



CARM Client Portal

User Guide

First time set up - Register my
business scenarios

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Purpose of this guide

This guide explains the different situations that can occur for businesses when registering on the CARM Client Portal (CCP) for the first time. The portal is very specific, depending on the various situations for both resident businesses and non-resident businesses. There are 5 general scenarios that are explained, it is important to take the time to find the correct scenario that aligns with your business situation.

Audience

This guide is for the first user to register the business on the CARM Client Portal for both resident and non-resident businesses. 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.

Preamble

As a **Resident Business** – if you are not sure if you have a 9 digit Business Number (BN9) with the Canada Revenue Agency (CRA), you may enquire via **1-800-959-5525**.

Where the Resident business does not already have a BN9, the following ownership types may request one via the CARM Client Portal (CCP) as explained in Scenarios 1 and 5 below:

- Sole Proprietors (Individual);
- Partnerships; and
- Incorporated businesses who have not received a BN directly from their incorporating authority or the CRA.

As a **Non-Resident business** you must obtain a 9 digit Business Number (BN9) from the Canada Revenue Agency (CRA) prior to continuing with registering the business on the CARM Client Portal (CCP) by calling the [Non-Resident Registration and Security line](#).

If the Non-Resident business is not certain if they have a BN9 with the CRA, they may enquire by calling the [Non-Resident Registration and Security line](#).

Status Check: If the business is not certain if they have an active CBSA Program Account (RM or other), the owner or authorized representative may enquire via the [CARM client service and helpdesk](#).

Please provide the following information when filling in [Client support contact form](#) request:

Legal Entity Name, BN9, Legal Entity Address, state that the business is enquiring about status of any CBSA Program Accounts on a BN9

Please use the following wording in the Description field:

Request CCPA for status check of CBSA Program Account(s)

If all existing CBSA Program Account(s) for a business are **closed (inactive)**, the client will not be able to continue with the “Register my business” steps on the CCP.

Reactivate Account: To reactivate a closed CBSA program account, the owner or authorized representative may submit a request to the [CARM client service and helpdesk](#).

Please provide the following information when filling in [Client support contact form](#) request:

Legal Entity Name, BN9, Legal Entity Address, state that the business is requesting reactivation of a CBSA Program Account, provide the CBSA Program ID / RM number

Please use the following wording in the Description field:

Request CCPA to reactivate an existing CBSA Program Account(s)

Once at least one existing account has been reactivated, the business may follow either Scenario 3 or 5 found below.

Contact

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

Scenario 1 – Business has no BN9 and no CBSA program account

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, as per instructions in the [User Guide – Onboarding to the CARM Client Portal](#).
2. When you arrive at this **First time setup** page, the first user for the business will select **Register my business** (found on the left side of the screen under **Create Business portal account**).

First time setup

Important

Please choose option according to the action you require. Select **Create business portal account** if the business is not yet setup on the CARM Client Portal. Select **Request access to my employer** if the business portal account has been setup and you require access to the account. The business account manager is responsible to action your employee request.

Create business portal account

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.

Register my business

Request access to my employer

Choose this option if your employer has created the business account and you require access to it. **Do not** select this option if you are attempting to create the business account.

You will need to know your employer's 9-digits business number (BN9).

Find a business

* Business number (BN9) (required)

Search

Note:

Once the business is registered, other users will select **Request access to my employer**. For more information, please refer to the [User Guide – Onboarding to the CARM Client Portal](#)

3. Answer the **Requirements Validation** questions and click on **Next**.

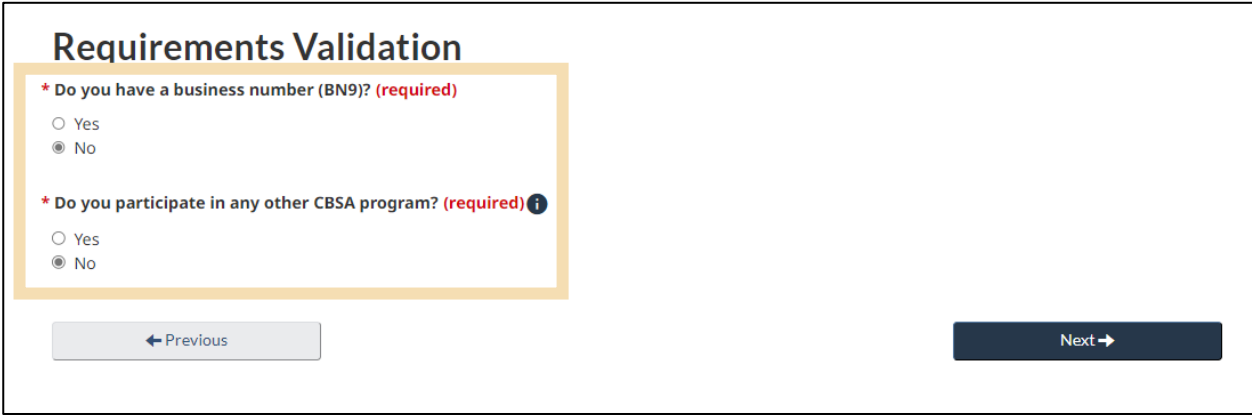
Note:

- Client has no 9 digit Business Number with the Canada Revenue Agency (CRA)
- Client has no other CBSA Program Account (for example carrier code, warehouse sub-location code)

VERY IMPORTANT: Non-Resident businesses should not follow this registration process (see above Preamble), once a BN9 has been obtained, the business would follow the Scenario 2 process below.

VERY IMPORTANT: Only Resident businesses may follow this registration process by responding:

- 'No' to having a BN9
- 'No' to having another CBSA Program Account



The screenshot shows a web form titled "Requirements Validation". It contains two mandatory questions, each marked with a red asterisk and the word "(required)". The first question is "Do you have a business number (BN9)?" with radio button options for "Yes" and "No", where "No" is selected. The second question is "Do you participate in any other CBSA program?" with radio button options for "Yes" and "No", where "No" is selected. An information icon (i) is next to the second question. At the bottom of the form, there are two buttons: "Previous" with a left arrow and "Next" with a right arrow.

Clients continue by responding to mandatory questions and you must enrol in at least one CBSA Program.

For more guidance see the [User Guide - Register for a new business number \(Scenario 1\)](#).

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

Scenario 2 – Business has BN9 but no importer-exporter RM and no other CBSA program account

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, as per instructions in the [User Guide – Onboarding to the CARM Client Portal](#).
2. When you arrive at this **First time setup** page, the first user for the business will select **Register my business** (found on the left side of the screen under **Create business portal account**).

First time setup

Important

Please choose option according to the action you require. Select **Create business portal account** if the business is not yet setup on the CARM Client Portal. Select **Request access to my employer** if the business portal account has been setup and you require access to the account. The business account manager is responsible to action your employee request.

Create business portal account

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.

Register my business

Request access to my employer

Choose this option if your employer has created the business account and you require access to it. **Do not** select this option if you are attempting to create the business account.

You will need to know your employer's 9-digits business number (BN9).

Find a business

* Business number (BN9) (required)

Search

3. Answer the **Requirements Validation** questions and click on **Next**.

Note:

- Client has a 9 digit Business Number with the Canada Revenue Agency
 - Client has no importer or exporter RM account
 - Client has no other CBSA Program Account (for example carrier code, warehouse sub-location code)
- * clients who already have another CBSA Program Account should go to Scenario 4 below*

Both Resident and Non-Resident businesses may follow this registration by responding:

- 'Yes' to having a BN9
- 'No' to having an RM
- 'No' to having another CBSA Program Account * clients who already have another CBSA Program Account should go to Scenario 4 below*

The screenshot shows a web form titled "Requirements Validation". It contains three mandatory questions, each marked with a red asterisk and the word "(required)". The first question is "Do you have a business number (BN9)?" with radio buttons for "Yes" (selected) and "No". The second question is "Do you have a program account number (RM)?" with radio buttons for "Yes" and "No" (selected). The third question is "Do you participate in any other CBSA program?" with radio buttons for "Yes" and "No" (selected). Each question has an information icon (i) to its right. At the bottom of the form, there are two buttons: "Previous" with a left arrow and "Next" with a right arrow.

Continue by responding to mandatory questions and you must enrol in at least one CBSA Program.

For more guidance see the [User Guide - Register my business with no existing CBSA program accounts \(Scenario 2\)](#).

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

Scenario 3 – Business has BN9 and has an existing importer-exporter RM

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, as per instructions in the [User Guide – Onboarding to the CARM Client Portal](#).
2. When you arrive at this **First time setup** page, the first user for the business will select **Register my business** (found on the left side of the screen under **Create Business portal account**).

First time setup

Important

Please choose option according to the action you require. Select **Create business portal account** if the business is not yet setup on the CARM Client Portal. Select **Request access to my employer** if the business portal account has been setup and you require access to the account. The business account manager is responsible to action your employee request.

Create business portal account

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.

Register my business

Request access to my employer

Choose this option if your employer has created the business account and you require access to it. **Do not** select this option if you are attempting to create the business account.

You will need to know your employer's 9-digits business number (BN9).

Find a business

* Business number (BN9) (required)

Search

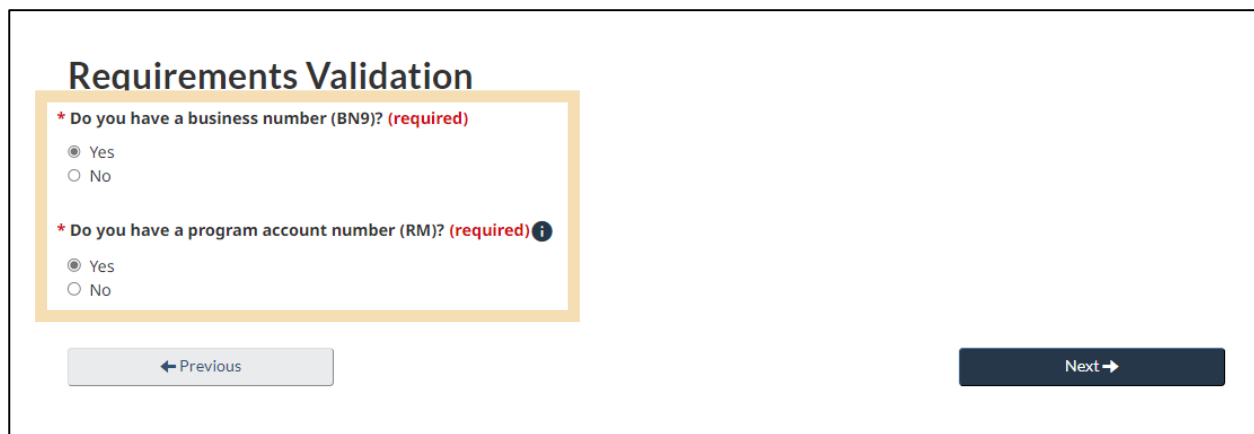
3. Answer the **Requirements Validation** questions and click on **Next**.

Note:

- Client has a 9 digit Business Number with the Canada Revenue Agency
- Client has an existing importer-exporter RM account

Both Resident and Non-Resident businesses may follow this registration by responding:

- 'Yes' to having a BN9
- 'Yes' to having an RM

A screenshot of a web form titled "Requirements Validation". The form contains two mandatory questions, each with "Yes" and "No" radio button options. The first question is "Do you have a business number (BN9)? (required)" and the second is "Do you have a program account number (RM)? (required)". Both "Yes" options are selected. At the bottom of the form, there are two buttons: "Previous" with a left arrow and "Next" with a right arrow. The "Next" button is highlighted in dark blue.

Requirements Validation

* Do you have a business number (BN9)? (required)

☒ Yes
☐ No

* Do you have a program account number (RM)? (required) ⓘ

☒ Yes
☐ No

← Previous

Next →

Continue by responding to mandatory questions.

For more guidance see [Register my business with an existing importer-exporter RM \(Scenario 3\)](#) user guide.

All existing **active** CBSA program accounts for your business will load into the CARM Client Portal.

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.

Scenario 4 – Business has BN9, no importer-exporter RM, and does have another CBSA program account

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, as per instructions in the [User Guide – Onboarding to the CARM Client Portal](#).
2. When you arrive at this **First time setup** page, the first user for the business will select **Register my business** (found on the left side of the screen under **Create Business portal account**).

First time setup

Important

Please choose option according to the action you require. Select **Create business portal account** if the business is not yet setup on the CARM Client Portal. Select **Request access to my employer** if the business portal account has been setup and you require access to the account. The business account manager is responsible to action your employee request.

Create business portal account

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.

Register my business

Request access to my employer

Choose this option if your employer has created the business account and you require access to it. **Do not** select this option if you are attempting to create the business account.

You will need to know your employer's 9-digits business number (BN9).

Find a business

* Business number (BN9) (required)

Search

3. STOP, do not proceed with registering your business on the CCP without contacting the CARM Client Service and Helpdesk first, see below.

Note:

- Client has a 9 digit Business Number with the Canada Revenue Agency
- Client has no importer-exporter RM account
- Client has another CBSA Program Account (for example carrier code, warehouse sub-location code)

STOP, VERY IMPORTANT, if you have a BN9, do not have an importer-exporter RM and are enrolled in a CBSA Program other than importer-exporter (such as Carrier or Warehouse) you must complete the process explained in Step 4 prior to continuing with your registration in the portal.

4. At this point, **both Resident and Non-Resident businesses** need to communicate with the [CARM client service and helpdesk](#) to link the business's BN9 and CBSA Program Account Identifier(s) for all "Other CBSA Program Accounts".

Please include the following when filling in the [Client support contact form](#) request:

Legal Entity Name, BN9, Legal Entity Address, state that the business is enquiring about linking their BN9 to their CBSA Program Accounts, provide the CBSA Program Account Identifier(s) (for example Carrier Code, Warehouse sub-location code)

Use the following wording in the Description field:

Request CCPA to link BN9 to CBSA Program Account (carrier code/warehouse)

Only for this specific Scenario 4, the CBSA must link the existing BN9 to the existing CBSA Program Account(s) in order for the business to register on the CARM Client Portal. Continuing with CCP registration without taking this Step 4 first, will create a failed registration process and cause delays.

Multiple submissions for the same request will cause delays – you will receive an email confirmation once you can continue with registering on the portal.

5. Once the business has been informed that the BN9 and CBSA Program Account have been linked, businesses may proceed with this registration scenario by responding:
 - 'Yes' to having a BN9
 - 'No' to having an RM
 - 'Yes' to having another CBSA Program Account
 - Select one of the 4 program types

If you have more than one program type, just select one; at the end of your successful registration process all existing active CBSA program accounts for your business will load into the CARM Client Portal.

Requirements Validation

*** Do you have a business number (BN9)? (required)**

☒ Yes
☐ No

*** Do you have a program account number (RM)? (required) i**

☐ Yes
☒ No

*** Do you participate in any other CBSA program? (required) i**

☒ Yes
☐ No

*** Identify the program type (required) i**

☐ Sufferance Warehouse
☐ Carrier
☐ Duty-free Shop
☐ Bonded Warehouse

← Previous

Next →

Continue by responding to mandatory questions.

For more guidance see [Register my business with a BN9 and existing CBSA program but no importer-exporter RM \(Scenario 4\)](#) user guide.

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

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

Scenario 5 – Business has no BN9, no RM, and does have another CBSA program account

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, as per instructions in the [User Guide – Onboarding to the CARM Client Portal](#).
2. When you arrive at this **First time setup** page, the first user for the business will select **Register my business** (found on the left side of the screen under **Create Business portal account**).

First time setup

Important
Please choose option according to the action you require. Select **Create business portal account** if the business is not yet setup on the CARM Client Portal. Select **Request access to my employer** if the business portal account has been setup and you require access to the account. The business account manager is responsible to action your employee request.

Create business portal account

Are you a **business account manager** who wants to use the CARM Client Portal for your business?

You will need to have access to privileged information for this process.

Register my business

Request access to my employer

Choose this option if your employer has created the business account and you require access to it. **Do not** select this option if you are attempting to create the business account.

You will need to know your employer's 9-digits business number (BN9).

Find a business

* Business number (BN9) (required)

Search

3. Answer the **Requirements Validation** questions and click on **Next**.

Note:

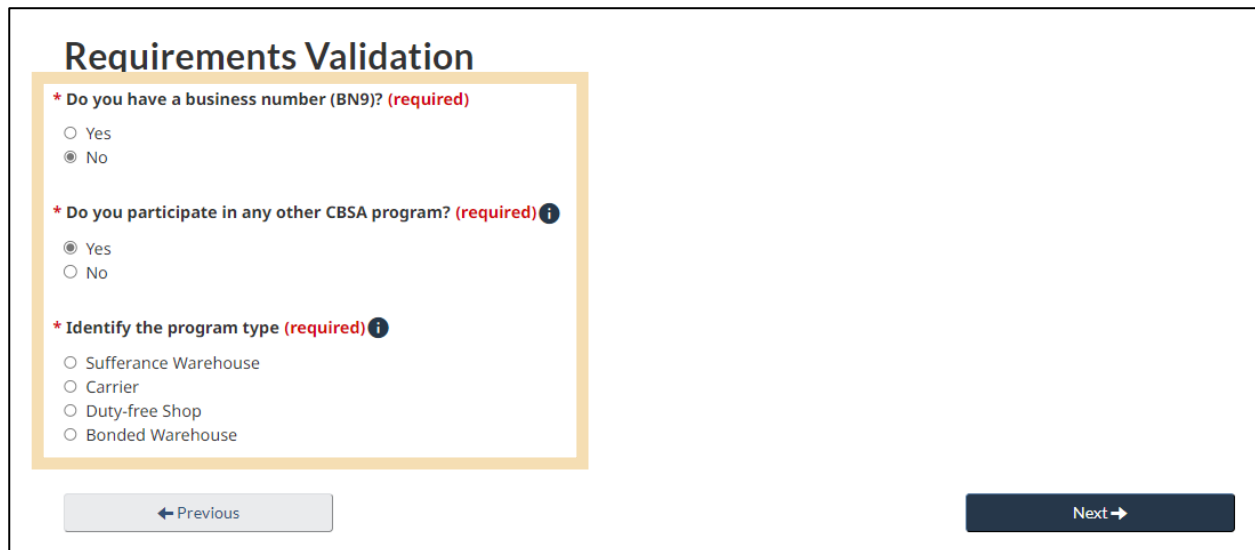
- Client has no 9 digit Business Number with the Canada Revenue Agency
- Client has another CBSA Program Account (for example carrier code, warehouse sub-location code)

VERY IMPORTANT: Non-Resident businesses should not follow this registration process, once a BN9 has been obtained from the CRA, the business would follow the Scenario 4 process above.

VERY IMPORTANT: Only Resident businesses may follow this registration process by responding:

- 'No' to having a BN9
- 'Yes' to having another CBSA Program Account
- Select one of the 4 program types

If you have more than one program type, just select one and at the end of your successful registration process, all active CBSA program accounts will load into the CARM Client Portal.

A screenshot of a web form titled "Requirements Validation". The form contains three mandatory questions, each marked with a red asterisk and the word "(required)". The first question is "Do you have a business number (BN9)?", with radio buttons for "Yes" and "No", where "No" is selected. The second question is "Do you participate in any other CBSA program?", with radio buttons for "Yes" and "No", where "Yes" is selected. The third question is "Identify the program type", with radio buttons for "Sufferance Warehouse", "Carrier", "Duty-free Shop", and "Bonded Warehouse". All three questions are enclosed in a yellow rectangular border. At the bottom of the form, there are two buttons: a light gray "Previous" button with a left arrow and a dark blue "Next" button with a right arrow.

Click on **Next** and continue by responding to mandatory questions.

For more guidance see [Register for a new BN9 with an existing CBSA program but no importer-exporter RM \(Scenario 5\)](#) user guide.

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

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