



Canada Border
Services Agency

Agence des services
frontaliers du Canada

Trade Chain Partner User Guide

Onboarding to the CARM Client Portal

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1. Onboarding to the CARM Client Portal

1.1 - Overview

The CARM Client Portal (CCP) 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 to fully set up their account



1.2 - Accessing the CARM Client Portal (CCP)

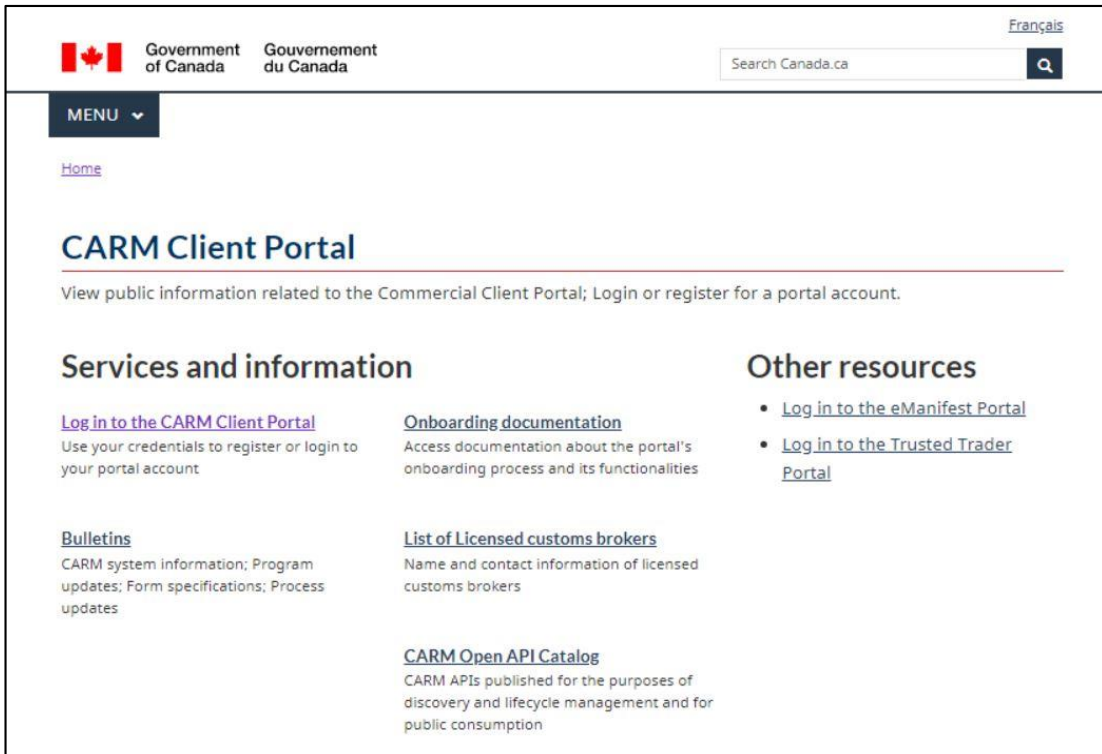
To access the CARM Client Portal (CCP), individuals must first open the CBSA webpage, the link to which can be found below:

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

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

Important Note:

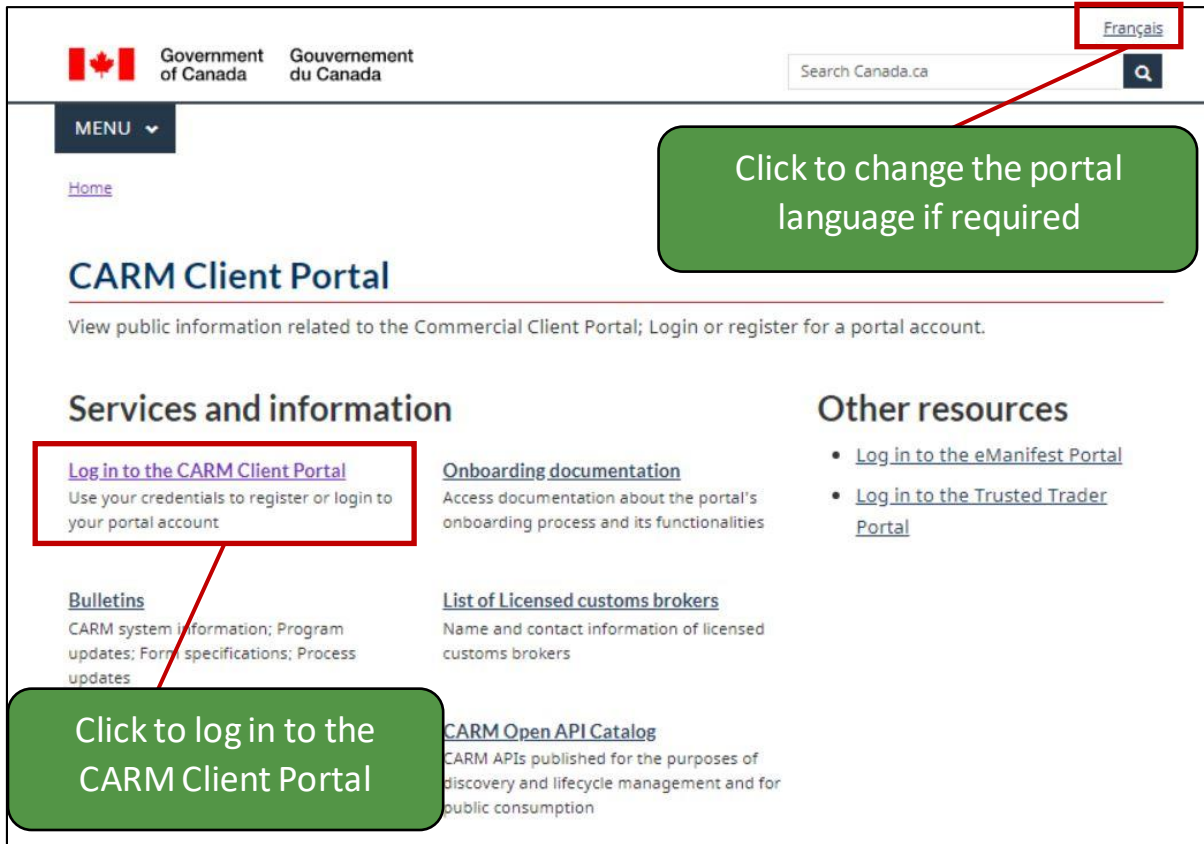
Existing importers and customs brokers can onboard to the CCP by following the steps in this user guide. Trade consultants may do so by contacting the CBSA at 1-800-461-9999.



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’**.

From here, you will be directed to complete the initial set up process that will enable you to access the CCP’s main functionalities.

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 CCP access page where you will be prompted to log in using one of the following options:




- **Continue to Sign-In Partner**

• Continue to GC Key

The screenshot shows the Government of Canada website header with the CARM Client Portal breadcrumb. The main heading is "Access the CARM Client Portal". Under "Option 1", there is a button "Continue to Sign-in Partner" followed by a list of bullet points explaining the process and a link to "View list of Sign-In Partners". Under "Option 2", there is a button "Continue to GCKey" followed by a list of bullet points explaining the GCKey login process.

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**

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 in 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](#)









Select Sign-In Partner

By selecting a Sign-In Partner, you are agreeing to the [Terms and Conditions](#) and [Privacy Notice of Government Sign-In by Verified.Me](#)

SECURE KEY *Concierge* is now  Government Sign-In by Verified.Me

SecureKey Concierge is rebranding to Government Sign-In by Verified.Me

For you, nothing changes. You can continue to rely on the same secure sign in service with the financial institution that you have used for many years with SecureKey Concierge. For us, we are unifying who we are, what we look like and how we talk about the tools in our digital identity network to serve you better. [Learn how Government Sign-In by Verified.Me works](#)

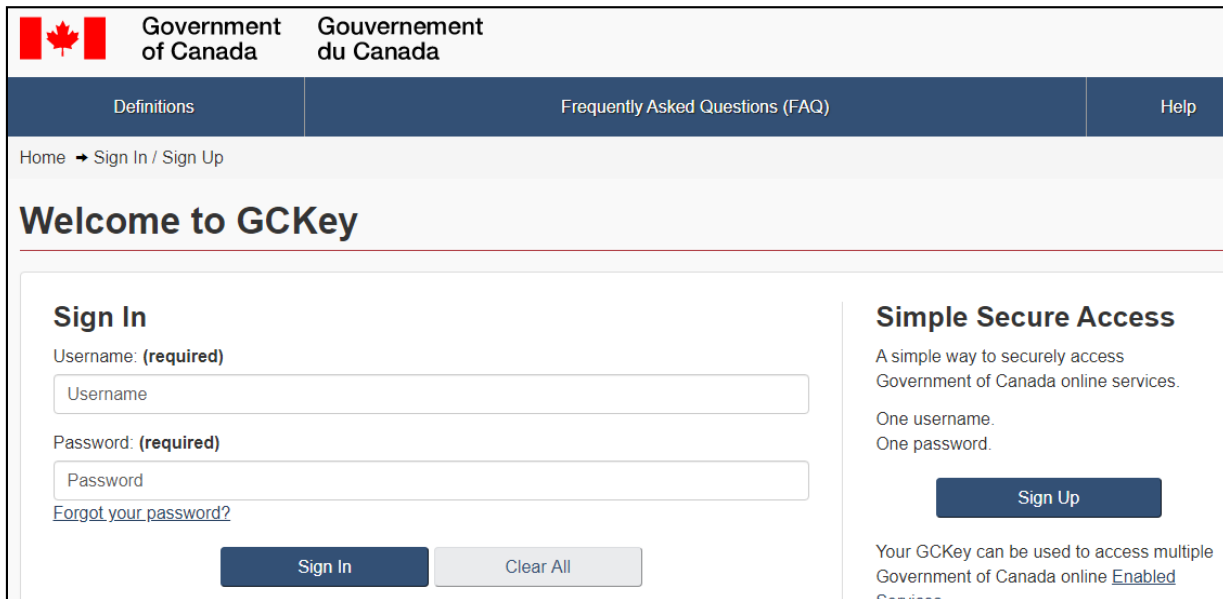
1.4 - Logging in Using an Existing GCKey

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.

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.



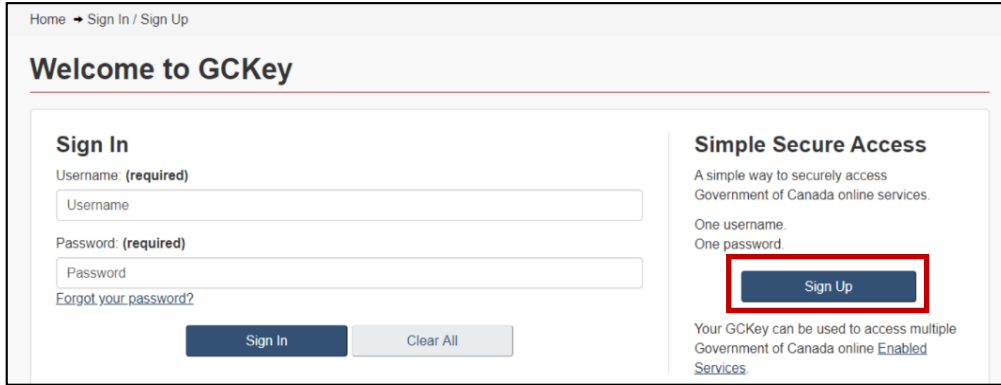
The screenshot shows the GCKey login page for the Government of Canada. At the top, there is a header with the Canadian flag and the text "Government of Canada" and "Gouvernement du Canada". Below the header is a navigation bar with "Definitions", "Frequently Asked Questions (FAQ)", and "Help". The main content area has a breadcrumb "Home → Sign In / Sign Up" and a heading "Welcome to GCKey". On the left, there is a "Sign In" section with fields for "Username: (required)" and "Password: (required)", a "Forgot your password?" link, and "Sign In" and "Clear All" buttons. On the right, there is a "Simple Secure Access" section with a "Sign Up" button and text explaining that a GCKey can be used to access multiple Government of Canada online services.

1.5 - Creating a New GCKey

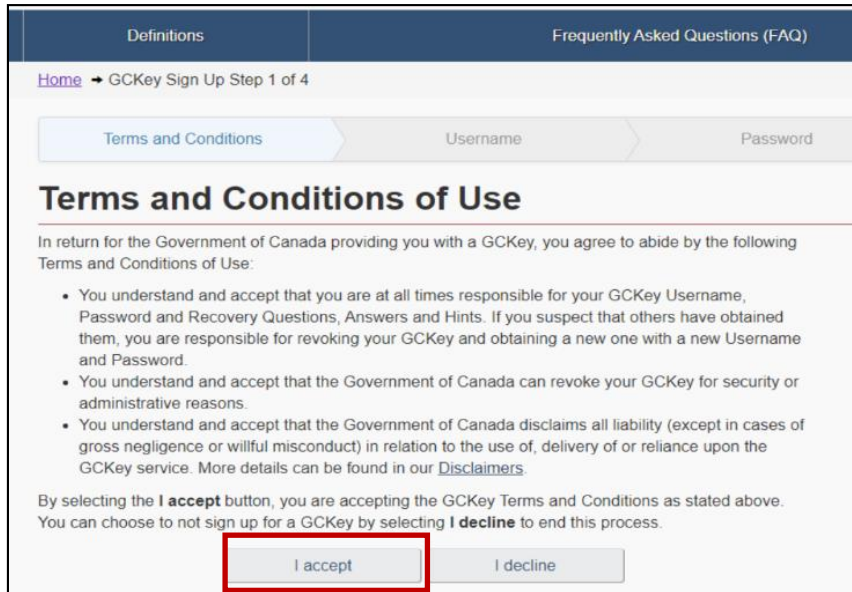
Creating a new GCKey will allow users to access the CARM Client Portal as well as certain other governmental programs and services. Note that all information will be kept private following the Government of Canada privacy standards.

To create a new GCKey, follow the below steps:

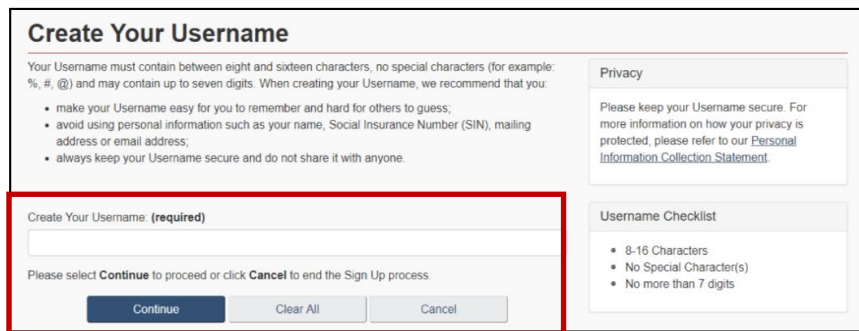
1. Click on the ‘Sign Up’ button.



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



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



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

Create Your Password

Your Password must be between eight and sixteen characters, contain at least one upper case letter, one lower case letter and one digit, and must not contain 3 or more consecutive characters from your Username.

Create Your Password: **(required)**

Confirm Your Password: **(required)**

Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.

Privacy

Please keep your Password secure. For more information on how your privacy is protected, please refer to our [Personal Information Collection Statement](#)

Password Checklist

- 8-16 Characters
- Does not contain 3 consecutive characters from Username
- Valid characters

5. Create your Recovery Questions and click the **'Continue'** button.

Create Your Recovery Questions, Answers and Hints

Your Recovery Question, Answers and Hints are used to help you if you forget your Password. Please complete all the required fields below to continue the Sign Up process.

Select a Recovery Question: **(required)**

Please select a question...

My Recovery Answer: **(required)**

My Memorable Person: **(required)**

My Memorable Person Hint:

My Memorable Date (YYYY-MM-DD): **(required)**

My Memorable Date Hint:

Please select **Continue** to proceed or click **Cancel** to end the Sign Up process.

Privacy

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](#)

i

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 (?).

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.

- Click the **‘Continue’** button on the confirmation page to finalize the process.

1.6 - 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.



To learn more about subscribing to email notifications, see section [2.3 – Notifications \(Setup\)](#)

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

1.7 - 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'**.

First time setup

Request access to my employer

Are you an **employee** who needs to be associated to your employer's registered business?

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

Find a business

* Business number (BN9) (maximum 9 characters) (required)

Register my business

Are you a **business account manager** who wants to use the commercial client portal for your business?

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

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.

First time setup

Request access to my employer

Are you an **employee** who needs to be associated to your employer's registered business?

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

Find a business

* Business number (BN9) (maximum 9 characters) (required)

Found match

Business operating/trade name
ImporterCompany1755

Specify why you need access

* Comments (maximum 256 characters) (required)

| This field is required.

Register my business

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.

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 CCP 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:

[Trade Chain Partner 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, it displays the Government of Canada logo and the text 'Government of Canada' and 'Gouvernement du Canada'. Below this is the 'CARM Client Portal' header. A navigation menu includes 'Home' and 'Setup my Portal'. The main content area is titled 'Business linking requirements' and contains the following text:

To link your business to the portal you will need a **Business Number (BN)** and an **import-export program account (RM)**.

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

An Import-export program account number is represented within the Business Number RM Account (BN15). It is a 15-digit number assigned by the Canada Revenue Agency (CRA), made up of the business's 9 digit business number followed by a 6 digit alpha-numeric number used to identify the business's import-export accounts (e.g., 123456789RM0001).

An example of a Business Number RM account

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

You can register for both a Business Number and an import-export program account by following the CRA's Business Registration Online (BRO) instructions by [clicking here](#).

If you already have a Business Number RM account, click next to continue linking your business.

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) ⓘ

RM

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

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)

Input your business information, ensuring that it is identical to the information that the Canada Revenue Agency (CRA) has on file. Even the punctuation used must match the information on file. Any differences will result in an error message.

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](#)

After inputting the Business Number (BN) and the Program Reference Number (RM), you will then be required to validate both your business information, and any recent transaction information (see screenshots on the following page).

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
100001254

* Legal entity name (max. 175 characters) (required) ⓘ
 This field is required.

Legal entity address details

Enter the information from one of the addresses (physical, mailing or books and records) provided to the CRA when you registered your business.

* Address Line 1 (required)
 This field is required.

Address Line 2

P.O box/R.R

* Country (required)
 This field is required.

Validate your transaction information

Answer the following questions regarding your Statement of Account (SOA) or Daily Notice (DN). If you encounter errors, make sure you have entered the appropriate answer and verify your spelling.

* Question 1 (required)
 This field is required.

* Question 2 (required)

You will need to answer two or three questions, depending on your account type. The information can be found on your most recent Daily Notice or Statement of Account. You can obtain these from your broker if you do not receive them directly. Your answers must be identical to that found on the Daily Notice or Statement of Account, and should only be entered using numbers and decimals. Using dollar signs and commas will result in an error message.

Question 1

*** Question 1 (required)**

What is the transaction number and total duties and taxes of one of your recent transactions? ▾

Transaction number
13409538908576

*** Total duties and taxes (required)**

0

A transaction number from your 5 most recent transactions will be displayed. Enter the total of duties and taxes that were owing for the given transaction number.

Question 2

What is the exact value of your most recent payment? ▾

***Recent payment amount (Required)**

\$CA

You will need the exact value of your most recent payment. This can be found on your Daily Notice or Statement of Account.

Question 3

What is the balance of your last statement of account? ▾

***Last statement of account balance (Required)**

\$CA

You will need the most recent Statement of Account.

Please make note of the following important points to consider during this initial setup process:

- Each user should have their own set of credentials and personal profile.
- Only one set of credentials can be used on a user's account (GCKey or a Sign-In Partner).
- The CBSA cannot retrieve lost credentials (username or password).



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 CCP home page. As a GCKey user 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 a '**Terms and Conditions of Use**' screen of the CCP (see screenshot on the next page).

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

- Selecting the **'Accept Terms'** button will take you to the CCP home page.
- Selecting the **'I DO NOT Accept'** button will cancel the process.

2.2 - Functions Available on the CCP 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 portal.

The screenshot shows the CARM Client Portal interface. At the top, it displays the Government of Canada logo and the user's name: "Test Importer Name (RM0001) ImporterCompany3084 (549132583)". A "MENU" dropdown is highlighted with a red box. Below the menu, six numbered callouts point to specific features:

- 1 Setup my portal**: Manage the access of employees and third party businesses.
- 2 Accounts and profiles**: View information about your personal profile, program account(s) or business.
- 3 Financial information**: View the financial transaction history, statements and invoices of this program account.
- 4 Payments**: Manage your payment options.
- 5 Declarations**: View information about commercial account declarations (CAD).
- 6 Rulings**: Request, view and manage your ruling requests.

At the bottom left, there is a "Recent Transactions" table with a "View all transactions" link. At the bottom right, there is a "Most requested" section with a list of frequently accessed features.

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)*

Government of Canada / Gouvernement du Canada

CARM Client Portal

Test Importer Name (RM0001)
ImporterCompany3084 (549132583)

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

[Home](#)

Setup my portal

Manage the access of this portal account.

Services and information

<p>Manage my employees</p> <p>Manage the access of your employees and pending requests.</p>	<p>Manage my business relationships</p> <p>Manage the business relationships and access requests.</p>	<p>Manage my client groups</p> <p>Create and manage the group of clients.</p>
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To learn more about the management of employees and clients, please reference the following guide:



[Trade Chain Partner 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, there is a header with the Government of Canada logo and the text 'Government of Canada' and 'Gouvernement du Canada'. On the right side of the header, there is a link for 'Français'. Below the header, there is a dark blue navigation bar with the text 'CARM Client Portal' on the left and a user profile section on the right showing '601880594RM0001-Importe... (RM0001)' and 'ImporterCompany5788 (601880594)'. Below the navigation bar, there is a light blue bar with 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 and a section titled 'Accounts and profiles' with a subtitle 'View and make updates to your personal and business profiles'. Below this, there is a section titled 'Services and information' with three columns of links and descriptions: 'Personal profile' (Maintain Individual profile information and portal preferences), 'Business profile' (View information about your business including: Business information, Address(es) and Ownership), and 'List of program accounts' (A list of all the program accounts associated to your business). There is also a 'Program account profile' link with a description: 'Program account profile includes your program RM number, program name and addresses.'

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, 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, 'Upload a document', 'Notifications', and 'Logout' links. The main content area features a 'Home' link, a 'Financial information' section with a sub-header and a description 'View a detailed account history, statements and invoices.', and a 'Services and information' section. Under 'Services and information', there are three columns: 'Transaction History' (describing viewing transactions and making payments), 'Statement of account' (describing statements with the CBSA), and 'CBSA Invoices' (describing invoices billed by the CBSA).

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, there is a header with the Government of Canada logo and name in both English and French. Below this is a dark blue navigation bar with 'CARM Client Portal' on the left and user information '866323893RM0001-Importe... (RM0001) ImporterCompany7337 (866323893)' on the right. A light blue secondary 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, a 'Payments' section with a red underline, and a 'Services and information' section. Under 'Services and information', there are two links: 'Apply credits as payment' and 'Pre-authorized debit'. The 'Pre-authorized debit' link is highlighted, and its description reads: 'A pre-authorized debit agreement allows you to set up pre-authorized deductions from your bank account on a monthly basis.'

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

[Trade Chain Partner User Guide – Financial Information and 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.

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

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

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.

eg: Frozen Durian

Cancel

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.

Additional information about the Duties and Taxes Calculator, and the Classification Tool can be found in both the below document and the below video:



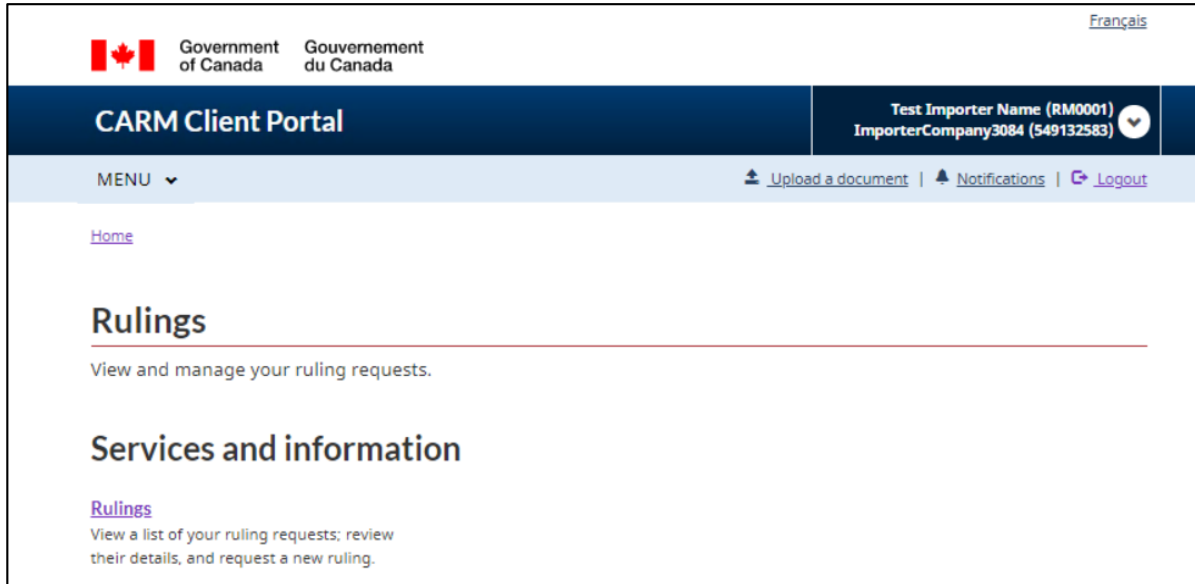
[Trade Chain Partner User Guide – Financial Information and Tools in the CARM Client Portal](#)



[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 through the following link:



- 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:

Trade Chain Partner User Guide – Managing Rulings



Understanding Ruling Statuses in the CARM Client Portal

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.

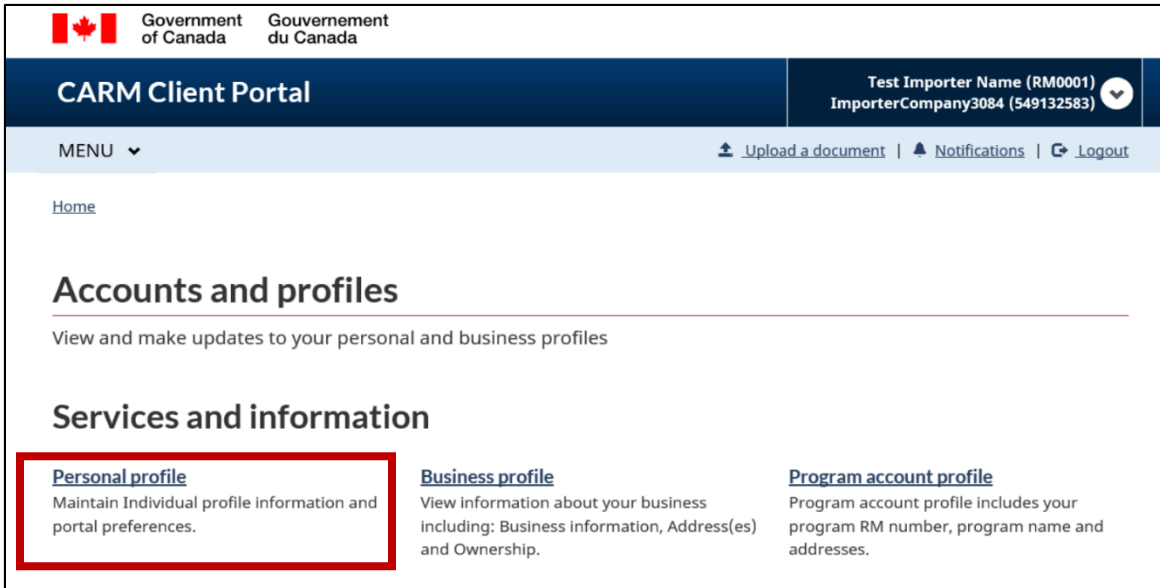
To setup notifications, follow the below steps:

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

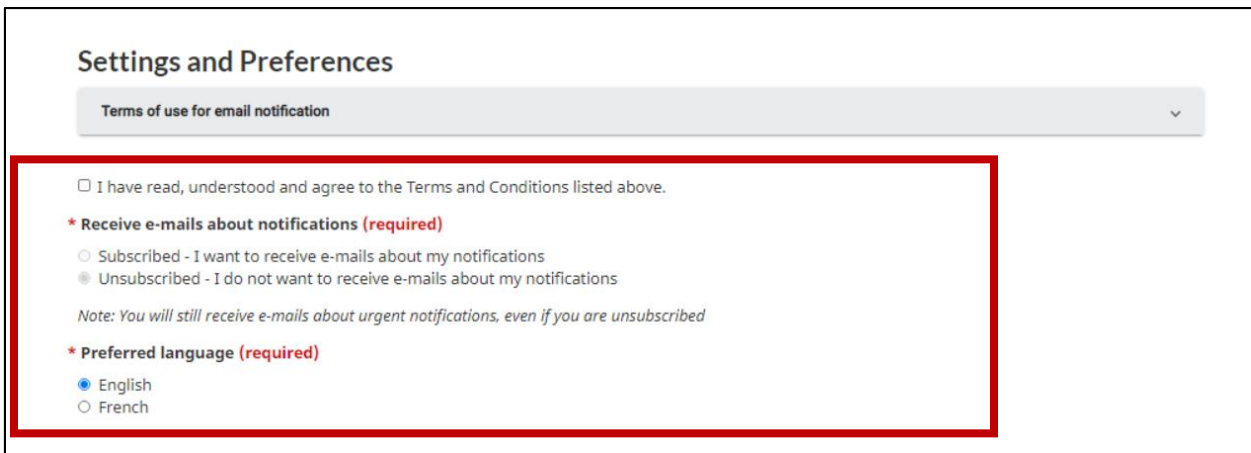
The screenshot shows the CARM Client Portal interface. At the top, there is a header with the Government of Canada logo and the text 'Government of Canada' and 'Gouvernement du Canada'. On the right, there is a language selector for 'Français'. Below the header, the main navigation bar includes 'CARM Client Portal' and user information: 'Test Importer Name (RM0001)' and 'ImporterCompany3084 (549132583)'. A 'MENU' dropdown is visible on the left, and utility links for 'Upload a document', 'Notifications', and 'Logout' are on the right. The main content area features several menu items: 'Setup my portal', 'Accounts and profiles' (highlighted with a red box), 'Financial information', 'Payments', 'Declarations', and 'Rulings'. Below these is a 'Recent Transactions' table with columns for 'Transaction date', 'Description', 'Amount', and 'Status'. A 'Most requested' sidebar on the right lists frequently accessed features like 'Upload a document' and 'Request a ruling'.

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 **‘Personal profile’** link.



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



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 CCP, follow the below steps:

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

Your notifications can be found at the top right of the home page beside the bell icon

CARM Client Portal

Test Importer Name (RM0001)
ImporterCompany3084 (549132583)

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

Last logged in 2021-04-21 14:08 ET

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
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).

Rulings
Request, view and manage your ruling requests.

Recent Transactions ⓘ [View all transactions](#)

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

Most requested

- [Upload a document](#)
- [Manage pending employee requests](#)
- [Manage pending third party requests](#)
- [Transaction history](#)
- [Request a ruling](#)

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 - ...	Access permission(s)...
2021-03-25	RM0001	Pre-PAD Notification	Pre-Authorized Debit...
2021-03-24	ImporterCompany3084 549132583RM0001	Delegation changes - ...	Access permission(s)...
2021-03-24	ImporterCompany3084 549132583RM0001	Delegation changes - ...	Access permission(s)...
2021-03-16	ImporterCompany3084 549132583	Delegation changes - ...	Pending access requ...
2021-03-09	ImporterCompany3084 549132583RM0001	Delegation changes - ...	Access permission(s)...
2021-03-09	ImporterCompany3084 549132583RM0001	Delegation changes - ...	Access permission(s)...
2021-03-09	ImporterCompany3084 549132583RM0001	Delegation changes - ...	Access permission(s)...

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

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

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 in their rendering of 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 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". The main header area includes "CARM Client Portal" and "Test Importer Name (RM0001)". A menu dropdown is visible on the left. The main content area is divided into several sections: "Setup my portal", "Accounts and profiles", "Financial information", "Payments", "Declarations", and "Rulings". Below these sections, there is a "Recent Transactions" table and a "Most requested" list. Two callouts highlight specific links: one points to the "Upload a document" link in the "Most requested" list, and another points to the "Upload a document" link in the "Actions" column of the "Rulings" list.

The 'Upload a document' link

The document attachment link found in the 'Actions' column of your displayed 'Rulings' list

The 'Upload a document' link in the 'Most Requested' column

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. Inv		open

- [Upload a document](#)
- [Manage pending employee requests](#)
- [Manage pending third party requests](#)
- [Transaction history](#)
- [Request a ruling](#)

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.

The screenshot displays 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 '601880594RM0001-Importe... (RM0001) ImporterCompany5788 (601880594)' on the right. A navigation bar below the header contains 'MENU', 'Upload a document', 'Notifications', and 'Logout'. The main content area is titled 'Upload a document - Step 1 of 2' and includes the instruction 'Select the category and enter a case or reference number associated to the document(s) you want to upload'. The form contains two required fields: 'Category (required)' and 'Case/reference number (maximum 10 characters) (required)'. A 'Next' button is located at the bottom right of the form area.

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

Important Note:

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

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 CCP.

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 [1.6 – Creating your personal profile](#) on Page 12 of this document.

To learn more about setting up your notifications, see section [2.3 – Notifications \(Setup\)](#).

Business Account:

Accounts for Businesses exist for:

- Organizations that provide services to clients – service providers
- Client organizations such as importers

Service Provider	Client
Business account that has at least one program account, and performs activities as a customs broker or Third Party.	Any business account that has delegated their authority to a service provider.

Important Note:

Employees of both service providers and clients will have accounts tied to their organization’s business account.

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.

Within the CCP, 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*

Important Note:

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

These tables show the activities and access permissions associated with the Business Management Relationship and Program Management Relationship :

1. Business Management Relationship: This relationship delegates access to all program accounts to the service provider, including any programs added in the future.

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

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

See next page for *Program Management Relationship* information

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:

Trade Chain Partner User Guide – Delegation of Authority

4. Resources

There are several resources that will be 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. Chatbot:

- The CBSA will introduce a chatbot that includes scripts prepared for users to support their onboarding process to the CCP.

4. Onboarding Guides:

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