

CARM Client Portal Setup Guide

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& 5. Request access to my employer**

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4. Register my business

1) Input the business information

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

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)

Search

Register my business

manager who wants to use the commercial 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
- Register my 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.

Register my business

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

1. 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 (99999999) (required)

Business number

* Importer program reference number (RM1234) (required)

RM

I, Liyu 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)

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2. 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.

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Business linking requirements

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. It is a 15-digit number assigned by the Canada Revenue Agency (CRA), made up of the 9-digit business number followed by a 6-digit alphanumeric number used to identify the business import-export account (e.g., 123456789RM0001).

An example of a Business Number RM account

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

To find out how to register for both a business number and an import/export program account, go to [how to register for a business number or Canada Revenue Agency program accounts](#). If you are a Non-Resident, please contact your designated Non-Resident Tax Services Office.

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

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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
12345678

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

TSP Custom Brokers

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).

PO box/R

* Address Line 1 (required)

Address Line 2

* Country (required)

Province/State

* City (required)

Postal/Zip Code

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4. Register my business

2) Answer the security questions

You will need to answer one or more questions about your account. Do not use dollar signs or commas.

3. Select the question(s) you will answer from the pull down menu(s) provided.

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

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* See below for examples of each of these three questions and how to answer them.

1) 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 SCA

2) 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 SCA

4. 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: 123456158
Legal entity name: T&P Customs 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: 1-800-401-9999

Program Account Numbers
123456158RM0001
123456158RM0002
123456158RM0003

Previous Confirm

3) 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.

Transaction number (required)

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)**
12155638821212

*** Total amount of duties and taxes (required)**
-8876.00 SCA

5. Request access to my employer

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

The screenshot shows the 'First time setup' page with two main sections. The left section is titled 'Request access to my employer' and contains the text: '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) Search'. The right section is titled 'Register my business' and contains the text: 'Are you a **manager** who wants to use the commercial 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**
 - This option is intended for employees who wish to request access to a business account that is already registered on the portal.
- **Register my business**

Request access to my employer

1. 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' form. The form contains the following fields and text: '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) Search', 'Found match: Business operating/trade name: Importer/Company1732', 'Specify why you need access: Comments (maximum 256 characters) (required) This field is required.', and a 'Request Access' button.

*The BAM who set up the business account will approve the access and delegation of authority by navigating to the “**Manage pending employee requests**” approve the request and setting the level of authority.