-Importe... (RM0001)
ImporterCompany5788 (601880594)

MENU

Home > Declarations

Declarations

View and create declarations.

Services and information

[Duties and taxes calculator](#)
Tool to estimate duties and taxes.

Duties and taxes calculator

We offer this duties and taxes calculator as a self-help tool for your use. This tool does not replace professional advice. We cannot guarantee that this calculator will apply in your specific situation. For example, goods that are subject to various exceptions may require additional calculations beyond the scope of this tool to properly estimate for duties and taxes.

All results are given as examples only.

Customs | Summary

How to use this tool

1. Customs

Provide the customs details of a single commodity (see classification number) for your simulated importation. All fields are based on today's available tariffs.

* Classification number (required) ?

0000.00.00.00

Help me classify

Validate my input

Selecting the **Help me classify** button within the **Duties and taxes calculator** will direct you to an embedded classification tool. This tool will allow you to input known information about your goods/products in order to receive a tariff classification number for the goods.

Help me classify

Describe Your Product

The more information you provide about your product, the better.

For best results, describe your item first, then insert a comma and add additional attributes. For example: "Peas, Frozen"

You can also search by HS code, by entering the number (or part of the number) directly into the product description field. For example: "6201.11"

Finally, chemical substances can be searched both by proper name (e.g. 'Calcium Perchlorate') and by CAS number. To search by CAS number, type 'CAS' followed by the number in the product description field. For example: "CAS 13477-36-6"

For additional hints, please consult the Help files.

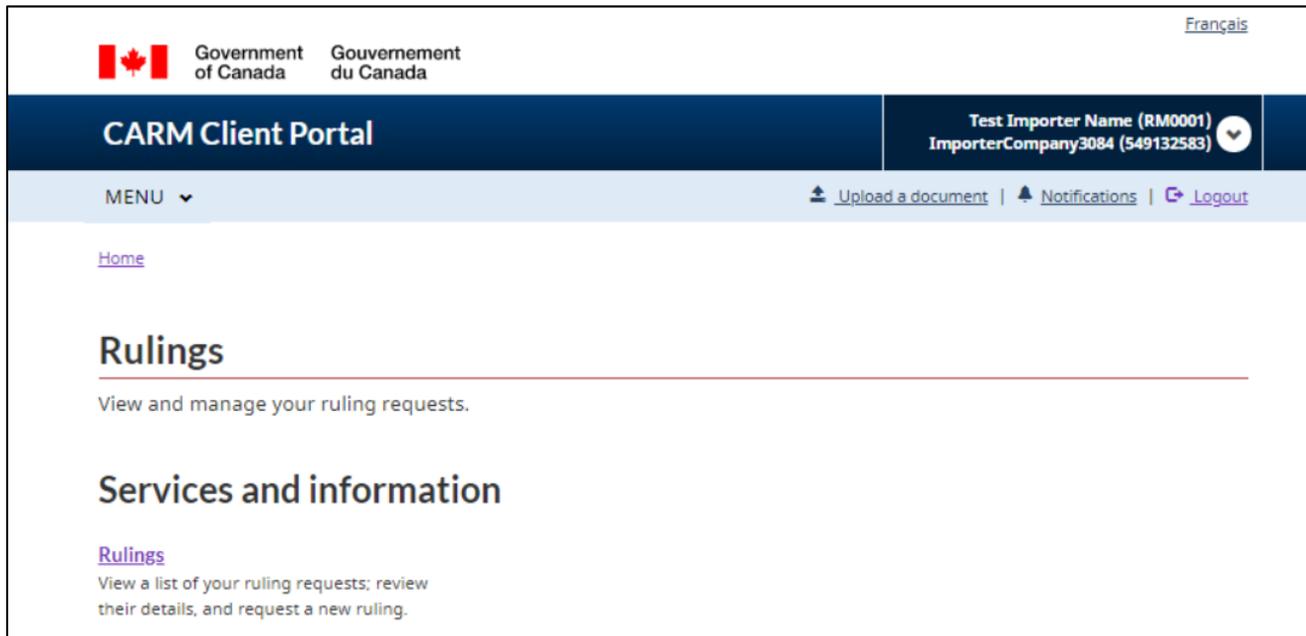
Additional information about the Duties and taxes calculator, and the classification tool can be found in both the below document and the below video:

- [User guide – Financial information, payment processing and tariff tools in the CARM Client Portal](#)
- [Video – How to use the Duties and taxes calculator in the CARM Client Portal](#)

6. Rulings

This link will direct you to the **Rulings** landing page. From this page, you will be able to view and manage all of your ruling requests within the portal:

- **Rulings** (Allows you to view a list of your ruling requests, review their details, and request new rulings)



Additional information about rulings processes can be found in the below document and the below videos:

- [User guide – Managing Rulings](#)
- [Video – Understanding Ruling statuses in the CARM Client Portal](#)
- [Video – How to submit a Ruling request in the CARM Client Portal](#)

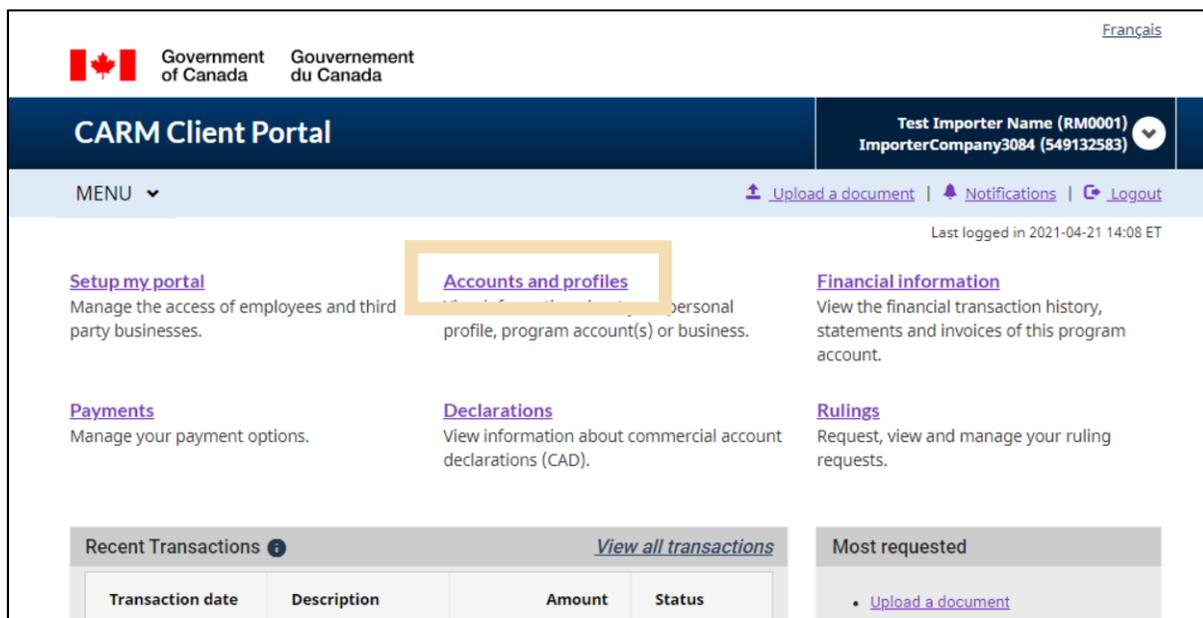
2.3 Setup of notifications

Setting up notifications within the CARM Client Portal is a useful way to ensure that you do not miss important communications from the CBSA.

Note that even if you do not subscribe to all notifications, you will still be notified if important communications that require timely action on your part are received.

To setup notifications, follow the below steps:

1. Select **Accounts and profiles** from the home page.



The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text "Government of Canada" and "Gouvernement du Canada". To the right, there is a language selector for "Français". Below the header, the main navigation bar includes "CARM Client Portal" and user information: "Test Importer Name (RM0001)" and "ImporterCompany3084 (549132583)". A dropdown arrow is next to the user information. Below the navigation bar, there is a "MENU" dropdown and links for "Upload a document", "Notifications", and "Logout". The main content area features several service tiles: "Setup my portal" (Manage the access of employees and third party businesses), "Accounts and profiles" (Manage your personal profile, program account(s) or business), "Financial information" (View the financial transaction history, statements and invoices of this program account), "Payments" (Manage your payment options), "Declarations" (View information about commercial account declarations (CAD)), and "Rulings" (Request, view and manage your ruling requests). At the bottom, there is a "Recent Transactions" section with a "View all transactions" link and a table with columns for "Transaction date", "Description", "Amount", and "Status". To the right of this section is a "Most requested" section with a link for "Upload a document". The "Accounts and profiles" link is highlighted with a yellow box.

2. Click on the **Personal profile** link.

The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text 'Government of Canada' and 'Gouvernement du Canada'. Below this is a dark blue navigation bar with 'CARM Client Portal' on the left and user information 'Test Importer Name (RM0001)' and 'ImporterCompany3084 (549132583)' on the right. A light blue bar below the navigation bar contains a 'MENU' dropdown, an 'Upload a document' button, a 'Notifications' bell icon, and a 'Logout' button. The main content area has a 'Home' link and a section titled 'Accounts and profiles' with the subtitle 'View and make updates to your personal and business profiles'. Below this is a section titled 'Services and information' with three links: 'Personal profile' (highlighted with a yellow box), 'Business profile', and 'Program account profile'. Each link has a brief description of the service.

3. From the **Personal profile** screen, scroll down to **Settings and Preferences** and complete the following:
- Read the **Terms and Conditions** in the drop-down menu, and confirm your acceptance by checking the box
 - Select the **Subscribed** button
 - Select **English** or **French** as your preferred language

The screenshot shows the 'Settings and Preferences' screen. At the top, there is a section titled 'Settings and Preferences' with a dropdown menu labeled 'Terms of use for email notification'. Below this, there is a section with a yellow border containing the following options:

- I have read, understood and agree to the Terms and Conditions listed above.
- * Receive e-mails about notifications (required)**
 - Subscribed - I want to receive e-mails about my notifications
 - Unsubscribed - I do not want to receive e-mails about my notifications
- Note: You will still receive e-mails about urgent notifications, even if you are unsubscribed*
- * Preferred language (required)**
 - English
 - French

Once notifications are set to **Subscribed**, you will begin receiving e-mail notifications from CBSA.

Important note:

Notifications will be sent in bulk by CBSA. The only options available to users will be to either receive all notifications or to receive none. This option can be modified at any time following the above process. Remember that urgent notifications will be sent to you regardless of the notification option selected.

2.4 Notifications (view)

To view your notifications in the CARM Client Portal, follow the below steps:

1. Click the **Notifications** link. A list of notifications will display.

The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text "Government of Canada / Gouvernement du Canada". On the right side of the header, there is a language selector for "Français". Below the header, the main navigation bar includes the "CARM Client Portal" title, the user's name "Test Importer Name (RM0001) ImporterCompany3084 (549132583)", and a dropdown arrow. The navigation bar also contains links for "Upload a document", "Notifications" (highlighted with a callout box), and "Logout". Below the navigation bar, there are several sections: "Setup my portal" (Manage the access of employees and third party businesses), "Accounts and profiles" (View information about your personal profile, program account(s) or business), "Financial information", "Payments" (Manage your payment options), and "Declarations" (View information about commercial account declarations (CAD)). At the bottom, there is a "Recent Transactions" table and a "Most requested" list. The callout box states: "Your notifications can be found at the top right of the home page beside the bell icon".

| Transaction date | Description | Amount | Status |
|------------------|---------------------|--------------|-----------------|
| 2021-03-09 | Card Lot | \$ -1,000.99 | Credit open |
| 2021-03-09 | Card Lot | \$ -3,000.99 | Credit open |
| 2021-03-09 | Card Lot | \$ -2,000.99 | Credit open |
| 2021-03-05 | Misc. Invoice (K23) | \$ 1,000.00 | Receivable open |

2. Click on the **Subject** link to view the details of a notification.

Notifications

Search and read the notifications received from the CBSA.

Advanced search

Date range 2020-10-05 - 2021-04-22

| Date posted | Number | Type | Subject |
|-------------|-------------------------------------|-----------------------------|--|
| 2021-04-08 | RM0001 | Delegation changes - Client | Access permission(s) changes |
| 2021-03-24 | RM0001 | Pre-PAD Notification | Pre-Authorized Debit |
| 2021-03-24 | ImporterCompany3084 549132583RM0001 | Delegation changes - Client | Access permission(s) changes |
| 2021-03-24 | ImporterCompany3084 549132583RM0001 | Delegation changes - Client | Access permission(s) changes |
| 2021-03-16 | ImporterCompany3084 549132583 | Delegation changes - Client | Pending access request |
| 2021-03-09 | ImporterCompany3084 549132583RM0001 | Delegation changes - Client | Access permission(s) changes |
| 2021-03-09 | ImporterCompany3084 549132583RM0001 | Delegation changes - Client | Access permission(s) changes |
| 2021-03-09 | ImporterCompany3084 549132583RM0001 | Delegation changes - Client | Access permission(s) changes |

Items per page: 10 1 to 10 of 215 Page 1 of 22

Tip: You can search for desired notifications by using the Advanced search field

3. The notification details selected will then be displayed. Click the **Back** button to return to the notifications list once you are done reviewing the notification.

Government of Canada / Gouvernement du Canada

Francais

CARM Client Portal

Test Importer Name (RM0001)
ImporterCompany3084 (549132583)

MENU Upload a document Notifications Logout

Home > Notifications

Notifications details

Access permission(s) changes
Recipient: ImporterCompany3084
Type: Delegation changes - Client
Date posted: 2021-04-08

Access for 227889992 to 549132583RM0001 has been successfully changed.

Back

2.5 Uploading documents

Including additional documents helps the CBSA with their rulings decisions. Where possible, documents that support a ruling request should always be included with the initial request. If the CBSA feels that they have insufficient information to render a decision, they may request that you provide additional information in order to proceed with your ruling request.

The screenshot displays the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text "The Upload a document link" pointing to the "Upload a document" link in the navigation menu. Below the header, the "Rulings" section is visible, with a callout box pointing to the "Upload a document" link in the "Actions" column of the "Rulings" list. The "Most Requested" section is also visible, with a callout box pointing to the "Upload a document" link in the "Most Requested" column. The "Recent Transactions" table is partially visible at the bottom left.

| Transaction date | Description | Amount | Category |
|------------------|---------------------|--------------|-----------------|
| 2021-03-09 | Card | | |
| 2021-03-09 | Card | | |
| 2021-03-09 | Card Lot | \$ -2,000.99 | Credit open |
| 2021-03-05 | Misc. Invoice (K23) | \$ 1,000.00 | Receivable open |

For the purposes of this guide, we are showing the page that will appear after selecting either of the **Upload a document** links.

From this page you may proceed with the following steps:

1. Select the **Category** from the drop-down menu.
2. Enter the **Case/reference number** that the document you are uploading will be associated with/attached to.

3. Click the **Next** button.

Government of Canada / Gouvernement du Canada

601880594RM0001-Importe... (RM0001)
ImporterCompany5788 (601880594)

MENU [Upload a document](#) | [Notifications](#) | [Logout](#)

[Home](#)

Upload a document - Step 1 of 2

Select the category and case/reference number for the document(s) you want to upload

* **Category (required)**

* **Case/reference number (maximum 10 characters) (required)**

[Cancel](#) [Next](#)

4. Drag and drop the file from the specified location and click **Upload** to complete the upload process.

Attachment(s): case #8000000167

Attach any files of producers or manufacturers product literature, drawings, photographs, or schematics.

Upload files

The maximum upload size per file is 15 MB and a maximum of 10 attachments per upload.
Acceptable file types: .pdf, .doc, .docx, .xls, .xlsx, .rtf, .txt, .jpg, .jpeg, .tiff, .tif, .xps

Click or drag your file here

[Upload](#)

Important note:

You can only upload PDF, Word, Excel, RTF, JPG, TIFF and XPS documents to the CARM Client Portal.

3. Requesting a new business relationship

3.1 Account types

Within the CARM Client Portal, there are two types of accounts: Individual accounts and Business accounts.

Individual account:

In order to access a business account, it is mandatory to first have an individual account. This account requires users to complete their personal profile for the user to be granted access to the CARM Client Portal.

Create your personal profile

Your contact details will be used to communicate important updates.

User information

* First Name (required)

* Last Name (required)

Contact Information

* Telephone number(including area code) (required)

Extension

* Email address (required)

* Confirm e-mail address (required)

Settings and Preferences

* Receive e-mails about notifications (required)
 Subscribed - I want to receive e-mails about my notifications
 Unsubscribed - I do not want to receive e-mails about my notifications
Note: You will still receive e-mails about urgent notifications, even if you are unsubscribed

* Preferred language (required)
 English
 French

To learn more about setting up your Individual account and Personal Profile, see **Section – [Creating your personal profile](#)** of this document.

To learn more about setting up your notifications, see **Section – [Setup of notifications](#)**.

Business account:

Accounts for businesses exist for:

- Organizations that provide services to clients – Service Provider
- Business account that has at least one program account and performs activities as a customs broker or third party.
- Client organizations such as importers
- Any business account that has delegated their authority to a service provider.

3.2 Business relationships

Business relationships are established between a service provider and its client(s). A client (e.g., importer) can delegate access to the service provider (e.g., customs broker) for them to act on their behalf and manage their account(s) within the CBSA by establishing a relationship.

Service providers must first establish a business relationship with their clients to be able to transact with the CBSA on their behalf. Only then will the service provider be able to assign its employees to the clients' accounts to carry out the activities agreed upon in their service.

Important note:

The client determines the relationship type to grant to its service provider(s).

Within the CARM Client Portal, there are two business relationship access types that can be established between a service provider and a client.

These are:

- Business management relationship
- Program management relationship

This table shows the activities and access permissions associated with the Business management relationship and Program management relationship:

| Activities | Allowed or Restricted | View as Read-only or View and Edit |
|---|------------------------------|---|
| View business account profile (general information, ownership, addresses, business activity, settings and contacts) | Allowed | Read-only |
| View all Program accounts profile (general information, addresses, contacts, owners and sub-programs) | Allowed | Read-only |
| View the list of programs | Allowed | Read-only |
| View financial security information | Allowed | View and Edit |
| View information regarding requests (e.g., Rulings) and transactions (e.g., CAD) on the client's behalf | Allowed | View and Edit |
| Commonly restricted actions | Allowed | Refer to below |

1. **Business management relationship:** This relationship delegates access to all program accounts to the service provider, including any programs added in the future. Commonly restricted actions within a Business management relationship include the following:

- Editing the Business account or Program account information
- Viewing or editing pre-authorized debit authorizations
- Viewing collection-related notifications and payment arrangements
- Viewing or editing the client's access requests, and its employees' accesses
- Viewing or editing the client's pending business relationship requests, and its list of active business relationship

2. **Program management relationship:** This relationship delegates access to only selected program accounts to the service provider. This table shows the activities and access permissions associated with the Program management relationship:

| Activities | Allowed or Restricted | View as Read-only or View and Edit |
|---|-----------------------|------------------------------------|
| View program account profile (general information, addresses, contacts, owners and sub-programs) | Allowed | Read-only |
| View information regarding requests (e.g., Rulings) and transactions (e.g., CAD) on the client's behalf | Allowed | View and Edit |
| View Business account profile | Restricted | Not available |
| View list of programs | Restricted | Not available |
| View financial security | Restricted | Not available |
| Commonly restricted actions (refer to previous page) | Restricted | Not available |

To learn more about managing business relationships, please reference the following guide:

- [User guide – Delegation of Authority](#)

4. Resources

There are several resources that are available surrounding the CARM Client Portal to help support new users:

1. **Instructional videos:**

- Dedicated instructional videos for portal utilization including step-by-step videos on: Creating and linking individual and business accounts, Delegating authority, Financial information, and more.

2. **FAQ:**

- The CBSA has provided answers to frequently asked questions that clients may have regarding the portal.

3. **Onboarding guides:**

- These guides will help TCPs understand how to use the CARM Client Portal, with information on the key benefits and capabilities that the portal offers.