



Dominion CARM Training Session

**Converting a B3 to a CAD
(Customs Accounting Declaration)**



AGENDA – B3 to CAD Conversion

- Search & confirm the B3 entry
- B3 to CAD Conversion
 - General Details
 - Invoice & commodities
 - Review & submit
- Confirmation of converted file
- Maintenance of Records



Converting a B3 to a CAD

Why do we need to convert a B3 to a CAD?

After October 21, 2024, when the CARM 3 portal goes live, only claims submitted through the portal will be processed by CBSA.

There are exceptions for Mass Adjustments and Drawbacks.



Converting a B3 to a CAD

In the CCP, navigate to **List of Submitted Declarations** page;
Home page > Declarations > List of submitted declarations

Services and information

[Duties and taxes calculator](#)

Tool to estimate duties and taxes.

[Create a declaration](#)

Create a declaration; View the list of releases requiring your attention.

[List of submitted declarations](#)

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

[Manage my templates](#)

Manage and view your saved templates for CAD, vendor and goods.

[Statements of adjustment & appeals](#)

View all your statements of adjustment and initiate an appeal for a trade, SIMA or pre-CARM decision.

[Request declaration report](#)

Request a custom report of your declarations (including B3s).

[View list of requested declaration reports](#)

View and manage the list of declaration report requests.



Converting a B3 to a CAD

In the **List of Submitted Declarations** page, select **Convert 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...

Convert a pre-CARM B3

Pre-CARM B3's must be converted to CAD before they are adjusted.

Create pre-CARM drawback request

To create a new duty drawback request on a pre-CARM B3.

Create a drawback request

To create a new duty drawback request on one or more CAD's.

Request duty drawback via file upload

To create a duty drawback request using the duty drawback XML file template.

Create a mass adjustment

To create a new mass adjustment on multiple CAD's.

Generate mass adjustment case number for EDI or API submission

To submit a mass adjustment via EDI or API, a case number must be generated and referenced in your EDI or API submissions.



Converting a B3 to a CAD

In the **Convert B3 to CAD** page, add the original B3 transaction in the **Search for B3** field and click on **Next** ⇒

Convert B3 to CAD

Converting your B3 to a Commercial Accounting Declaration (CAD) is a necessary step allowing you to 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)



Converting a B3 to a CAD

The next page in the **Convert B3 to CAD** function, confirm the following;

- Transaction Number, Type of declaration & CBSA office code
- If all are correct and reflect the most recent version of the entry, click on **Next**.
- If there are any errors or unpopulated fields, make the necessary corrections and click on **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)**

0496 - Toronto - Interport Sufferance Warehouse (Dixie)

CBSA sub-office

Select an option

Transaction Number (maximum 14 characters)

2221366

← Previous

Next →



Converting a B3 to a CAD

The next page confirm all fields and click **Start**

Convert B3 to CAD

Overview	Review information to start declaration	
Status: Draft	Importer	Customs broker
Type: AB	DCC Client Name	DOMINION CUSTOMS CONSULTANTS INC.
Transaction #: 2221366	BN Number	BN Number
<input type="radio"/> Step 1: General details	##### RM0001	101436210
<input type="radio"/> Step 2: Invoices & commodities	Address	Address
<input type="radio"/> Step 3: Review & submit	DCC Client Address	202-1595 16 AVE, RICHMOND HILL, ON, CA, L4B 3N9
	Phone number	Phone number

[← Previous](#) [Start](#)



Converting a B3 to a CAD

Step 1: General Details add the required information only, confirm and click **Next**
Convert B3 to CAD

Overview

Status: Draft
Type: AB
Transaction #: 2221366

Step 1: General details
 Step 2: Invoices & commodities
 Step 3: Review & submit

Step 1: General details

*** Mode of transport (required)**
Select an option

*** Release date (required)**
2022-04-20

Previous transaction number (maximum 14 characters)
[]

Port of unloading region
Select an option

Port of unloading
Select an option

Carrier code
[]

*** Cargo control number (required)**
[]

Gross weight in kg
0

Freight charges
0



Converting a B3 to a CAD

Step 2: Invoice & Commodities select the invoice to be converted and click **Next**

Convert B3 to CAD

Overview

Status: Draft
Type: AB
Transaction #: 2221366

Step 1: General details
 Step 2: Invoices & commodities
 Step 3: Review & submit

Step 2: Invoices & commodities

Add invoice

Line #	Invoice #	Vendor name	Actions
> 1	908111122...	Supplier Name	+ Commodity Vendor
> 2	908111122...	Supplier Name	+ Commodity Vendor

Items per page: 10 1 to 2 of 2 << < Page 1 of 1 > >>

← Previous Save draft Next →



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details Confirm the select the invoice to be converted and click **Next**

Convert B3 to CAD

Overview

Status: Draft
Type: AB
Transaction #: 2221366

- ✔ Step 1: General details
- ✔ Step 2: Invoices & commodities
- Step 3: Review & submit

Step 2: Invoice details - Invoice

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

Invoice number
9081111222136600001

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 →



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details – Vendor

Confirm the vendor name and complete only the required fields and click **Next**

Convert B3 to CAD

Overview

Status: Draft
Type: AB
Transaction #: 2221366

Step 1: General details
 Step 2: Invoices & commodities
 Step 3: Review & submit

Step 2: Invoice details - Vendor

Use template to complete section
Select vendor template from list

* Vendor name (required)
Vendor Name

P.O. box/RR

* Address (required)
Supplier street address

* City (required)
Supplier city name

* Country (required)
Select an option

Postal/Zip code

Telephone number

Save vendor as template ⓘ
 I wish to save the information to use for future declarations.

← Previous Save progress Next →



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details – Commodity (screen 1)

Complete only the required fields

Step 2: Invoice details - Commodity

Details of commodity

Use template to complete section

Select commodity template from list

* Direct shipment date (required)

2022-04-15

* Classification number (required)

8536.50.90.90

Help me classify

Classification description

Electrical apparatus for switching or protecting electrical circuits, or for making connections to or in electrical circuits (for example, switches, relays, fuses, surge suppressors, plugs, sockets, lamp-holders and other connectors, junction boxes), for a

* Narrative description (maximum 132 characters) (required)

* Quantity (required)

15

* Unit of measure (required)

NMB - Number

* Value for currency conversion (required)

457.83

* Currency (required)

USD - US Dollar

* Country of origin (required)

Japan

* Place of export (required)

Japan

* Tariff treatment code (required)

002 - Most-Favoured-Nation Tariff



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details – Commodity (screen 2)

Complete only the required fields

Tariff code

Tariff code description

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

Ruling number

Appeals case number

Compliance case number


Special Authorities


Special authority OIC

Special authority duties relief licence

Special authority permit i

Time limit type

Time limit from 

Time limit to 



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details – Commodity (screen 3)

Complete only the required fields

Duties and taxes

Net customs duty

Excise tax code

Net excise tax

Net excise duty

* Value for duty (required)

* Value for tax (required)

GST code

Net GST

GST interest amount

Provincial alcohol tax

Alcohol percent (%)

Provincial tobacco tax



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details – Commodity (screen 4)

Complete only the required fields and click **Next**

Total duties and taxes

Surtax & Safeguard
Surtax subject ⓘ

 Self declare surtax ⓘ
Net surtax

Safeguard subject ⓘ

 Self declare safeguard ⓘ
Net safeguard

SIMA
***SIMA subject (required)** ⓘ
Visit the [Measures in Force](#) webpage for the list of goods that are subject to SIMA.

Save commodity as template ⓘ
 I wish to save the information to use for future declarations.

← Previous

Save progress

Next →



Converting a B3 to a CAD

Step 2: Invoice & Commodities – Invoice details – Commodity

- The previous steps of completing the invoice details for each commodity line are required for each commodity line.
- The additional commodity lines can be viewed by clicking on the “expand” button

Convert B3 to CAD

Overview


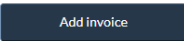
Status: Draft
Type: AB
Transaction #: 2221366

Step 1: General details
Step 2: Invoices & commodities
Step 3: Review & submit

Estimated duties and taxes
\$944.05 CAD

Estimated duties and taxes with interest
\$944.05 CAD

Step 2: Invoices & commodities

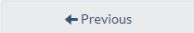

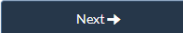
 

Line #	Invoice #	Vendor name	Actions
1	908111122...		+ Commodity Edit Vendor
Commodity line no Classification number Actions			
1	8536.50.90.90		Edit
2	9026.20.00.10		Edit
3	8471.60.00.90		Edit
4	7326.90.90.90		Edit
5	9538.90.70.00		Edit

2 908111122... + Commodity Edit Vendor

Commodity line no	Classification number	Actions

Items per page: 10 1 to 2 of 2 Page 1 of 1



Converting a B3 to a CAD

Upon completion of the details for the first invoice, you will be returned to **Step 2: Invoices & commodities**. The details for each invoice must be completed.

Overview

Status: Draft
Type: AB
Transaction #: 2221366

- Step 1: General details
- Step 2: Invoices & commodities
- Step 3: Review & submit

Step 2: Invoices & commodities

[Add invoice](#)

Line #	Invoice #	Vendor name	Actions
> 1	908111122...	Supplier Name	+ Commodity ✎ Edit ✎ Vendor
> 2	908111122...	Supplier Name	+ Commodity ✎ Edit ✎ Vendor

When the invoice & commodity details for each invoice have been added click on **Next**



Converting a B3 to a CAD

Step 2: Invoices & commodities

- After completing the details for each invoice, any errors or incomplete fields will appear after **Next** is clicked.
- The errors will need to be resolved before proceeding.
- Understanding the errors and how to resolve was trail & error during testing.
- If you are unable to resolve the errors, a Help Desk ticket may provide some assistance.



Converting a B3 to a CAD

Step 3: Review & submit

Upon correctly completing the details for each invoice, the screen below and next slides should appear. (Screen 1)

Convert B3 to CAD

✔ Declaration valid

Overview

Status: Draft
Type: AB
Transaction #: 2221366

- ✔ Step 1: General details
- ✔ Step 2: Invoices & commodities
- Step 3: Review & submit

Estimated duties and taxes
\$944.05 CAD

Estimated duties and taxes with interest
\$944.05 CAD

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.

General details [Edit](#)

CBSA office 0496 - Toronto - Interport Sufferance Warehouse (Dixie)	Cargo control number 1224553256658
Mode of transport 01 - Air	Gross weight in kg 0
Release date 2022-04-20	Freight charges 0



Converting a B3 to a CAD

Step 3: Review & submit - (Screen 2)

[Add invoice](#)

Invoice details

Filter items

Invoice number	Invoice value	Currency	Actions
9081111222136...	271.32	USD	
9081111222136...	13886.65	USD	

Items per page: 1 to 2 of 2 << < Page 1 of 1 > >>



Converting a B3 to a CAD

Step 3: Review & submit (Screen 3)

- After confirming the details, click on the **Certification** box and **Submit Declaration**.

Estimated declaration duties and taxes		\$944.05 CAD
Value for duty		\$17,840.46 CAD
Filter calculated view :		
Declaration totals		
Type	Amount	Total
Anti-dumping	0.00	0.00
Countervailing	0.00	0.00
Customs duty	0.00	49.55
Excise duties	0.00	0.00
Excise tax	0.00	0.00
GST	0.00	894.50
PST/HST	0.00	0.00
Provincial alcohol tax	0.00	0.00
Provincial cannabis excise duty	0.00	0.00
Provincial tobacco tax	0.00	0.00
Safeguard	0.00	0.00
Surtax	0.00	0.00
Total	0.00	944.05

* Certification (required)
 I attest that the information is accurate and true.

← Previous Save draft **Submit declaration →**



Converting a B3 to a CAD

Declaration Submitted

This is your confirmation that the B3 was successfully converted to a CAD.

Declaration submitted

Status: Approved
Type: AB
Transaction number: . 21366

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)

Estimated declaration duties and taxes			\$944.05 CAD
Value for duty			\$17,840.46 CAD
Filter calculated view :			
Declaration totals ▾			
Type	Amount	Remission	Total
Anti-dumping	0.00	0.00	0.00
Countervailing	0.00	0.00	0.00
Customs duty	0.00	0.00	49.55
Excise duties	0.00	0.00	0.00
Excise tax	0.00	0.00	0.00
GST	0.00	0.00	894.50
PST/HST	0.00	0.00	0.00
Provincial alcohol tax	0.00	0.00	0.00
Provincial cannabis excise duty	0.00	0.00	0.00
Provincial tobacco tax	0.00	0.00	0.00
Safeguard	0.00	0.00	0.00
Surtax	0.00	0.00	0.00
Total duties and taxes			944.05
Total interest			0.00
Total relief			0.00
Total duties and taxes with interest and relief			944.05



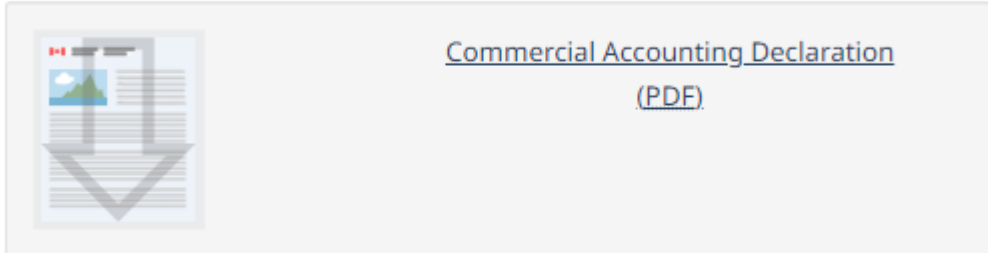
Converting a B3 to a CAD

Declaration Submitted

- The CAD can be downloaded and printed.
- This step is not necessary as it will be available in the CCP.
- Any documents uploaded to the CCP will not be available after uploading and should be maintained by the import or service provider.

Download and print

Optional: Download a PDF version of the CAD to save, or print for your records.



[← Back to list of declarations](#)



Converting a B3 to a CAD

Declaration Submitted

- The CAD should now be listed on the **List of submitted declarations**.
- The CAD can now be adjusted.

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...

[Convert a pre-CARM B3](#)

Pre-CARM B3's must be converted to CAD before they are adjusted.

[Create pre-CARM drawback request](#)

To create a new duty drawback request on a pre-CARM B3.

[Create a drawback request](#)

To create a new duty drawback request on one or more CAD's.

[Request duty drawback via file upload](#)

To create a duty drawback request using the duty drawback XML file template.

[Create a mass adjustment](#)

To create a new mass adjustment on multiple CAD's.

[Generate mass adjustment case number for EDI or API submission](#)

To submit a mass adjustment via EDI or API, a case number must be generated and referenced in your EDI or API submissions.

Declarations	Mass Adjustments	Temporary Imports	Duty Drawbacks	Record of Intent	
Advanced search					
Date range Past 90 days					
Transaction number	Accounting date	Payment due date	Status	For typ	Actions
2221366	2022-05-05	2022-05-31	Approved	AB	



Maintenance of Records

- The CARM portal was not designed to and does not provide for the maintenance of records.
- The only documents that a portal user will be able to access, and download are the files posted on the portal by CBSA such as rulings, assessments and decisions.
- Importers will be required to maintain their own records in accordance with section 2(1) of the *Imported Goods Records Regulations* and *CBSA memo D11-8-6*.
- Records should be stored for six years in a record repository that can be made available to CBSA upon request.



Maintenance of Records

- An importer will be able to revoke access to their portal account for any employee or Trade Chain Partner.
- Non-resident importers require an agreement to maintain records outside of Canada and provide the signed agreement to CBSA.
- Best Practice will have Trade Chain Partners maintaining a record of any work performed in the CARM portal on behalf of the importer.
- Maintenance of records will be a focus for CBSA enforcement in the not-so-distant future.



Thank You For Viewing

**Converting a B3 to a CAD
(Customs Accounting Declaration)**