

Registering a Business on the CARM Client Portal (CCP) and Delegations

[CCP Registration Log in](#)

1	<p>Identify your Business Account Manager (BAM)</p> <p>The Business Account Manager is responsible for all activities associated to the management of the business account in the CARM Client Portal. The first individual who links their user account to the business automatically becomes a BAM.</p> <p>This user role should be held by an individual with active involvement in the management of its business account and has access to business information (i.e., legal name, finances)</p>
2	<p>Log on to the CARM Client Portal using one of the sign in options</p> <p>After registration is complete this sign in will be used by the user to access the CCP so the method chosen must remain consistent.</p> <p><u>Option 1: Sign in Partner</u></p> <ul style="list-style-type: none"> -Authentication process that allows an individual access to Government of Canada online portal accounts -Uses your personal bank sign in. All banking information is secure. Does not link bank info to Portal. <p><u>Option 2: GCKey</u></p> <ul style="list-style-type: none"> -Can use an existing GCKey for other CBSA portals, or create a new GCKey <p>The BAM will be prompted to register their email address for Multi-Factor Authentication (MFA). This email address will receive a one-time password required to complete the log in.</p> <p>TIP: A unique log in must be used for each Business entity (BN9)</p>
3	<p>Create a user profile for the CCP</p> <p>Complete the required fields:</p> <ul style="list-style-type: none"> -Name, company email address, phone number, and three security questions. <p>TIP: The personal profile will identify the user in the CCP.</p>

4	<p>Identify the Business Number (BN9) and Import Program account identifier (e.g., RM0001)</p> <p>The import account number can be found on CBSA related documents (invoice from broker, B3 Canada Customs Coding form, Daily Notice, B2 Adjustment Request).</p> <p>TIP: If your business has additional RM identifiers choose one active account for registration purposes, other accounts will be linked in the process.</p> <p>BN9 (9 digits): _____ RM (4 digit): _____</p>
5	<p>Enter legal business Information</p> <p>This information must match exactly to CBSA record (this includes spaces, punctuation, abbreviations, upper and lower case)</p> <ul style="list-style-type: none"> -Legal entity name of the business -Full legal physical or mailing address of the business <p>May be found on CBSA related documents, such as notices, Detailed Adjustment Statement (DAS) or business registration documents.</p> <p>TIP: The program will lock you out after 10 error messages throughout the registration process. Contact your provider or CBSA help line after 7 attempts for assistance.</p>
6	<p>Answer financial affinity questions</p> <p>Your transactional information can be found on your B3, Daily Notices and Statement of Account or your customs broker will be able to assist you with these questions.</p> <p>TIP: Dollar values should be entered without commas or other symbols (1234.56).</p> <p>Choose 2 out of 3 questions to answer.</p> <ol style="list-style-type: none"> 1) The total amount of duties and taxes for an import accounting transaction accepted by the CBSA from 2016-10-25 to current. <ul style="list-style-type: none"> - Provide a 14-digit transaction number with no punctuation or hyphen (e.g. 12345123456789) - Zero dollar (0.00) amounts are accepted 2) Provide an exact amount of a payment that has been applied to your account since 2016-10-25. <ul style="list-style-type: none"> - Provide date in MM/YYYY format - Enter the payment amount on the chosen date. (0.00 not accepted)

	<p>3) Balance of a Statement of Account (SOA) back to 2016-10-25.</p> <ul style="list-style-type: none"> - Provide date in MM/YYYY format - Enter Statement of Account Balance for chosen date. (0.00 not accepted) <p>Proceed to confirm your account information. This is the last step before you will have access to your account in the CCP.</p> <p>*If you are not successful, contact the CBSA CARM Client Support Helpdesk. See below for contact information.</p>
7	<p>Accept Business relationship requests from your customs broker/brokers</p> <p>Click 'Manage Pending third party requests'.</p> <p>The BAM should see an access request from your broker. If so, click confirm. If not, contact your broker to request access.</p> <p>If Cole is your primary customs broker, we request:</p> <ul style="list-style-type: none"> - Select All Programs; drop down menu select business management - Under Transaction Visibility Rules click all three boxes <p>Click next and approve.</p>
8	<p>Second BAM to request access in the CCP</p> <p>It is highly recommended to assign more than one Business Account Manager in case of an absence or sign in issues.</p> <p>The second assigned BAM will perform steps 2 & 3</p> <p>When they are prompted with the first-time user screen:</p> <ul style="list-style-type: none"> - Request access to my employer - Enter the business number (BN9) - Request access - Comment: Request access to account <p>The access request will show pending until approved by the first BAM</p>

9

Approve the second BAM access to CCP

Log in to the portal

- 'Manage pending employee requests'
- View access requests
- Review and approve the user as Business Account Manager

Once approved, the second user will be able to sign in and be a fully functioning BAM.

TIP: There is no limit to the number of BAMs (or other roles) assigned on an account.