



finPOWER Connect - PPSR

Installation and Processing Guide

Version 1.01

20th November 2024



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Disclaimer

finPOWER Connect includes functionality to send Security Statements to the **PPSR**.

As per your Software License Agreement, it is your responsibility to make sure finPOWER Connect is fit for your purposes and you should seek independent professional advice from sources such as Lawyers, Accountants and Government Agencies.

This is a guideline only. It is not intended to be definitive and should not be used in place of legal advice. You are responsible for staying up to date with legislative changes.

This document is correct as at time of writing, but subsequent legislative changes may affect the relevance of the contents.

Please note: not all functionality is available in all versions of finPOWER Connect (particularly older versions) or all Countries. We suggest you search the Intersoft Knowledge Base for updates and information.



Revision History

Date	Version	By	Details
30/08/2023	1.00	AC	Created
20/11/2024	1.01	AC	Updated to new format and to include billing information for PPSR



Overview

This document covers finPOWER Connect information for connecting to the **PPSR** and PPSR setup information.



Summary

Licence Requirements

- Securities Register
- PPSR Interface
- Security Enquiry



Configuration - MBIE

MBIE – Obtaining a RealMe Login

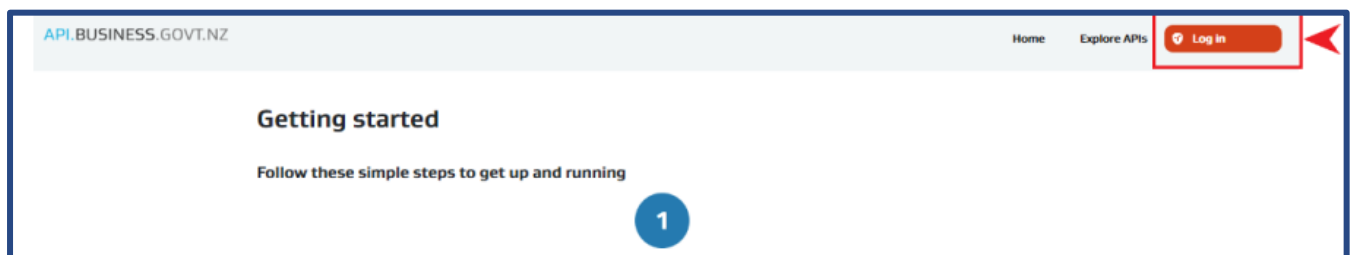
If you do not have a RealMe Login, click the RealMe Site <https://www.realme.govt.nz/> and follow the instructions on the screen.

Please Note: A RealMe login is used for a number of different NZ Companies and Government Departments e.g., applying for or renewing a Passport and accessing myIR for the Inland Revenue. Therefore, it is important that where you are using your RealMe Login for work related activities that you keep your login credentials safe and do not share these with other users.

MBIE – Obtaining Credentials

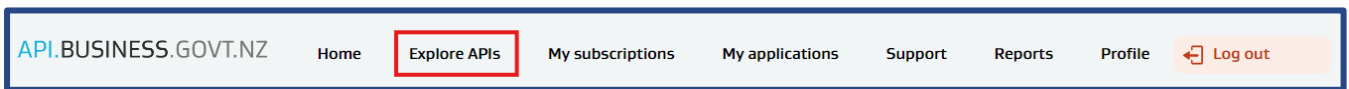
Please note:

- You need to repeat the steps for each API that is required i.e., PPSR.
 - You may receive an email from API Support, please don't ignore this and reply to it otherwise the subscriptions may never change to **Active**.
1. Go to <https://portal.api.business.govt.nz/getting-started>
 2. Click Login (top right-hand corner) and use your RealMe to log into the site.

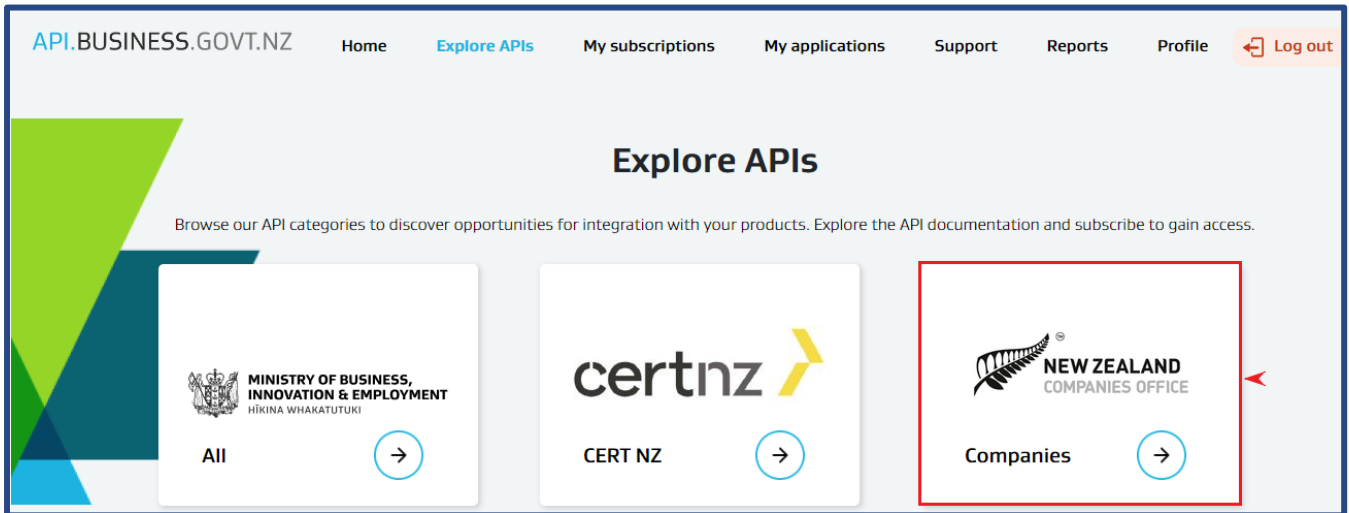


3. Enter your Account details and click **Log in** once all fields have been entered.

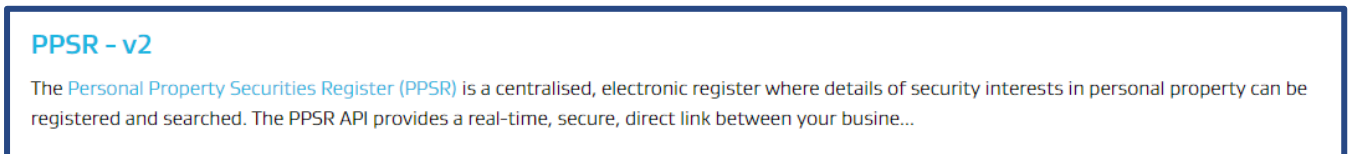
4. Click on **Explore APIs**.



5. Click **New Zealand Companies Office**.



6. And on the next page scroll down the page and **PPSR – v2**.



And then click on **PPSR**, which is in small blue writing further down the page.

PPSR

v2

API definition

Changelog

The [Personal Property Securities Register \(PPSR\)](#) is a centralised, electronic register where details of security interests in personal property can be registered and searched. The PPSR API provides a real-time, secure, direct link between your business systems and the PPSR. You can conduct most PPSR transactions, including searches, registrations, renewals, amendments and discharges, directly from your own software, instead of using the PPSR website.

See [here](#) for additional information on how to use the API.

API Information

You must subscribe to a product to access an API. At the end of that process you will be able to use test (sandbox) environment subscription keys to begin development. When you have completed testing, simply use the production keys to access the live services. Click [here](#) for more details.

Products

This API belongs to the following product(s). Click a product name to subscribe.

Search products

Name	Description
PPSR	Subscribe to this product to gain access to the PPSR API.

The green **Subscribe** button will appear, which you need to click.

PPSR

Subscribe to this product to gain access to the PPSR API.

Subscribe

7. Clicking the 'Subscribe' button took me to the page (shown here). However, sometimes it logs you out and you need to log back in, at which point you will be taken back to the following page:

New subscription - PPSR

Method of subscription ⓘ

Subscription key ▼

Please note

Subscription key API access is the simplest method to implement and is suitable for situations where a static access key provides sufficient security, and no end-user authorisation is required. Unique subscription keys will be created for production and sandbox use, referred to using the subscription name provided below. The subscription will continue to be valid until explicitly cancelled or replaced by you. If the subscription key is compromised, others may be able to call APIs using your key. Click [here](#) for more details.

Subscription details

Product
PPSR

Subscription name ⓘ

PPSR

Please note

ⓘ This subscription will generate a production and a sandbox subscription key to authenticate to each API in the product being subscribed to. The name entered above will enable you to locate them in your subscriptions list.

Create **Cancel**

Leave the 'Method of Subscription' as **Subscription key**. Do NOT select any other option. Click the **Create** button.

8. Once you have completed the steps in #7, click on 'My Subscriptions', shown at the top of the page. You will see the page as follows with the State set to 'Submitted':

API.BUSINESS.GOV.TZ Home Explore APIs **My subscriptions** My applications Support Reports Profile Log out

My subscriptions

Subscription details			Product	State	Action
Name	PPSR	Rename	PPSR	Submitted	Cancel
Requested on	11/19/2024				
Name	PPSR (Sandbox)	Rename	PPSR (Sandbox)	Submitted	Cancel
Requested on	11/19/2024				

9. Once the 'State' has changed to 'Active' the credentials will be ready for use.
The page shows you the Sandbox (test) and Production, Primary and Secondary keys.

My subscriptions					
Subscription details			Product	State	Action
Name	PPSR	Rename	PPSR	Active	Cancel
Started on	11/23/2022				
Primary key	xx	Show Regenerate			
Secondary key	xx	Show Regenerate			
Name	PPSR (Sandbox)	Rename	PPSR (Sandbox)	Active	Cancel
Started on	11/23/2022				
Primary key	xx	Show Regenerate			
Secondary key	xx	Show Regenerate			

Click the **Show** button to reveal the Key

Copy the Primary Key into Global Settings, Securities, PPSR NZ, **Subscriber Key**.

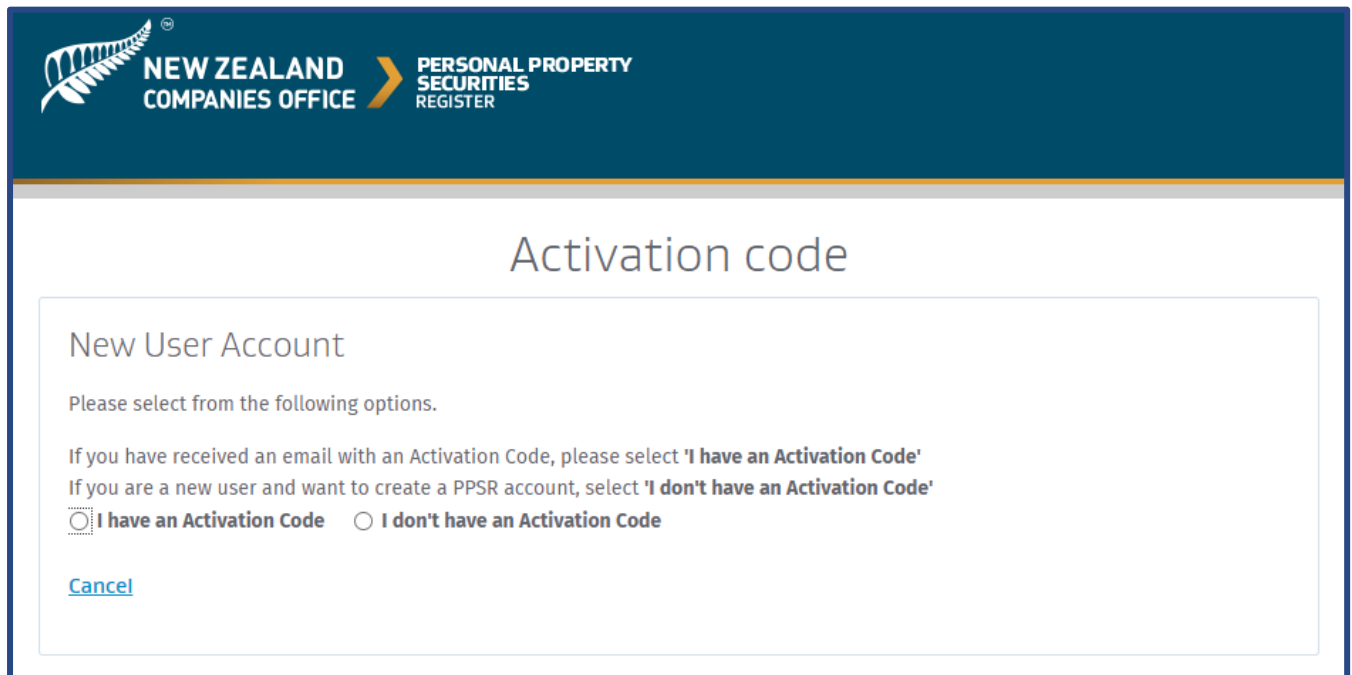
Please Note: ONLY use the **Sandbox** credentials while in **Test** mode.

PPSR - Organisation

The following steps can also be found in the Help centre on the PPSR site <https://ppsr.companiesoffice.govt.nz/help-centre/>

Creating an Organisation

1. Go to <https://ppsr.companiesoffice.govt.nz/> and login using the same RealMe Account used for obtaining API Subscriptions. The first time you log in the screen will look like:



NEW ZEALAND COMPANIES OFFICE PERSONAL PROPERTY SECURITIES REGISTER

Activation code

New User Account

Please select from the following options.

If you have received an email with an Activation Code, please select 'I have an Activation Code'

If you are a new user and want to create a PPSR account, select 'I don't have an Activation Code'

☒ I have an Activation Code ☐ I don't have an Activation Code

[Cancel](#)

2. Select **I don't have an Activation Code** and then click **Register new user**.

Choose this option if you're a new user creating an online services account on behalf of an Organisation. As such, you become the Account Administrator and can add or remove other Account users. You can also appoint another user to be an Administrator of the Account.

Please Note: we **highly** recommend that you have more than one User in the Administrator Role.

3. At the top of the page, tick 'I want to create PPSR Organisation Account'. Fill in the User Details, Contact Details, Physical Address and Postal Address.

Agree to the terms and conditions and click **Next**.

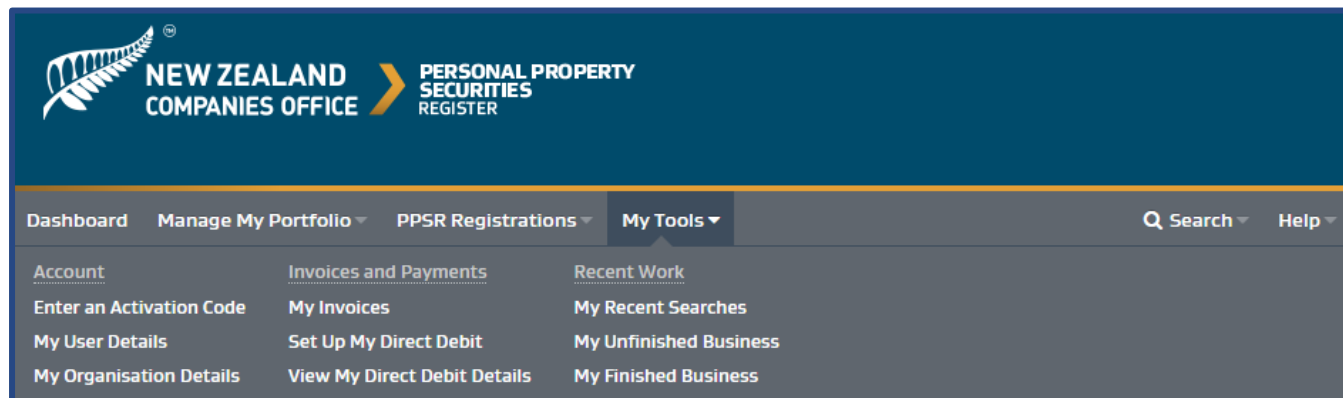
4. Enter the following information: Organisation name and type, Contact details for the organisation and Email notification settings.

Click **Create Organisation**.

Adding a User to an Organisation

As the Organisation Administrator, you need to create and add additional Organisation Users.

1. Within the Dashboard click **My Tools** and under Account, click on **My Organisation Details**.



2. Scroll down the page until you find the button **Add organisation user** and click on it.
3. You will need to fill in the following:
 - a. User details including whether they are an Admin User,
 - b. Contact Email and Phone number,
 - c. Physical and Postal Address.
4. When finished, click the **Create user** button.

This will send an email to the User with an Activation Code that they will require when logging into the PPSR Dashboard for the first time.

Connecting a User to an Organisation

1. A User that is logging in for the first time and has been set up by the Administrator user, needs to click the option **I have an Activation Code**. They then need to copy the code from the email that would have been sent in the previous steps and add this into the field **Activation Code**.

Click **Continue**.

NEW ZEALAND COMPANIES OFFICE **PERSONAL PROPERTY SECURITIES REGISTER**

Activation code

New User Account

Please select from the following options.

If you have received an email with an Activation Code, please select '**I have an Activation Code**'
 If you are a new user and want to create a PPSR account, select '**I don't have an Activation Code**'

☒ **I have an Activation Code** ☐ **I don't have an Activation Code**

Activation Code *

[Continue](#) [Cancel](#)

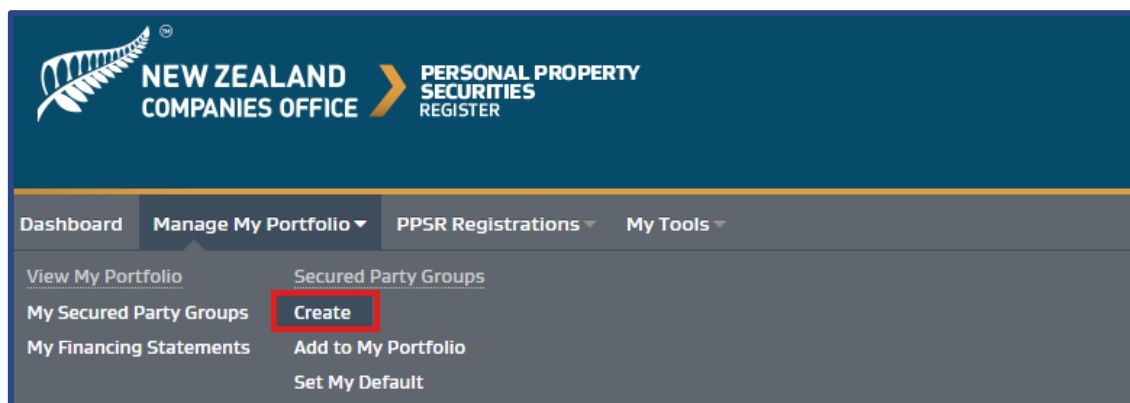
2. Change the Contact details if required, agree to the Terms and Conditions, and click **Next**.
3. Click **Create user**.

PPSR – Secured Party Group (SPG)

SPG Overview

Before you can register a Financing Statement on the PPSR, you must first create a 'Secured Party Group' (SPG) and enter the corresponding details into finPOWER Connect.

Within the Dashboard, click on **Manage My Portfolio** and then under **Secured Party Groups** click **Create**.



There are four steps to this process:

1. General Details
 - a. Tick the checkbox to declare that you are authorised to create the SPG.
 - b. Decide whether this SPG will be the default one. If you have more than one, this can be decided and updated via other menu options.
 - c. Click **Next Step**.
2. Secured Party Details
 - a. Select from the 'Add Secured Party' dropdown, 'Organisation'.
 - b. Enter the Organisation Name and other details required.
 - c. Click **Next Step**.
3. Email Notification Options
 - a. Select all the options that are relevant and required.
 - b. Click **Next Step**.
4. Review – review all the sections and click **Edit** to change any sections that require amending. When finished click **Register Group**. You will receive an email with the SPG ID and SPG Password; these will need to be saved to be entered into finPOWER Connect.

Setup My Direct Debit

You need to also set up Direct Debits to pay for PPSR transactions.



Once in the Portal, click **My Tools**, and then **Set Up My Direct Debits**.
You can go back and review these details, by clicking on the menu option **View My Direct Debit Details**.

Within finPOWER Connect there is a report that can be run to view the charges that will come through from PPSR.

To view this, go to Menu option Security, PPSR Transaction Report.
The resulting information includes chargeable items for example:

PPSR NZ Transaction Report											
Transaction Report											
PPSR NZ Transaction Report.											
		Date	Channel	Success	User	Transaction Type	Reg Number	Fee Status	Total	Errors	
1	...	20/11/2024 11:46:17	API	<input type="checkbox"/>	ADMIN	CreateFinancingStatement				1. PPSR Transaction failed.	
2	▶	20/11/2024 11:48:43	API	<input checked="" type="checkbox"/>	ADMIN	CreateFinancingStatement	F56ZS2BAP9H62R67	Unbilled	8.05		
3	...	20/11/2024 11:43:17	API	<input checked="" type="checkbox"/>	ADMIN	ListCustomerOrgFees					
4	...	20/11/2024 11:43:55	API	<input checked="" type="checkbox"/>	ADMIN	ListCustomerOrgFees					
5	...	20/11/2024 11:44:14	API	<input checked="" type="checkbox"/>	ADMIN	ListCustomerOrgFees					



Configuration – finPOWER Connect

finPOWER Connect – Global Settings

You will need to obtain Credentials as per the section called 'MBIE Account Creation'. Once you have an 'Active' PPSR Primary Key, enter it into the **Subscriber Key** field.

Global Settings

PPSR NZ
Settings used by the PPSR service.

General

Define Credentials for the PPSR API service.

Subscriber Key:

Define the service Request URLs.

Request URL:

Test URL:

Specify optional data to send.

☐ Send Debtor Postal Address?

☐ Send Debtor Phone, Fax and Email address?

☐ Send Individual Client AKAs as Debtors?

☒ Send the Name of the Person Acting for an Organisation (if available)?

Fallback Job Title:

Specify Search options.

☒ Default Client Name using wildcards for a Debtor Person/ Organisation?

☐ Default Client Middle Name(s) for a Debtor Person?

☐ Default Date of Birth for a Debtor Person?

☒ Default City/ Town for a Debtor Person/ Organisation?

Optionally define the Summary Page Script used to generate Reports.

Summary Page:

Security Enquiry Options.

☒ Use PPSR NZ for Security Enquiries (unchecked to disable)?

Summary Page:

Verify connection (Test Mode).

Import Information.

Other helpful websites.

OK **Cancel** **Apply**

All other fields stay the same as per the Help page on this topic:

<http://help.intersoft.co.nz/fin4.1.3/index.htm#XSettings.Global.SecurityPPSRNZ>

Click the **Verify User** and **Verify Org** buttons to make sure that the information entered is correct.

Please note: if you have not been set up as an Administrator on the Organisation via the PPSR site, then clicking the 'Verify Org' button may result in an error.

finPOWER Connect – User Preferences

If you would prefer to enter the PPSR Credentials in the User Preferences, go to the 'Securities, PPSR NZ' page.

As per the Global Settings, you will need to obtain new credentials as per the section called 'MBIE Account Creation'. Once you have these, enter the PPSR Primary Key into the 'Subscriber Key' field.

All other fields stay the same as per the Help page on this topic:

<http://help.intersoft.co.nz/fin4.1.3/index.htm#XSettings.User.Securities.PPSRNZ>

Click the **Verify User** button to check that the information entered is correct.

finPOWER Connect – Secured Party Group (SPG)

Menu Option – Admin, Secured Party Group

Go to menu option Admin, Secured Part Group and click the **+** 'Add' icon and enter the following information:

1. Code and Description – these are anything to make the SPG easily identifiable. If you are using more than one SPG you might consider using the SPG number as the Code.
2. Secured Party Group information.
 - a. Enter the **SPG Id** as created in the PPSR Dashboard or shown on the resulting email.
 - b. Enter the **Password** as received in the email from PPSR.

- c. Save the details and click on the **Verify** button to make sure that the information entered is correct.

Menu Option – Global Settings, Securities

Go to Menu option Global Settings, Securities, New Statements page. There is an option to set the default SPG. This field can be left blank if using more than one SPG.

The screenshot shows the 'Global Settings' window with the 'New Security Statements' tab selected. The left sidebar lists various settings categories, with 'Securities' expanded and 'New Statements' selected. The main area is titled 'Define default values for New Security Statements.' and contains the following fields:

- Next Code:** SS00026
- Group:** G (dropdown menu)
- Status:** Send (dropdown menu)
- SPG:** M (dropdown menu)
- Debtor Status:** To Be Advised (dropdown menu)

At the bottom right, there are buttons for 'OK', 'Cancel', and 'Apply'.

Menu Option – Admin, Entities

Go to Menu option Admin, Entities, Options page. From the **SPG** drop down list, select the default SPG for the Entity.

The screenshot shows the 'Entities' window with the 'M: Main Entity M' tab selected. The left sidebar lists various entity options, with 'Options' selected. The main area is titled 'Default Secured Party Group.' and contains the following fields:

- SPG:** M (dropdown menu)
- Logo image File Name or URL:** EntityLogo.png
- Resources for this Entity:** Image: (dropdown menu), Other: (dropdown menu)

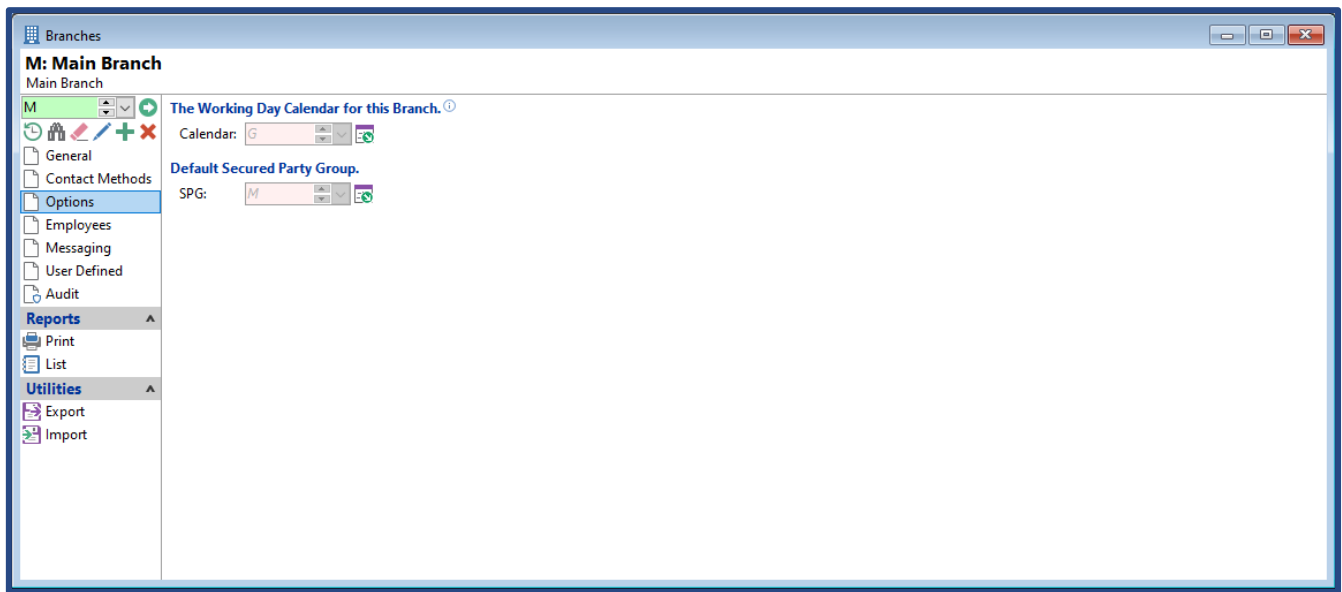
A red box highlights the 'Default Secured Party Group.' section, specifically the 'SPG' dropdown menu.

This field can be left blank in the following circumstances:

- Where you are using more than one SPG on the Entity,
- The SPG has been set on the Branch, or
- The SPG has been set in the Global Settings.

Menu Option – Admin, Branches

Go to Menu option Admin, Entities, Options page. There is an option to set the default SPG for the Branch.



This field can be left blank in the following circumstances:

- Where you are using more than one SPG for the Branch,
- The SPG has been set on the Entity or
- The SPG has been set in the Global Settings.

Adding a New Security Statement - SPG

If the SPG has been set as a default within the Global Settings, then the SPG field will automatically be filled in.

If instead the field was left blank on the Global Settings, Entities and Branches, then you will need to select the SPG for every new Security Statement.

For information regarding Security Statements with finPOWER Connect please go to the help pages, the following should assist:

- <http://help.intersoft.co.nz/fin4.1.3/index.htm#XSecurityStatement>
- <http://help.intersoft.co.nz/fin4.1.3/index.htm#XPPSRNZ.NZUpdateWizardOverview>
- <http://help.intersoft.co.nz/fin4.1.3/index.htm#XPPSRNZ.TransactionReport>