

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

[CCP Registration Log in](#)

1	<p><b>Identify your Business Account Manager (BAM)</b></p> <p>The Business Account Manager is responsible for all activities associated to the management of the business account in the CARM Client Portal. <b>The first individual who links their user account to the business automatically becomes a BAM.</b></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><b>Log on to the CARM Client Portal using one of the sign in options</b></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"> <li>-Authentication process that allows an individual access to Government of Canada online portal accounts</li> <li>-Uses your <b>personal</b> bank sign in. All banking information is secure. Does not link bank info to Portal.</li> </ul> <p><u>Option 2: GCKey</u></p> <ul style="list-style-type: none"> <li>-Can use an existing GCKey for other CBSA portals, or create a new GCKey</li> </ul> <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><b>TIP:</b> A unique log in must be used for each Business entity (BN9)</p>
3	<p><b>Create a user profile for the CCP</b></p> <p>Complete the required fields:</p> <ul style="list-style-type: none"> <li>-Name, company email address, phone number, and three security questions.</li> </ul> <p><b>TIP:</b> The personal profile will identify the user in the CCP.</p>

<p><b>4</b></p>	<p><b>Identify the Business Number (BN9) and Import Program account identifier (e.g., RM0001)</b></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><b>TIP:</b> 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>
<p><b>5</b></p>	<p><b>Enter legal business Information</b></p> <p>This information <b>must match exactly</b> to CBSA record (this includes spaces, punctuation, abbreviations, upper and lower case)</p> <ul style="list-style-type: none"> <li>-Legal entity name of the business</li> <li>-Full legal physical or mailing address of the business</li> </ul> <p>May be found on CBSA related documents, such as notices, Detailed Adjustment Statement (DAS) or business registration documents.</p> <p><b>TIP:</b> The program will lock you out after 10 error messages throughout the registration process. Contact your provider or CBSA help line after <b>7 attempts</b> for assistance.</p>
<p><b>6</b></p>	<p><b>Answer financial affinity questions</b></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><b>TIP:</b> 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"> <li>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"> <li>- Provide a 14-digit transaction number with no punctuation or hyphen (e.g. 12345123456789)</li> <li>- Zero dollar (0.00) amounts are accepted</li> </ul> </li> <li>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"> <li>- Provide date in MM/YYYY format</li> <li>- Enter the payment amount on the chosen date. (0.00 <b>not</b> accepted)</li> </ul> </li> </ol>

	<p>3) Balance of a Statement of Account (SOA) back to 2016-10-25.</p> <ul style="list-style-type: none"> <li>- Provide date in MM/YYYY format</li> <li>- Enter Statement of Account Balance for chosen date. (0.00 <b>not</b> accepted)</li> </ul> <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>
<b>7</b>	<p><b>Accept Business relationship requests from your customs broker/brokers</b></p> <p>Click '<b>Manage Pending third party requests</b>'.</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"> <li>- Select <b>All Programs</b>; drop down menu select <b>business management</b></li> <li>- Under <b>Transaction Visibility Rules</b> click all three boxes</li> </ul> <p>Click next and approve.</p>
<b>8</b>	<p><b>Second BAM to request access in the CCP</b></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 &amp; 3</p> <p>When they are prompted with the first-time user screen:</p> <ul style="list-style-type: none"> <li>- Request access to my employer</li> <li>- Enter the business number (BN9)</li> <li>- Request access</li> <li>- Comment: Request access to account</li> </ul> <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.