

Why Register as a User?

Registering as a user of our websites provides fast and convenient access to our online services.

If you intend to use the Personal Property Securities Register (PPSR), either for searching or registering security interests you must be a Registered User.

Some features of your online customer account include:

- Set up User Web Preferences to manage the way you search or register when using the PPSR.
- Have the option to pay either by Direct Debit or Credit Card.
- Access electronic copies of your monthly invoices (Direct Debit customers only).
- Determine the levels of access Users have to online services.

Once you have registered as a customer with the PPSR, you can use the same User ID to access our other participating websites. If you are a casual User of our other websites you are able to use most of the online services without getting a User ID but when you encounter any fee paying services you will need to pay for these by credit card.

To use the registration services on the PPSR you will also need to establish a Secured Party Group (SPG). For information on Secured Party Groups, including training materials on establishing and maintaining SPGs, visit the **Information Library** section of the PPSR website.

Participating Websites

- insolvency.govt.nz | Free phone 0508 INSOLVENCY | 0508 467 658
- companies.govt.nz | Free phone 0508 COMPANIES | 0508 266 726
- societies.govt.nz | Free phone 0508 SOCIETIES | 0508 762 438
- ppsr.govt.nz | Free phone 0508 PPSRINFO | 0508 777 746
- motortraders.govt.nz | Free phone 0508 MOTORTRADERS | 0508 668 678
- iponz.govt.nz | Free phone 0508 4IPONZ | 0508 447 669
- ewr.govt.nz | Free phone 0800 661 000

What Will it Cost?

There are no joining or maintenance fees and you will only be charged for services you use. Payment is made by charging your direct debit account (Registered Users only) or your credit card as you go.

To see what the fees are for using the Companies Office, PPSR and Societies websites please refer to the Fee Schedule in our **Information Library**.

Payment Options

Payment for online services can be made by direct debit or by credit card (Visa, Mastercard, Amex or Diners) - you choose.

A 'Pay Now' screen will identify services that have an associated fee, so you can decide whether or not to proceed.

Direct Debit - Your organisation (or its branches) will receive an invoice by email. Alternatively you can pick up a copy of your invoice directly from the website. The invoice amount will be direct debited approximately 20 days after you have been invoiced. Please read our Electronic Invoices Fact Sheet in the Accessing the PPSR section of our **Information Library**.

Credit Card - Credit card transactions are processed using 128-bit encryption technology. Your credit card details are transferred in such a way that the Ministry of Economic Development doesn't see or store them. Your transaction is validated in "real time".



Connection Requirements

Before using our online services, please check the **Optimal Site Settings** (under **Site Information** on our website) – especially if this is the first time you have used our website.

There are links on the web site to download the software you require. Select **Site Information** in the left hand menu bar, and then **Site Software**. If you don't have access to the internet you may wish to consider the following options:

- Use the internet access that is available in many public libraries and independent Internet terminal providers.
- Consult a legal or financial advisor or a search and registration agent.

For some services you will also need access to a fax machine and a printer and you may also need to provide an email address. e.g. when you form a company online with the Companies Office we email the director and shareholder consent forms to you. You need to be able to print these and fax the completed forms back to us.

User Administration Overview

Your customer account can have either two or three levels:

1. **Customer account level** – containing customer (organisational) details.
2. **Branch level** – groups within a customer organisation (optional).
3. **User level** – individuals within an organisation or its branches.

Note: Branch Level – this optional feature of your account is useful where your organisation wants to reflect a regional structure or perhaps to identify needs of different areas of business within your organisation eg. sales, service, administration.

An Administrator can be appointed within your organisation to maintain customer, branch and user details. The first user is automatically assigned Administrator status, but this can be changed at any time.

If you are an Administrator, you must log on before you can access any of the administration options.

Logon (using your 9-character User ID and your 7-character password) then select **User Administration** (**Note:** This option may be located under **My Tools** on some websites). Then you can:

- maintain your customer (organisational) details (including branch details if required).
- create additional users and administrators.
- specify the sites and services individual users can access.
- modify user details, including changing passwords and closing User IDs.
- download electronic invoices and data files.

Note: It is important to maintain current registered user information. Detailed information on maintaining your account is contained in later sections of this training guide.

! IMPORTANT: While it is usual practice for an organisation to set up just one customer account, we recommend that each person within your organisation has their own User ID and password to logon to our websites for the following reasons:

- To ensure proper use of the User ID. For example: If a person leaves the organisation it is a simple matter to close their User ID so that they can't continue to charge transactions to the customer.
- Transactions on your invoice are listed by User to make it easier to allocate costs to the appropriate file or cost centre (Direct Debit customers only).
- When people share User IDs and passwords, one person may change the password without telling others who then find that they can no longer logon to our websites.
- A User can set their own web preferences (PPSR and IPONZ websites) to suit their individual requirements.
- Administrators are able to set the level of access appropriate to each User's needs.

How to Register as a User

If anyone in your organisation has already registered as a user on one of our participating websites your organisation will already have a customer account and there may even be a direct debit facility in place. To save yourself time, please ask the Administrator to create a new user record for you rather than creating a whole new customer/user record. Contact us if you are not sure who your Administrator is.

To register as a user, visit any one of our websites.

1. Select the **Get User ID** button in the black menu bar that runs along the bottom of the screen.
2. Complete the online application form headed **Customer Details**.
3. Fields marked with an asterisk (*) must be completed.

User Details

These are your details as the first user attached to the customer account, you will also be an Administrator.

***First Name(s)**

***Last Name**

***Password** - Your password must have at least 7-characters, including at least one alphabetic (A-Z) and one numeric character (0-9).

*** Confirm Password** - Re-enter your password.

Expire password after - If you want your password to expire after a specified number of days, check this radio button, then enter the number of days after which the password should be expired. You can choose any number between 1 and 99 days. Alternatively, if you do not want your password to expire choose **Password never expires**.

***Telephone** - Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) - Use the same format as for the Telephone Number field.

***Email Address** - enter your email address.

Include user's password in email (optional) - We will email confirmation of your user details to you on completion of your registration. If you want this email to include your password, tick the box next to the **Include User's password in email** field.

Customer Details

These are the details of the organisation for which you work i.e. the customer of the Ministry of Economic Development.

***Organisation Name**

***Customer Category** - Pick the appropriate category from the drop-down list.

***Telephone** - Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) - Use the same format as for the Telephone Number field.

Email Address for Invoice (optional) - Complete this field to receive original invoices automatically via email at the end of each month. If you do not complete this field, invoices will not be emailed and you will need to access one of our participating websites to view a copy online. If you want to receive invoices at Branch level, you need to complete the Email Address For Invoice field on the Branch Administration screen.

***Postal Address**

Street Address (optional) - only enter an address here if it differs from the Postal Address already supplied.

Enable the creation of Branches (optional) - Change this field to **Yes** if you want to create a customer account structure that contains Branches. Branches can be invoiced separately and can be used to obtain individual invoices for Users or groups of Users.

Payment Details

This section allows you to specify how you will pay for chargeable services. If you are setting up a Branch structure, complete payment details for each Branch via the Branch Details screen.

Payment Method – You can choose to pay by credit card only, or leave the field to the default payment method of **Direct Debit**.

Direct Debit Limit – For direct debit payments, you can enter a direct debit limit for a month's transactions, beyond which direct debit transactions will not be accepted.

Bank Details – If you choose to pay by direct debit, you must enter the details of a bank account from which direct debit payments can be made to the Ministry of Economic Development. Direct debit customers can also pay by credit card at the time of purchase, if desired.

Note: If you choose to pay by Direct Debit, we will email you a direct debit form as a PDF file. You will need Adobe Acrobat Reader software installed to be able to view and print this form. [Visit the Adobe website to download Adobe Acrobat Reader.](#)

Sites and Services

This section allows you to restrict the sites and services that Users and Branches can access.

To allow all options, leave both boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control **[Ctrl]** key and then click on each entry you want to select. Select **OK** to exit the pop up list and insert the chosen options in the box.

TAKE CARE – When you select a site or service at the customer account level all users attached to that account will have restricted access to our Sites or Services (i.e. Only those that you have specified).

If you intend to restrict access for certain users you should make these selections by modifying the User Details.

4. Once the application form is completed click **Save** to continue.
5. Read the **Terms And Conditions** and **Privacy Statement** and tick the box to confirm you accept them, then select **Continue**.
6. An **Account Confirmation** screen will be displayed including your User ID and User Name.

! IMPORTANT – Click on the **OK** button to confirm the opening of your customer account before proceeding. Your User ID will only be able to be used to Logon to our websites if you click on **OK**.

7. Our home page will be displayed and you are logged on.
8. We will email your User ID to you. Please ensure you keep this in a secure place as you will need it when you access our websites (especially the PPSR website). You can logon to our participating websites as soon as you have been allocated a User ID number and password.
9. If you have elected to operate a direct debit facility, complete and sign the direct debit form that is emailed to you. Return the completed direct debit form to us (the address is on the form). In the meantime, you can use all the extra facilities available to registered Users and can pay for any chargeable services by credit card.

Users – Updating Your Own Details

How to Update Your Telephone or Fax Number

Users can modify their own telephone and fax number, Administrators can update these details for any User. Begin by visiting any one of our websites.

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – User Details – Modify User**.
(Note This option may be located under **My Tools** on some websites).
3. **Telephone** – Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.
4. **Fax** – Use the same format as for the Telephone Number field.
When you have finished click **Save** to continue.
5. We will display a message on screen to confirm that your information has been updated.
6. Select **OK**.

Forgot Your Password?

If you have forgotten your password, you can reset it online. We will email the new password to the email address set up in your user account. It will not be displayed on the screen.

1. Select the **Logon** button to display the Logon screen.
2. Select the **Forgot My Password** button to display the Forgot My Password screen.
3. Enter your **User ID**. Note: You must enter a valid User ID.
4. Select **Continue**. We will display a screen confirming that your new password will be emailed to you.
5. Once you have received your new password and have logged on, you can change your password to one of your own choice.

Notes: Passwords must contain 7 alphanumeric characters, including at least one alphabetic and one numeric character, with no spaces or punctuation.

To change your password logon then choose **User Administration > User Details > Modify User** from the left hand menu.

How to Change Your Password

Users can change their own password, Administrators can modify passwords for any user. Begin by visiting any one of our websites.

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – User Details – Modify User**.
(Note This option may be located under **My Tools** on some websites).
3. **Password** – You can't see what a password is but you can enter a new one. The password must have at least 7 characters, including at least one alphabetic (A-Z) and one numeric character (0-9) - no spaces or punctuation. New passwords must also be different from previous passwords you've used for this User ID. You need to enter the password in both password fields as a cross- check.
4. When you have finished click **Save** to continue.
5. We will display a message on screen to confirm that your information has been updated.
6. Select **OK**.

Administrators – Updating Other Users' Details

This section of the training guide is intended for Administrators. Only users with Administrator rights will have the necessary access to make the changes described here. In this section you will learn how to:

- [Create a User](#)
- [Unlock a User ID](#)
- [Close a User ID](#)
- [Amend Restrictions on a User ID](#)
- [Update All User Details](#)

A Global Administrator can create Users and associate them with any established Branch. A Branch Administrator can also create User IDs and they will automatically be associated with that Branch.

How to Create a User

An Administrator can create any number of users. Begin by visiting any one of our websites and:

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – User Details – Create User**.
(Note This option may be located under **My Tools** on some websites).
3. Complete the online form headed **User Administration**.
4. Fields marked with a red asterisk * must be completed.

***First Name(s)**

***Last Name**

***Password** – Your password must have at least 7-characters, including at least one alphabetic (A-Z) and one numeric character (0-9).

*** Confirm Password** – Re-enter your password.

Expire password after – If you want the user's password to expire after a specified number of days, check this radio button, then enter the number of days after which the password should be expired. You can choose any number between 1 and 99 days. Alternatively, if you do not want the user's password to expire choose **Password never expires**.

***Telephone** – Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) – Use the same format as for the Telephone Number field.

***Email Address** – enter your email address.

Include user's password in email (optional) – We will email confirmation of your user details to you on completion of your registration. If you want this email to include your password, tick the box next to the **Include User's password in email field**.

Set user up as an Administrator? Defaults to **No** but if you would like this new User to be an Administrator for your Customer or Branch change this field to **Yes**.

Status – Defaults to **Active**, this can later be changed as needed.

Branch – Users can either be assigned to a Branch, or left unassigned. If left unassigned, they remain associated with the customer. If the User is to be assigned to a Branch, select a Branch from the drop-down list.

Note: If the User is an Administrator and is assigned to a Branch, they will be restricted to maintaining Users for that Branch. If the Administrator is not assigned to a Branch, they will be able to change data at all levels.

Default PPSR Secured Party Group – Complete these fields only if the User will be registering financing statements on the PPSR. For more information on these settings refer to the PPSR.

Sites and Services

This section allows you to restrict the sites and services that Users can access.

To allow all options, leave the boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control **[Ctrl]** key and then click on each entry you want to select. Select **OK** to exit the pop up list and insert the chosen options in the box.

The settings you choose here override those set at Customer or Branch level.

5. Once the User Administration form is completed click **Save** to continue.
6. We will display a message on screen to confirm that the User's information has been updated.
7. We will also email the User ID to the address supplied (the email will include the password, if you chose this option). Users should take care to keep this in a secure place as they will need it to access our websites (especially the PPSR website). New Users can access our websites as soon as they have been allocated their User ID and password.

How to Unlock a User ID

A User ID will be locked if an incorrect password is entered 3 times when logging on. An Administrator can unlock a User. Begin by visiting any one of our websites.

1. **Logon** (using your 9 character User ID and your 7 character password).
2. Select **User Administration – User Details – Modify User**.
(Note This option may be located under **My Tools** on some websites).
3. **Amend Status To** – will display as **MAX Failed Logons**, from the drop-down list choose **Active** – to reactivate the User.
4. Once the **User Administration** form is completed click **Save** to continue.
5. We will display a message on screen to confirm that the User's information has been updated.
6. Select **Continue** to return to the list of Users.

How to Close a User ID

An Administrator can close a User ID. Begin by visiting any one of our websites.

1. **Logon** (using your 9 character User ID and your 7 character password).
2. Select **User Administration – User Details – Modify User**.
(Note This option may be located under **My Tools** on some websites).
3. **Amend Status To** – Defaults to **Active**, from the drop down list choose **Closed** to close a User ID for a person who has left your organisation or who no longer needs their User ID.
4. Once the **User Administration** form is completed click **Save** to continue.
5. We will display a message on screen to confirm that the User's information has been updated.
6. Select **Continue** to return to the list of Users.

How to Amend Restrictions on a User ID

An Administrator can restrict a User's access to our websites or services. When a new option has been added to our services list, Users with restricted access will not be automatically granted access to the new service. An Administrator can alter those restrictions for a User's ID at any time. Begin by visiting any one of our websites.

1. **Logon** (using your 9 character User ID and your 7 character password).
2. Select **User Administration – User Details – Modify User**.
(Note: This option may be located under **My Tools** on some websites).
3. **Sites And Services**

This section allows you to restrict the sites and services that Users can access.

To allow all options, simply leave both boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control **[Ctrl]** key and then click on each entry you want to select. Select **OK** to exit the pop-up list and insert the chosen options in the box. The settings you choose here override those set at Customer or Branch level.

4. Once the **User Administration** form is completed click **Save** to continue.
5. We will display a message on screen to confirm that the User's information has been updated.
6. Select **Continue** to return to the list of Users.

How to Update all User Details

An Administrator can modify details for their Users. Begin by visiting any one of our websites.

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – User Details – Modify User**.
(Note This option may be located under **My Tools** on some websites).
3. If you have more than one User we will display a list of all Users, select the one you want to update to display their online **User Administration** form.
4. Fields marked with a red asterisk * must be completed and all fields can be updated by an Administrator.

***First Name(s)**

***Last Name**

***Password** – You can't see what a password is but you can enter a new one. The password must have at least 7 characters, including at least one alphabetic (A-Z) and one numeric character (0-9) – no spaces or punctuation. New passwords must also be different from previous passwords you've used for this User ID.

*** Confirm Password** – Re-enter your password.

Expire password after – If you want your password to expire after a specified number of days, check this radio button, then enter the number of days after which the password should be expired. You can choose any number between 1 and 99 days. Alternatively, if you do not want your password to expire choose **Password never expires**.

***Telephone** – Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) – Use the same format as for the Telephone Number field.

***Email Address** – enter your email address.

Include user's password in email (optional) – We will email confirmation of your user details to you on completion of your registration. If you want this email to include your password, tick the box next to the **Include User's password in email** field.

Set User up as an Administrator? Defaults to **No** but if you would like this User to be an Administrator for your Customer or Branch change this field to **Yes**.

Amend Status To – Normally defaults to **Active**.

- Change the Status to **Closed** for a person who has left your organisation or for someone who should no longer use their User ID.
- If the status is **MAX Failed Logons** – the User ID has been automatically locked because an incorrect password has been entered 3 times. Change the Status to **Active** to reactive the User ID.

Branch – If Branches have been created, users can either be assigned to a Branch or left unassigned. If left unassigned, they remain associated with the main Customer record. If the User should be assigned to a Branch, select the appropriate Branch from the drop-down list.

Note: If the User is also an Administrator and is assigned to a Branch, they will only be able maintaining Users for that Branch. If the Administrator is not assigned to a Branch, they will be able to change data at all levels (Customer, Branch and User).

Default PPSR Secured Party Group – Complete these fields only if the User will be registering financing statements on the PPSR. For more information on these settings refer to the PPSR website at www.ppsr.govt.nz.

Sites and Services

This section allows you to restrict the sites and services Users can access.

To allow all options, leave both boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control **[Ctrl]** key and then click on each entry you want to select. Select **OK** to exit the pop up list and insert the chosen options in the box.

The settings you choose here override those set at Customer or Branch level.

5. Once the **User Administration** form is completed click **Save** to continue.
6. We will display a message on screen to confirm that the User's information has been updated.
7. Select **Continue** to return to the list of Users.

Administrators – Updating Customer Account Details

This section of the training guide is intended for Administrators. Only Users with Administrator rights have the necessary access to make the changes described here. In this section you will learn how to:

- [How to Update Customer Account Details](#)
- [How to Receive Invoices by Email](#)
- [How to View or Print Copies of Invoices](#)

All customer account information can be managed online. An Administrator can update Customer, Branch or Users details. They can also view invoices.

The customer account structure is common to all of our websites. Changes you make to your customer account details while logged onto one website will apply to the other websites.

How to Update Customer Account Details

Once a customer account has been established the Administrator can update the details at any time. This includes the organisation's addresses, contact details or changing the bank account that the direct debit is paid from.

If you are an Administrator, begin by visiting any one of our websites then:

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – Account Details**.
(Note This option may be located under **My Tools** on some websites).
3. Complete the online form headed **Customer Details**.
4. Fields marked with an asterisk* must be completed.

Customer Details

These are the details of the business or organisation for which you work i.e. the customer of the Ministry of Economic Development.

Customer Id – We allocate this unique ID to you automatically – it is not used to Logon to any of our websites, it is used purely for identification purposes. This cannot be changed once the customer account has been established.

*Organisation Name

Status – Normally this is set to Active. If you choose the **Amended Status** of Closed, the customer account will be closed along with any the associated branch accounts and all User IDs.

***Customer Category** – You can choose from the drop-down list to change this selection if the category listed is incorrect.

***Telephone Number** – Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) – Use the same format as for the Telephone Number field.

Email Address for Invoice (optional) – Complete this field to receive original invoices automatically via email at the end of each month. If you do not complete this field, invoices will not be emailed and you will need to access this site to view a copy online. If you want to receive invoices at Branch level, you need to complete the Email Address For Invoice field on the Branch Administration screen.

*Postal Address

Street Address (optional) - only enter an address here if it differs from the Postal Address already supplied.

Enable the creation of Branches (optional) - Change this field to **Yes** if you want to create an organisation structure with Branches. Branches can be invoiced separately and can be used to obtain individual invoices for Users or groups of Users.

Payment Details

This section allows you to specify how you will pay for chargeable services. If you are setting up a Branch structure, complete payment details for each Branch via the Branch Details screen.

Payment Method - You can choose to pay by credit card only, or leave the field defaulted to a payment method of Direct Debit.

Direct Debit Limit - For direct debit payments, you can enter a direct debit limit for a month's transactions, beyond which direct debit transactions will not be accepted.

Current Bank Details - If you already pay by direct debit, your current bank details are displayed here.

New Bank Details - If you choose to pay by direct debit, or need to change the account that your direct debit operates on, enter the details of your bank account here. Direct debit customers can also pay by credit card at the time of purchase, if desired.

Note: If you choose to pay by Direct Debit, we will email you a direct debit form as a PDF file. You will need Adobe Acrobat Reader software installed to be able to view and print this form. [Visit the Adobe website to download Adobe Acrobat Reader.](#)

Sites and Services

This section allows you to restrict the sites and services that Users and Branches can access.

To allow all options, leave both boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control [**Ctrl**] key and then click on each entry you want to select. Select **OK** to exit the pop up list and insert the chosen options in the box.

TAKE CARE - When you select a site or service at the customer account level all users attached to that account will have restricted access to our Sites or Services (i.e. Only those that you have specified).

If you intend to restrict access for certain users you should make these selections by modifying the User Details.

5. Once you have made the necessary updates to the **Customer Details** form click **Save** to continue.
6. We will display a message on screen to confirm that the record has been updated.
7. When you select **OK** you will be taken back to the User Administration menu.

How to Receive Your Invoices by Email

For Direct Debit customers, the Administrator can modify the Customer record to ensure that originals of your invoices are emailed to the appropriate person each month.

If you are an Administrator, begin by visiting any one of our websites then:

1. **Logon** (using your 9-character User ID and your 7-character password).
2. **Select User Administration – Account Details.**
(Note This option may be located under **My Tools** on some websites).
3. **Email Address for Invoice** – Complete this field to receive original invoices automatically via email at the end of each month. If you do not complete this field, invoices will not be emailed and you will need to access this site to view a copy online. If you want to receive invoices at Branch level, you need to complete the Email Address For Invoice field on the Branch Administration screen.

Note: We will email your invoice as an Adobe Acrobat PDF file. You will need Adobe Acrobat Reader software installed to be able to view and print this invoice. [Visit the Adobe website to download Adobe Acrobat Reader.](#)

4. Once the **Customer Details** form is completed click **Save** to continue.
5. We will display a message on screen to confirm that the Customer record has been updated.
6. When you select **OK** you will be taken back to the User Administration menu.

How to View or Print Copies of Invoices

Direct Debit customers, regardless of whether they have chosen to receive original invoices via email, can visit our website at any time to view or print a copy of their current or previous invoices.

If you are an Administrator, begin by visiting any one of our websites, then:


1. **Logon** (using your 9-character User ID and your 7-character password).
2. **Select User Administration – Invoices.**
(Note: This option may be located under **My Tools** on some websites).
3. In the **Invoice Collection** screen you will see a list of invoices for your account. For each invoice information is held in two formats:
 - o An Adobe Acrobat PDF file. This is the official record and can be used for tax and audit purposes. It is marked as a copy, but in all other respects is identical to the invoice that is emailed.

Note: You will need Adobe Acrobat Reader software installed to be able to view and print this invoice. [Visit the Adobe website to download Adobe Acrobat Reader.](#)

- o A data file (MS Excel format). This can be used for sorting transactions or incorporating them into your own accounting or disbursement system to make billing even easier.

Note: To download these data files you will need to have MS Excel or MS Excel Viewer installed. Links are available on our website to download the software you need. From the left-hand menu choose **Site Information** then **Site Software** (on some of our sites Site Software may appear in the footer instead of in the left hand menu).

4. Click on the link for the invoice and information you want.
5. Once your chosen invoice is displayed on the screen you can choose to print the invoice or perhaps save a copy to your own PC.
6. When you select **Exit** you will be taken back to the User Administration menu.

Note: Where there is no PDF icon  for a particular invoice you may instead see the notation "Posted". This means the invoice is not available electronically as it was posted to a mailing address prior to the introduction of the online service or it has been archived. However you will still have access to the data files for Posted invoices.

Administrators – Updating Branch Details

This section of the training guide is intended for Administrators. Only Users with Administrator rights will have the necessary access to make the changes described here. In this section you will learn how to:

- [Create a Branch](#)
- [Update Branch Details](#)
- [Receive Invoices for Your Branch by Email](#)
- [Update User Details for a Branch](#)

A Global Administrator can create Users and associate them with any established Branch. A Branch Administrator can also create Users and they will automatically be associated with that Branch.

It is possible to have several Branches to reflect the way your organisation operates. We recommend that you create Branches where it is necessary to charge fees to different cost centres or restrict access to Sites and Services for different groups of users within your organisation.

How to Create a Branch

The Administrator can create any number of Branches (provided the **Enable creation of Branches** flag in the Customer screen is set to **Yes**). Begin by visiting any one of our websites, then:

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – Branch Details – Create Branch**.
(Note: This option may be located under **My Tools** on some websites).
3. Complete the online form headed **Branch Administration**.
4. Fields marked with a red asterisk * must be completed.

*Branch Name

***Telephone Number** – Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) – Use the same format as for the Telephone Number field.

Email Address for Invoice (optional) – Complete this field to receive original invoices for your Branch automatically via email at the end of each month. If you do not complete this field, invoices will not be emailed and you will need to access this site to view a copy online. **Note:** You will also need to set the "Invoice at Branch level" flag to **Yes**.

*Postal Address

Street Address (optional) – only enter an address here if it differs from the Postal Address already supplied.

Invoice at Branch level? – Defaults to **No** which means invoices are sent to the address loaded for the Customer but if you would like to receive invoices for the Branch change this field to **Yes**. Note: You will also need to complete the Payment Details section of this form.

Payment Details

This section allows you to specify how your Branch will pay for chargeable services.

Payment Method – If you have chosen to be invoiced at Branch Level you must also choose your payment method. You can choose to pay by credit card only, or leave the field to the default payment method of **Direct Debit**.

Credit Limit – For direct debit payments, you can enter a limit for a month's transactions, beyond which direct debit transactions will not be accepted.

Bank Details – If you choose to pay by direct debit, and you are being invoiced at branch level, you must enter the details of a bank account from which direct debit payments can be made to the Ministry of Economic Development. Direct debit customers can also pay by credit card at the time of purchase, if desired.

Note: If you choose to pay by Direct Debit, we will email you a direct debit form as a PDF file. You will need Adobe Acrobat Reader software installed to be able to view and print this form. [Visit the Adobe website to download Adobe Acrobat Reader.](#)

Sites and Services

This section allows you to specify the sites and services that your Branch Users can access.

To allow all options, leave both boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control **[Ctrl]** key and then click on each entry you want to select. Select **OK** to exit the pop up list and insert the chosen options in the box.

TAKE CARE – When you select a site or service at the branch level all users attached to that branch will have restricted access to our Sites or Services (i.e. Only those that you have specified).

If you intend to restrict access for certain users you should make these selections by modifying the User Details.

5. Once the Branch Administration form is completed click **Save** to continue.
6. We will display a message on screen to confirm that the Branch information has been updated.

How to Update Branch Details

Once a Branch has been established the Administrator (for the Customer Account or this Branch) can update the details at any time. This includes the Branch addresses, contact details or changing the bank account that the direct debit is paid from.

An Administrator should begin by visiting any one of our websites, then:

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – Branch Details – Modify Branch**.
(Note This option may be located under **My Tools** on some websites).
3. Complete the online form headed **Branch Administration** (Note: If there is more than one Branch, a list of Branches will be displayed. Click on the link for the Branch you want to update).
4. Fields marked with a red asterisk * must be completed.

Branch Details

*Branch Name

Status – normally this is set to Active, if you amend the Status to Closed, the Branch will be closed and all of the User IDs associated with the Branch will be deactivated too.

***Telephone Number** – Use all 3 fields supplied. In the first field choose the appropriate the country code (eg. +64 for New Zealand), in the second field enter the area code and in the third field the telephone number.

Fax Number (optional) – Use the same format as for the Telephone Number field.

Email Address for Invoice (optional) – Complete this field to receive original invoices for your Branch automatically via email at the end of each month. If you do not complete this field, invoices will not be emailed and you will need to access this site to view a copy online. **Note:** You will also need to set the "Invoice at Branch level" flag (below) to **Yes**.

*Postal Address

Street Address (optional) – only enter an address here if it differs from the Postal Address already supplied.

Invoice at Branch level? – Defaults to **No** which means invoices are sent to the address loaded for the Customer but if you would like to receive invoices for the Branch change this field to **Yes**. **Note:** You will also need to complete the Payment Details section of this form.

Payment Details

This section allows you to specify how your Branch will pay for chargeable services.

Payment Method – If you have chosen to be invoiced at Branch Level you must also choose your payment method. You can choose to pay by credit card only, or leave the field defaulted to a payment method of Direct Debit.

Credit Limit – For direct debit payments, you can enter a direct debit limit for a month's transactions, beyond which direct debit transactions will not be accepted.

Current Bank Details – If you already pay by direct debit, your current bank details are displayed here.

New Bank Details – If you choose to pay by direct debit, or need to change the account that your direct debit operates on, enter the details of your bank account here. Direct debit customers can also pay by credit card at the time of purchase, if desired.

Note: If you choose to pay by Direct Debit, we will email you a direct debit form as a PDF file. You will need Adobe Acrobat Reader software installed to be able to view and print this form.

[Visit the Adobe website to download Adobe Acrobat Reader.](#)

Sites and Services

This section allows you to specify the sites and services that your Branch Users can access.

To allow all options, leave both boxes blank.

To restrict access to particular websites or services, use the **Add** buttons to display a pop-up list of sites or services and click on an entry to choose it. To choose multiple entries, hold down the Control [Ctrl] key and then click on each entry you want to select. Select **OK** to exit the pop up list and insert the chosen options in the box.

TAKE CARE – When you select a site or service at the branch level all users attached to that branch will have restricted access to our Sites or Services (i.e. Only those that you have specified).

If you intend to restrict access for certain users you should make these selections by modifying the User Details.

5. Once the Branch Administration form is completed click **Save** to continue.
6. We will display a message on screen to confirm that the Branch information has been updated.

How to receive branch invoices by email

For Direct Debit customers, the Administrator can modify the Branch details to ensure that originals of your invoices are emailed to the appropriate person each month.

If you are an Administrator, begin by visiting any one of our websites, then:

1. **Logon** (using your 9-character User ID and your 7-character password).
2. Select **User Administration – Branch Details – Modify Branch**.
(Note: This option may be located under **My Tools** on some websites).
3. **Email Address for Invoice** – Complete this field to receive original invoices automatically via email at the end of each month. If you do not complete this field, invoices will not be emailed and you will need to access this site to view a copy online.
4. **Invoice at Branch level** – Defaults to **No** when the Branch is first established, which means invoices are sent to the address loaded for the Customer but if you would like to receive invoices for the Branch change this field to **Yes**. You will also need to complete the Payment Details section of this form.
5. **Payment Details**
This section allows you to change how your Branch will pay for chargeable services. Note: If you already pay by Direct Debit, your current details will be displayed.

Payment Method – If you have chosen to be invoiced at Branch Level you must also choose your payment method. You can choose to pay by credit card only, or leave the field defaulted to a payment method of Direct Debit.

Credit Limit – For direct debit payments, you can enter a direct debit limit for a month's transactions, beyond which direct debit transactions will not be accepted.

Current Bank Details – If you already pay by direct debit, your current bank details are displayed here.

New Bank Details – If you choose to pay by direct debit, or need to change the account that your direct debit operates on, enter the details of your bank account here. Direct debit customers can also pay by credit card at the time of purchase, if desired.

Note: If you choose to pay by Direct Debit, we will email you a direct debit form as a PDF file. You will need Adobe Acrobat Reader software installed to be able to view and print this form. [Visit the Adobe website to download Adobe Acrobat Reader.](#)

6. Once the **Branch Administration** form is completed click **Save** to continue.
7. A confirmation message displayed on screen will verify that the Branch Details have been updated successfully.

Updating User Details for a Branch

The process to update user details is the same whether the customer account has been structured with branches or not. Please read the section in this training guide on Users. It contains everything from creating new Users to closing their User ID.

Further Information

In our **Information Library** we have gathered together a range of resources to help you use the PPSR services. You will find answers to common questions, forms and fact sheets along with training guides that step you through our online services.

Alternatively, call us during business hours (8.30am–5pm weekdays) on **Freephone 0508 PPSR INFO 0508 777 746** (Overseas callers call +64 3 962 2602).

Keep up to date with news and developments for the PPSR and other business units and subscribe to the Business Update, our regular online newsletter. Sign up on line to receive your copy of the Business Update at <http://news.business.govt.nz/>.

Updated 9 October 2006