

# HOW TO SETUP YOUR CARM PORTATION

#### WHAT IS CARM?

BEFORE MAY 2022 ALL IMPORTERS HAD THE OPTION TO PAY CUSTOMS BROKERS FOR THEIR DUTIES & TAXES

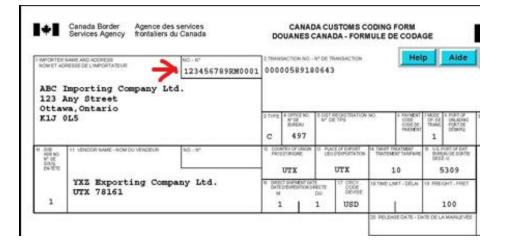
#### AFTER MAY 2022

ALL IMPORTERS WILL PAY THE GOVERNMENT (RECEIVER GENERAL FOR CANADA) DIRECTLY FOR THEIR DUTIES & TAXES AT THE END OF EACH MONTH VIA ONLINE BANKING OR YOUR CARM PORTAL



CARM STANDS FOR THE "CBSA ASSESSMENT AND REVENUE MANAGEMENT" WHICH IS A MULTI-YEAR INITIATIVE THAT WILL TRANSFORM THE COLLECTION OF DUTIES AND TAXES FOR GOODS IMPORTED INTO CANADA

#### STEP 1: LOCATE YOUR BUSINESS NUMBER



Your BN# is a 9-digit number supplied by canada revenue agency. It looks like this:

#### "123456789" RM0001



#### STEP 2: GO TO THE CARM PORTAL WEBSITE

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|   | Home DRM Classificated   |   |  |               |   |
|   | Access the CARM O  | Client Portal   |  |               |   |
|   | Choose from one to two option  | no to accese the CARM Client Portal   |  |               |   |
|   | Option 1<br>Galleer kligele Poten<br>• Oze Se same sign-internat<br>banning.   | feer year use for other celling services (fo  | warps colore   |               |   |
|   | eccount. The second person in<br>account.<br>• Name of your influencetion (for<br>In Partner will not know which   | nt, only size of the two-people can regist<br>surpluse a different: Signilin Pertner accor-<br>ecomple, filancial, bening J will be shar<br>government actics you are using   | et or trade a COlley                                       |               |   |
|   | <ul> <li>You will remperarily leave the</li> <li>Were the of Sign-In Parishers</li> </ul>  | CISA Me to use your Sign in Permer.   |  |               |   |
|   | <ul> <li>Register for a DONey user ID a</li> <li>Nov: SCRey user ID can be an<br/>agencies, doney user ID can be and<br/>agencies, doney user IDs creat</li> </ul> | ind password Eyou do not also one of the<br>mit persected Eyou do not also one one,<br>ed to access offer Oscentreast of Canad<br>red on other Network government at the c<br>ing GOOg user (Diyou all need to create | a departments and<br>in the used on CBDA.                  |               |   |
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|   |  |   |  |               |   |

#### YOU CAN GOOGLE "CBSA CARM PORTAL"

#### STEP 3: CHOOSE YOUR SIGN IN PARTNER

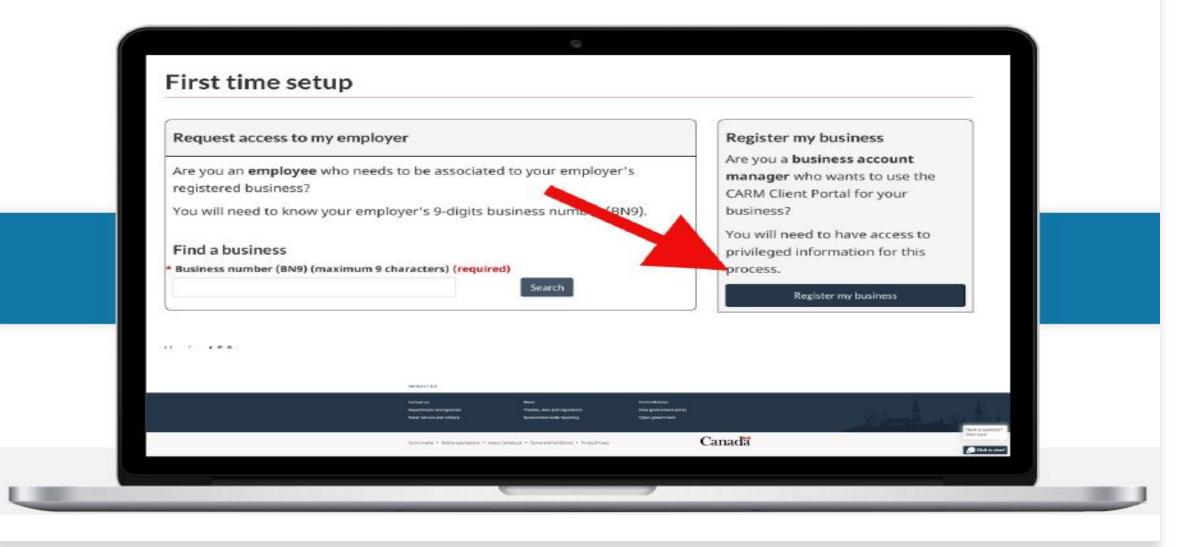
For verification purposes only as you can use your personal account



#### STEP 4: CREATE YOUR PERSONAL PROFILE

| Your contact details will be used to co                          | mmunicate important   | updates.   |   |                |  |
|--|---|--|---|----------------|--|
| User information<br>* First Name (required)                      |   |  |   |                |  |
| * Last Name (required)   |   |  |   |                |  |
| Contact Information  * Telephone number(including area code) (re | quired)   |  |   |                |  |
| Extension  |   |  |   |                |  |
| Email address (required)     Confirm e-mail address (required)   |   |  |   |                |  |
|  | WEDON LAS   |  |   |                |  |
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|  | Socialmedia + Nociale applications - A                              | out Gradual + Terreland conditions + PrivacyPrivacy            | Canada  | Children       |  |

#### STEP 5: CHOOSE REGISTER MY BUSINESS



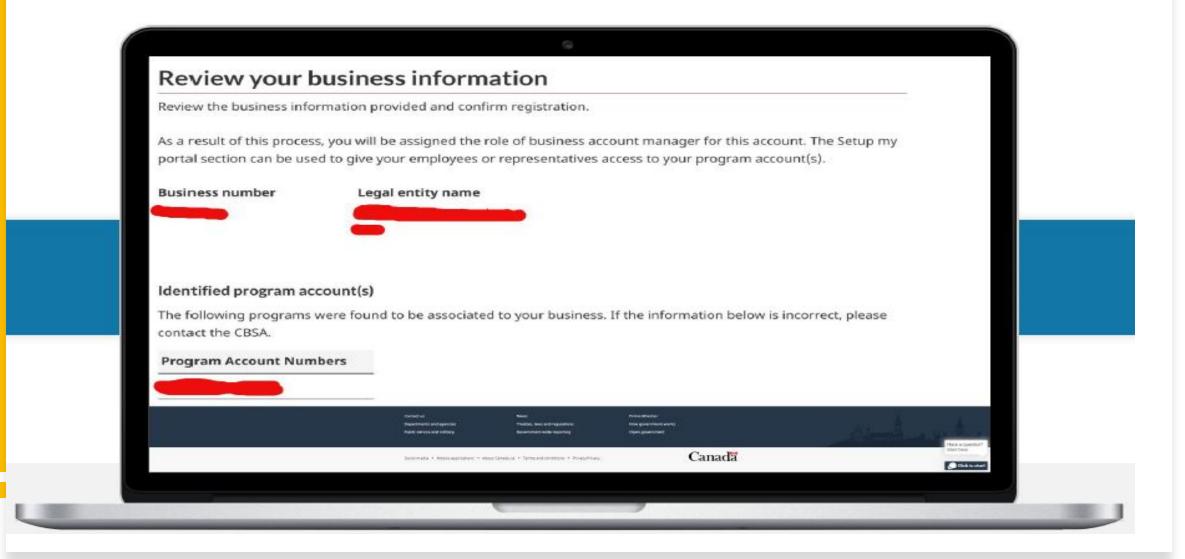
# STEP 6: ENTER YOUR COMPANY BUSINESS NUMBER

| * Business number (999999  | 999) (required  |         |                            |                       |  |
|----------------------------|---|---------|----------------------------|-----------------------|--|
| 123456789                  |   |         |                            |                       |  |
| * Importer program referen | nce number (RMn234) (red                                | guired) |                            |                       |  |
| RM 0001                    |   |         |                            |                       |  |
|                            |   |         |                            |                       |  |
| I Graham Pobins continu    |   |         |                            |                       |  |
|                            | that I am hereby authorize<br>anada Border Services Age |         | of the business to conduct |                       |  |
|                            | that I am hereby authorize<br>anada Border Services Age |         | of the business to conduct |                       |  |
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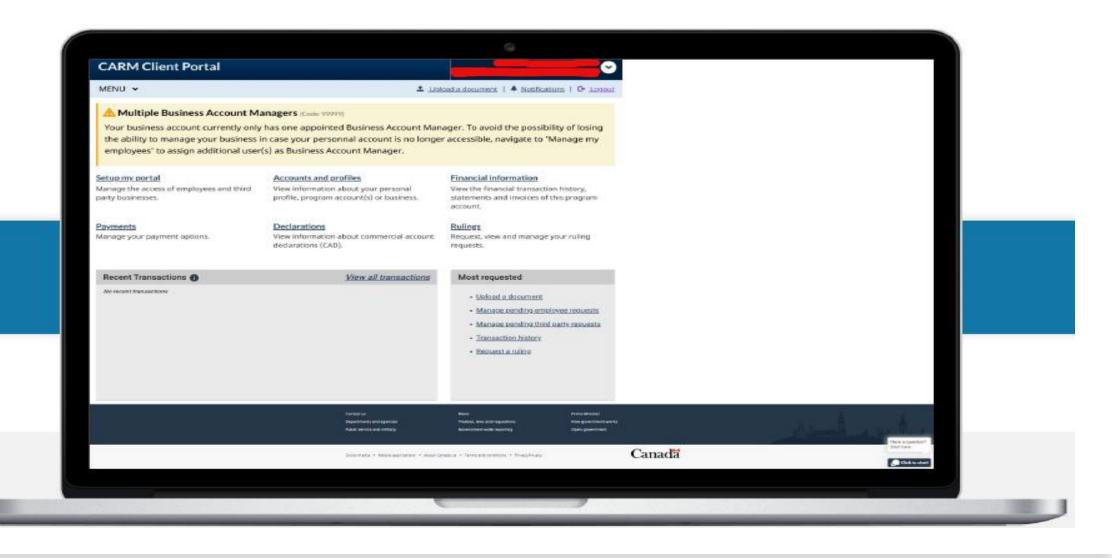
# STEP 7: VALIDATE YOUR BUSINESS NUMBER

| Validate your busines   | information   |   |   |  |   |
|---|---|---|---|--|---|
| Fill in the fields below to validate your b<br>entity name for your business.       | usiness. If you encounter er                                | rrors, make sure you hav  | e entered the exact legal                                       |  |   |
| If you are a sole proprietor, use your pe<br>the legal corporate name of your busin | rsonal legal name (for exam<br>ess (for example, ABC Incorp | nple, Jane Doe). In all oth<br>porated].                          | ner scenarios, you should use                                   |  |   |
| Business number   |   |   |   |  |   |
| * Legal entity name (max. 175 characters) (requ                                     |   |   |   |  |   |
|   | Ξ   |   |   |  |   |
| Longl optity address datalla  |   |   |   |  |   |
| Legal entity address details<br>Enter the information from one of the a             | ddresses (physical mailing                                  | or books and records) n   | rouided to the CRA when you                                     |  |   |
| choer the mornauon nom one of the a   | duresses (priysical, malling                                | or books and records) p   | toviaca to the cros when you                                    |  |   |
| registered your business.   |   |   |   |  |   |
|   |   |   |   |  |   |
| Address Line 1 (required)   |   |   |   |  |   |
|   |   |   |   |  |   |
|   |   |   |   |  |   |
| * Address Line 1 (required)   |   |   |   |  |   |
| * Address Line 1 (required)   |   |   |   |  |   |
| Address Line 1 (required)  Address Line 2   |   |   |   |  |   |
| Address Line 1 (required)  Address Line 2   |   |   |   |  |   |
| * Address Line 1 (required)<br>Address Line 2<br>P.O box/R.R                        | tankat wi   | Neg   | Protectionage/  |  |   |
| * Address Line 1 (required)<br>Address Line 2<br>P.O box/R.R                        |   |   |   | Acres 1  |   |
| * Address Line 1 (required)<br>Address Line 2<br>P.O box/R.R                        | tariad ul<br>Department anciegences                         | Napel<br>Taution, lang and regulations                            | Promo Minestari<br>Nice generaturati work2<br>olgani powentmett | A demand in the second se | Here a question   |
| * Address Line 1 (required)<br>Address Line 2<br>P.O box/R.R                        | Special sol<br>Specialization<br>Rada: service and detainy  | Napel<br>Taution, lang and regulations                            | Press director<br>Film genetiment and L                         | A Anna A   | There a concernor |
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#### STEP 8: REVIEW YOUR BUSINESS INFORMATION



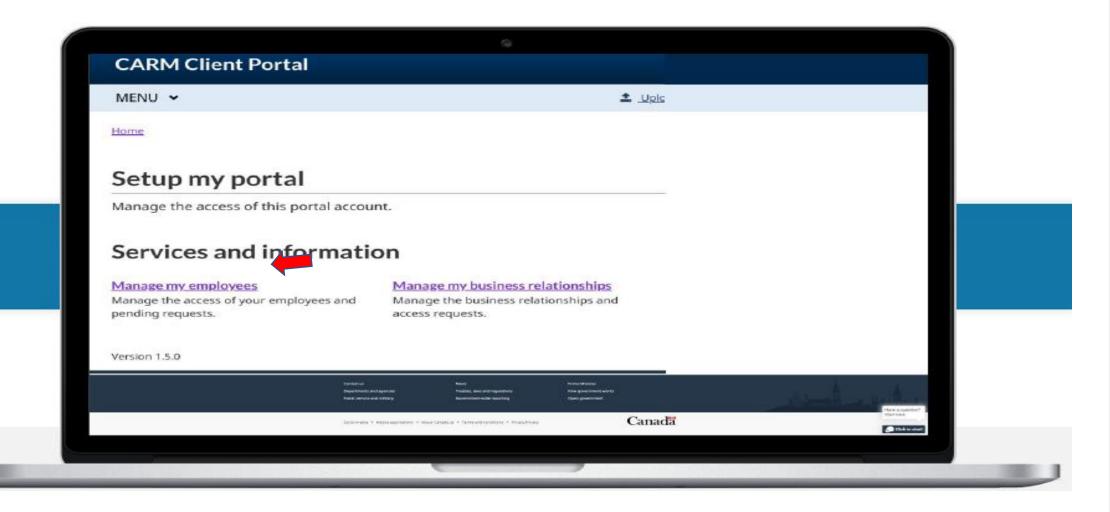
# STEP 9: CONGRATULATIONS!! YOUR PORTAL IS ACTIVATED!!



## STEP 10: CLICK THE LINK "SETUP MY PORTAL"

| CARM Client Portal   |   |  | <b>S</b> |          |               |
|--|---|--|----------|----------|---------------|
| MENU 👻   | ± 30  | cadia.document   🛎 Notifications   🕞 Lo  | tuce     |          |               |
|  | has one appointed Business Account Man<br>n case your personnal account is no longe                       |  |          |          |               |
| Setup my portal<br>Manage the access of employees and third<br>party businesses. | Accounts and profiles<br>View information about your personal<br>profile, program account(s) or business. | Financial information<br>View the financial transaction history,<br>statements and invoices of this program<br>account.                        |          |          |               |
| <u>Payments</u><br>Monage your payment options.                                  | Declarations<br>View information about commercial account<br>declarations (CAD).                          | Rulings<br>Request, view and manage your ruling<br>requests.   |          |          |               |
| Recent Transactions ()   | View all transactions   | Most requested   |          |          |               |
| All record transitions   |   | Stokaad a document     Manage, conding employee resuents     Manage, conding study out y concents     Transaction history     Becumit a ruling |          |          |               |
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# STEP 11: CLICK "MANAGE MY EMPLOYEES" TO ADD APCB AS YOUR BROKER



# STEP 12: CLICK : RECEIVED REQUESTS"

| ARM Clie             | nt Portal                      |  |  |                                |
|----------------------|--------------------------------|--|--|--------------------------------|
| ENU 🗸                |                                | ± Upload a docum   | ent   🛎 Notifications   🕒 Logaut                           |                                |
| me > <u>Setup my</u> | Portal                         |  |  |                                |
|                      |                                |  |  |                                |
|                      | ousiness relation              |  |  |                                |
| nage the bus         | iness relationships and access | requests.  |  |                                |
| eturn to home das    | hboard                         |  |  |                                |
| Manage relations     | hips Received requests 1       |  |  |                                |
| ist of business r    | elationships                   |  |  |                                |
| Search               |                                |  |  |                                |
| <b>C</b> 1-1-1-1     | Business name                  | A  | Actions  |                                |
| Status               | Business name                  | Access Type  | Actions  |                                |
|                      |                                |  |  |                                |
|                      |                                |  |  |                                |
|                      |                                | No rows to show:   |  |                                |
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|                      |                                |  |  |                                |
|                      |                                |  |  |                                |

# STEP 13: CLICK "APPROVE" APCB

| CARM Client Portal                   |  |  |              |                   |
|--------------------------------------|--|--|--------------|-------------------|
| MENU V                               | 1  | Uoload a document   + Notification   | s   G Logout |                   |
| Home · Setup my Portal               |  |  |              |                   |
|                                      |  |  |              |                   |
| Manage business rela                 |  |  |              |                   |
| Manage the business relationships an | id access requests.                                      |  |              |                   |
| Return to home dashboard             |  |  |              |                   |
| Manage relationships Received reques | sts 🚺  |  |              |                   |
| Pending third party access requests  |  |  |              |                   |
| Search                               |  |  | ~            |                   |
| Status Business name                 | Request date   | Actions  |              |                   |
| Pending Atlantic Pacific Customs B   | rokers Inc. (758400139) 2021-09-28                       | Details Appro-   | Report       |                   |
|                                      |  |  |              |                   |
|                                      |  |  |              |                   |
|                                      | WEBSY FAIL   |  |              |                   |
|                                      |  | Prote-Minister<br>Is introgrammer More government -<br>trade-rooting Dyan government |              | An A when         |
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|                                      |  |  |              |                   |

# Step 14: Click Select access to "specific programs" Then select "program management"

| O All Programs     |  |                      |      |
|--------------------|--|----------------------|------|
| Specific program   | is definition  |                      |      |
| Program name       | Account number (RM)                                      | Access               |      |
| -                  |  |                      |      |
|                    | RM0001   | Program management - |      |
| Transaction visibi | ility rules 🕦<br>Iantic Pacific Customs Brokers Inc. (75 |                      |      |
|                    | ility rules 🚯  |                      | Ε. A |

# STEP 15: PREVIEW AND CLICK "APPROVE" ACCESS DETAILS

| Preview access det                             | ails         |             |                       |           |                 |          |                    |          |                   |              |                   |                       |  |
|--|--------------|-------------|-----------------------|-----------|-----------------|----------|--------------------|----------|-------------------|--------------|-------------------|-----------------------|--|
|  | Organization | User access | Business relationship | Documents | Program         | Finances | Financial security | Payments | Pre-authorization | Declarations | Rulings & Appeals |                       |  |
| Business Management                            | ×            | ×           |                       |           |                 |          |                    |          |                   |              |                   |                       |  |
| (758400139)                                    | ×            | 1           | ۲                     | 1         | ۲               | 1        | 1                  | 1        | ×                 | 1            | 1                 |                       |  |
| Legend<br>X No access<br>④ Read-only<br>✓ Edit |              |             |                       |           |                 |          |                    |          |                   |              |                   |                       |  |
|  |              |             |                       | 1         | 401183          |          |                    | -        |                   |              |                   |                       |  |
|  |              |             |                       |           | pertment) and a |          |                    |          | -                 |              |                   | tere generated websit |  |
|  |              |             |                       |           |                 |          |                    |          |                   | 001 7 2040   | del accor         | Canada                |  |

## STEP 16: CONGRATULATIONS!! YOUR BROKER IS NOW ACTIVE

| Manage the busine     | ss relationships and access requests.                         |  |   |        |
|-----------------------|---|--|---|--------|
| Return to home dashbo | ard   |  |   |        |
| Manage relationships  | Received requests   |  |   |        |
| List of business rela | tionships   |  |   |        |
| Search                |   |  | ~   |        |
| Status                | Business name   | Access Type  | Actions   |        |
| Active                | Atlantic Pacific Customs Brokers Inc. (758400                 | 139) Program management  | eee<br>Detaits  |        |
|                       |   |  |   |        |
|                       | 19/2017 8.8   |  |   |        |
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FOR MORE INFORMATION OR HELP CONTACT CARM.SUPPORT@APCB.CA