## **CARM Client Portal Journey**

BN: Business Number BAM: Business Account Manager PAM: Program Account Manager SOA: Statement of Account



- > Managing portal
- > Managing SOA
- > Final accounting to CBSA
- > Bond management
- CBSA payment
- > Do you contract with more than one broker?
- > Will you use a broker for release only?
- Will your broker remit payment for transactions they account for or will payment be remitted directly? Do you have an option?

## Broker P/BAM requests broker access to Importer BAM through Portal

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Identify user roles and relationship within company (PAM, Editor, Reader)

> Request is per BN15 number

## Upon approval, broker assigns roles as identified (each user must obtain their own GC Key)

- > What is the process if employee leaves?
- > What is the process is client leaves?

Importer and broker to work together to define roles and responsibilities and document in broker rules

## **User Permissions**

- 1. Organization
- 2. User Access
- 3. User Access
- 4. Upload Documents
- 5. Program
- 6. Finances
- 7. Financial security
- 8. Payments
- 9. Pre Authorized Debit
- 10. Declarations
- 11. Rulings and Appeals

