



# CARM Client Portal

## User Guide

Convert a pre-CARM B3 to a  
Commercial Accounting Declaration

# Table of contents

Purpose of this guide.....	3
Audience.....	3
Preamble.....	3
Contact .....	3
1. Convert the B3 to a Commercial Accounting Declaration .....	4
2. Submit an adjustment request after conversion .....	14

## Purpose of this guide

This guide explains how to convert a pre-CARM transaction (the B3 Canada Customs Coding Form) to a Commercial Accounting Declaration.

## Audience

This guide is intended for:

- importers
- customs brokers who have delegated authority to act on behalf of an importer
- third parties such as trade consultants, lawyers and accountants who have delegated authority to act on behalf of an importer

## Preamble

Declarations made using the B3 form (Canada Customs Coding Form) need to be converted to a Commercial Accounting Declaration before you can submit an adjustment request. Even if you only need to adjust one line of the original B3, you must first convert all of the lines to a Commercial Accounting Declaration.

The information you are submitting must represent the most current information the CBSA has. You will need the original B3 form and any adjustments the CBSA has processed, such as B2 adjustments, blanket adjustments, Detailed Adjustment Statements (DAS) and drawback claims.

Once the B3 has been converted to a Commercial Accounting Declaration and validated, you will be able to submit a request for an adjustment or appeal an adjustment decision.

## Contact

Contact the [CARM Client Support Helpdesk](#) if you need additional support.

# 1. Convert the B3 to a Commercial Accounting Declaration

1. From the homepage (or the Menu), go to **Declarations** → **List of submitted declarations** and click on **Adjust a pre-CARM B3**.

## List of submitted declarations

View your submitted Commercial Accounting Declarations (CAD), mass adjustments, records of intent, duty drawbacks and temporary importations.

[▶ What can I do here?](#)

### I want to...

<a href="#">Adjust a pre-CARM B3</a> Pre-CARM B3's must be converted to CAD before they are adjusted.	<a href="#">Create a drawback request</a> To create a new duty drawback request on one or more CAD's.	<a href="#">Create a mass adjustment</a> To create a new mass adjustment on multiple CAD's.
<a href="#">Create pre-CARM drawback request</a> To create a new duty drawback request on a pre-CARM B3.	<a href="#">Request duty drawback via file upload</a> To create a duty drawback request using the duty drawback XML file template.	<a href="#">Generate mass adjustment case number for EDI or API submission</a> To submit a mass adjustment via EDI or API, a case number must be generated to attach to your EDI or API submissions.

2. Type the B3 transaction number into the **Search for B3** field. Click **Next**.

## Convert B3 to CAD

Converting your B3 to a Commercial Accounting Declaration (CAD) is a necessary step allowing you proceed with adjustments and any other actions on B3s. This conversion step is a statistical entry and will have no financial impact.

To begin this process, search for the B3 to be converted to a CAD.

Note: You can exit the B3 conversion process at any time by selecting the 'save progress' button at the bottom of the page. To resume your conversion, navigate to the list of draft declarations and click the edit button next to the the correct transaction.

\* Search for B3 (required)

[← Previous](#) [Next →](#)

- Review the information in each pre-populated field and update it to the most recent version if it is incorrect. If they are not already pre-populated, complete the required fields, then click **Next**.

### Convert B3 to CAD

Select the type of CAD that the B3 is to be converted to.

**\* Select type of declaration (required)**

AB - With Release

**CBSA office region**

3 - Southern Ontario

**\* CBSA office code (required)**

0427 - Niagara Falls

**CBSA Sub-Office**

Select an option

**Transaction Number (maximum 14 characters)**

310220210519

[← Previous](#) [Next →](#)

- Review the information and click **Start**.

### Convert B3 to CAD

<b>Overview</b>	<b>Review information to start declaration</b>
<b>Status:</b> Draft	<b>Importer</b> Importer B3
<b>Type:</b> AB	<b>BN Number</b> 438971343RM0001
<b>Transaction #:</b> S31V0220210519	<b>Address</b> 737 yate, victoria, , CA, V1V 1V1
<input type="radio"/> Step 1: General Details	<b>Phone number</b> 2508881123
<input type="radio"/> Step 2: Invoices	
<input type="radio"/> Step 3: Review & Submit	

[← Previous](#) [Start](#)

5. Review and fill in any missing information that did not import from the B3. You are encouraged to pay special attention to fields with a red asterisk \* or **(required)** next to them. Click **Next** when you are done.

## Convert B3 to CAD

### Overview

Status: Draft  
Type: AB  
Transaction #: S31V0220210519

Step 1: General Details  
 Step 2: Invoices  
 Step 3: Review & Submit

### Step 1: General Details

\* Mode of transport (required)  
02 - Highway

\* Release date (required)  
2019-08-26

\* Previous transaction number (maximum 14 characters) (required)  
99988877744456

Port of unloading region  
Select an option

Port of unloading  
Select an option

Carrier Code

\* Cargo control number (required)  
DAYR77879

Gross Weight in Kg  
0.000

Freight charges  
0.00

6. You will be brought to the **Invoices & commodities** page where the existing invoices are listed. Click **Edit** to the right of the invoice to go to the Invoice details page.

### Step 2: Invoices & Commodities

[Add invoice](#)

Line #	Invoice #	Vendor name	Actions		
> 1	138	ABC Clothing Inc.	<a href="#">+</a> Commodity	<a href="#">✎</a> Edit	<a href="#">✎</a> Vendor

Items per page:  1 to 1 of 1 [⏪](#) [⏩](#) Page 1 of 1 [⏪](#) [⏩](#)

[← Previous](#) [Save draft](#) [Next →](#)

7. Review the invoice details and fill in any missing information that did not import from the B3. Click **Next** when done.

## Step 2: Invoice details - Invoice

**Add invoice details**

You are required to provide either an invoice number or purchase order number.

**Invoice number**

**Purchase order number**

**US port of exit** ⓘ

**The purchaser is different from the importer.**

The purchaser is different from the importer.

[← Previous](#) [Save progress](#) [Next →](#)



8. Review the vendor details and fill in any missing information that did not import from the B3. Click **Next** when done.

### Step 2: Invoice details - Vendor

Use template to complete section

Select vendor template from list

**\* Vendor Name (required)**

ABC Clothing Inc.

P.O. box/RR

**\* Address (required)**

123 Main Street

**\* City (required)**

Mountain

**\* Country (required)**

United States of America


**\* Province/State (required)**

Texas

**\* Postal/Zip Code (required)**

75101

Telephone number

Save vendor as template 

I wish to save the information to use for future declarations.

[← Previous](#) [Save progress](#) [Next →](#)

9. The **Details of commodity** page will appear. Review and fill in any missing information that did not import from the B3. Remember that the information you are submitting must represent the most current information the CBSA has.

## Step 2: Invoice details - Commodity

### Details of commodity

Use template to complete section

Select commodity template from list

\* **Direct shipment date (required)**

2021-08-04

\* **Classification number (required)**

8537.10.93.00

Help me classify

**Classification description**

Boards, panels, consoles, desks, cabinets and other bases, equipped with two or more apparatus of heading 85.35 or 85.36, for electric control or the distribution of electricity, including those incorporating instruments or apparatus of Chapter 90, and numerical

\* **Narrative description (maximum 132 characters) (required)**

EC-0018: This field is required.

\* **Quantity (required)**

50.00

\* **Unit of measure (required)**

NMB - Number

\* **Value for currency conversion (required)**

4331.50

\* **Currency (required)**

USD - US Dollar

\* **Country of origin (required)**

United States of America

\* **U.S. state (required)**

Iowa

10. Pay particular attention to new fields in the declaration, as you may have entered the information differently on the B3. For example, an Order in Council number, a duties relief licence number and a permit number were all in the same field on a B3. On the Commercial Accounting Declaration, there is a separate field for each.

**\* Value for duty code (required)**

013 - New goods, Vendor and purchaser are not related, Price paid or payable without adjustment

**Ruling number**

**Appeals case number**

**Compliance case number**

**Special Authorities**


**Special authority OIC**


**Special authority duty relief licence**

**Special authority permit**

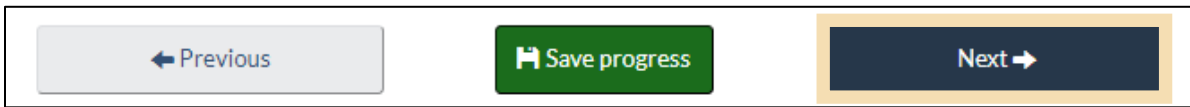
**Time limit type**

Select an option ▼

**Time limit from**  

**Time limit to**  










11. Scroll to the bottom of the page and click on **Next**.



12. You will be taken back to the **Invoices & commodities** page. If the original B3 had more than one line, repeat the above steps for every line. Click on the arrow to the left of the invoice line number, and additional commodity lines will appear. Choose **Edit** to the right of the commodity line number.

### Step 2: Invoices & commodities

[Add invoice](#)

Line #	Invoice #	Vendor name	Actions		
 1	138	ABC Clothing Inc.	 Commodity	 Edit	 Vendor
Comm. line number	Classification number	Narrative description	Actions		
1	8537.10.93.00	description of ...	 Edit		
2	8537.20.00.90	narrative desc...	 Edit		
3	9403.10.00.99	Not Applicable	 Edit		
4	9403.90.00.91	narrative desc...	 Edit		
5	9403.90.00.92	narrative desc...	 Edit		

Items per page:  1 to 1 of 1 [<](#) [>](#) Page 1 of 1 [<](#) [>](#)

13. Once you have reviewed and updated every invoice and commodity line, click **Next**.



**Note:**

The CARM Client Portal will perform a limited validation of the required fields after you click **Next**. It will inform you of any errors at the top of the screen. You will need to correct these before proceeding.

A **Declaration valid** message will appear at the top of the screen if the required fields are accepted. Even if it says **Declaration valid**, the declaration may still be reviewed by the CBSA.

14. Review the information in the **Review & submit** section. Verify that the duties and taxes shown are the amounts you have already paid. They will not be posted to your account again as a result of converting the B3.

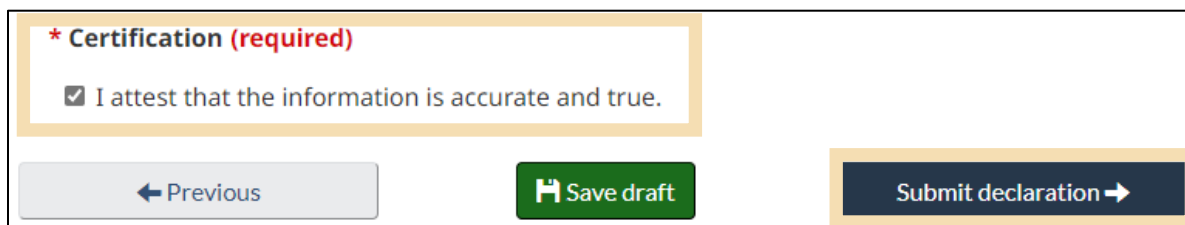
### Step 3: Review & submit

Review the sections you have completed below. If everything is correct you can certify and submit your declaration. Note that the final amount of duties and taxes is not confirmed until it has been processed.

[Edit](#)

<b>Mode of transport</b> 02 - Highway	<b>Port of unloading region</b> 6 - Prairie
<b>Release date</b> 2021-08-05	<b>Port of unloading</b> 0502 - Emerson

15. Scroll down to the **Certification** section. Check the box next to **I attest that the information is accurate and true**. Then click **Submit declaration**.

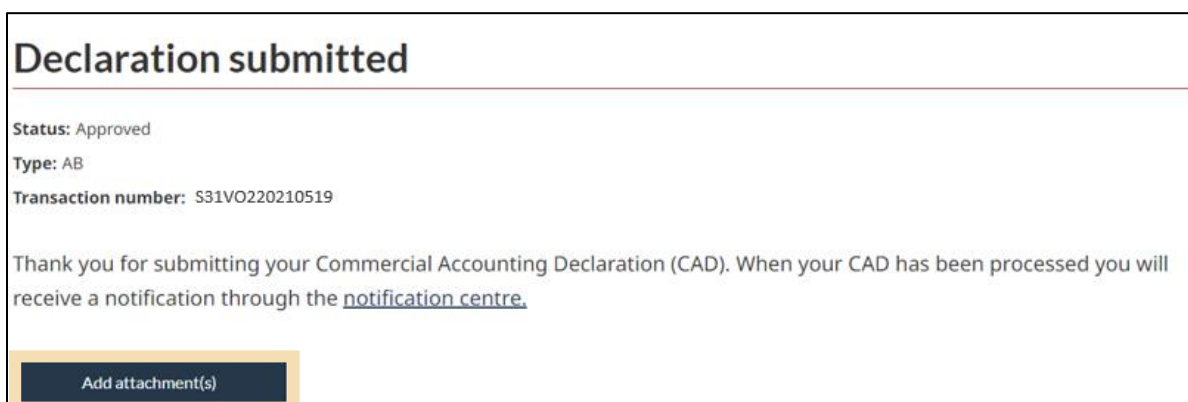


\* **Certification (required)**

I attest that the information is accurate and true.

← Previous      Save draft      Submit declaration →

16. After submitting the declaration, the **Declaration submitted** screen will appear. Click on **Add attachment(s)** if you need to add documents. You can download a version to save or print for your records.



## Declaration submitted

Status: Approved  
Type: AB  
Transaction number: S31VO220210519

Thank you for submitting your Commercial Accounting Declaration (CAD). When your CAD has been processed you will receive a notification through the [notification centre](#).

Add attachment(s)

## 2. Submit an adjustment request after conversion

Once the converted declaration has been accepted, you will be able to submit an adjustment request. This process is included in the CARM Client Portal user guide **Request an of a Commercial Accounting Declaration**.