

InfoAgent

finPOWER Connect - InfoAgent

Installation and Processing Guide

Version 1.03

5th May 2023

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DISCLAIMER

finPOWER Connect includes functionality to cater for InfoAgent, a Security Enquiry for Vehicles and Credit Enquiry for Client Driver Licenses.

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
22/06/2022	1.00	AC	Created
01/08/2022	1.01	AC	Update for Valuation data
18/01/2023	1.02	AC	Update layout of document
05/05/2023	1.03	AC	Add additional functionality, Credit Enquiry options, Previous report and Monitoring.

OVERVIEW

This document covers finPOWER Connect information for InfoAgent.

SUMMARY

InfoAgent is a Security Enquiry provider, providing information on Vehicles or anything that has a Registration Plate. They also provide a Credit Enquiry option to be able to do a search on Client Driver's Licences in New Zealand.

InfoAgent options are available in both New Zealand and Australian databases.

For more information, please go to the following 'InfoAgent' sites:

- New Zealand <https://www.infoagent.co.nz/>
- Australia <https://www.infoagent.com.au/>

LICENCE REQUIREMENTS

- Cost Centres – required if using more than one Cost Centre.
- Credit Enquiry – required if doing Driver Licence searches.
- Securities Register.

CONFIGURATION - INFOAGENT

SETTING UP AN ACCOUNT WITH INFOAGENT

If you have not signed up with InfoAgent, click on the '**Sign Up**' button within Cost Centres which will take you to the website.

Once you have received your 'Client Secret', send this to admin@intersoft.co.nz with your CSN number where it will be 'encrypted' and sent back to you for use within finPOWER Connect.

CONFIGURATION – FINPOWER CONNECT

COST CENTRES

Credentials Tab

The following describes how to set up 'InfoAgent' within finPOWER Connect, Cost Centres.

1. Go to the Menu option, Admin, Cost Centres and select GLOBAL. If you are using other Cost Centres, then set these up as appropriate.
2. Click on the InfoAgent Page.
3. At the top of the page, '**Does this Cost Centre define InfoAgent details**', tick the 'Use Service' checkbox to indicate that the Cost Centre defines the Service information.

4. Click on the **Credentials** tab and fill in the following fields:
 - **Define the service Request URL** - leave blank; **only** enter a URL if specifically requested to.
 - **Define the API Credentials** - enter the **Client Id** as provided by InfoAgent and the encrypted **Client Secret** key.
5. Click the **Save** button. Once saved, you can click the Verify button to check the 'Service Status' and that the information entered is correct.

Test Credentials Tab

Credentials are **only** required on the Test Credentials page if you are doing UAT/Testing.

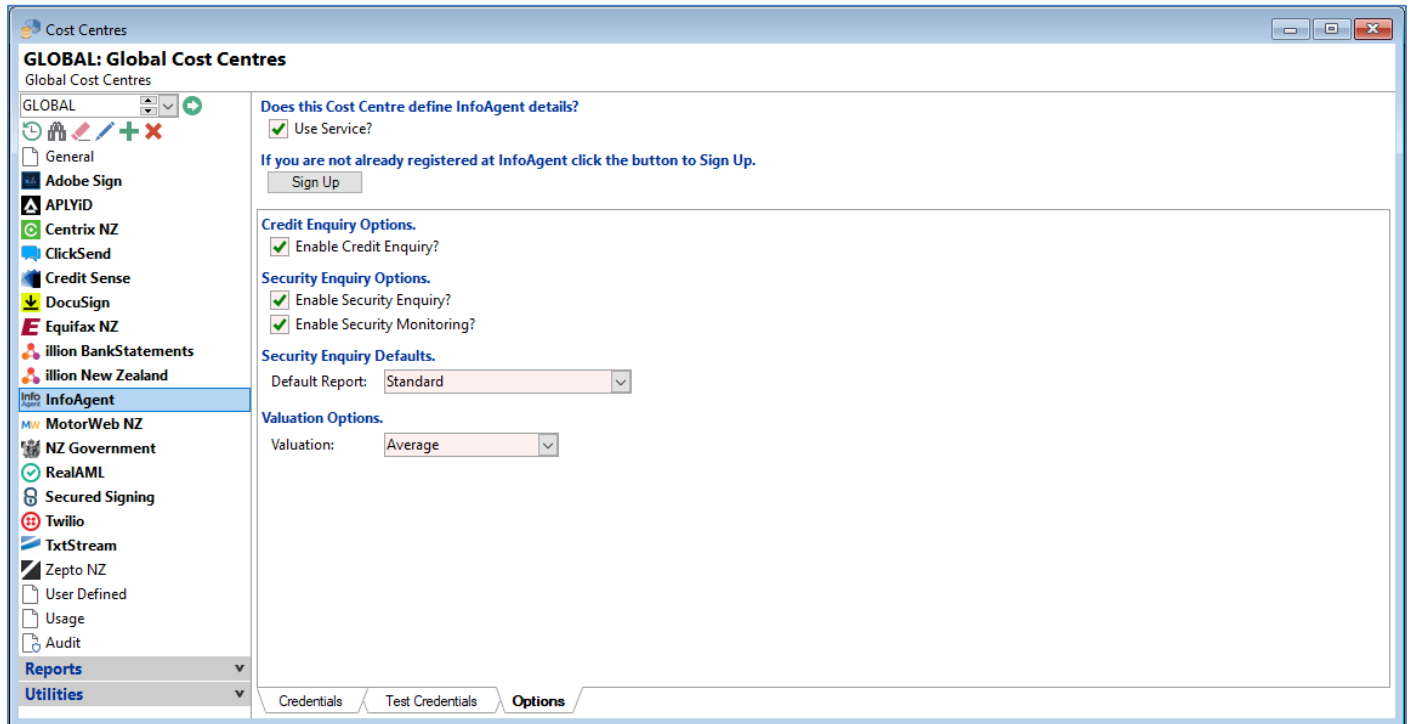
The screenshot shows a web application window titled "Cost Centres". On the left is a sidebar menu with a search bar and a list of services including General, Adobe Sign, APLyID, Centrix NZ, ClickSend, Credit Sense, DocuSign, Equifax NZ, illion BankStatements, illion New Zealand, InfoAgent (selected), MotorWeb NZ, NZ Government, RealAML, Secured Signing, Twilio, TxtStream, Zepto NZ, User Defined, Usage, and Audit. Below the list are "Reports" and "Utilities" sections. The main content area is titled "GLOBAL: Global Cost Centres" and shows a dropdown menu set to "GLOBAL". It contains a "Sign Up" button and a "Verify" button. The "Test Credentials" tab is active, showing fields for "Request URL" (pre-filled with "https://api.dev.infoagent.com.au"), "Client Id" (masked with asterisks), and "Client Secret" (masked with asterisks). A "Verify" button is located below these fields. At the bottom of the window, there are three tabs: "Credentials", "Test Credentials" (selected), and "Options".

As per the production Credentials page, enter details as required but for Test Mode.

Options Tab

The Options tab is where you **Enable** the options required.

New Zealand options:



Click on the Options tab and fill in the following fields:

- 1. Credit Enquiry Options** – This option allows you to do a Driver Licence Check (New Zealand only) for the Client.
- 2. Security Enquiry Options:**
 - Tick the **Enable Security Enquiry** checkbox.
 - Tick the **Enable Security Monitoring** checkbox if required.
- 3. Security Enquiry Defaults** – Select the 'Default Product'. The reports are in order of complexity, for example the Basic report will include Plate, VIN, Chassis etc., whereas the 'Comprehensive Report Plus' includes everything that InfoAgent can provide.

The options are as follows:

- Basic,
- Rego,
- Rego plus Valuation,
- Standard,
- Standard plus PPSR,
- Comprehensive,
- Comprehensive Plus.

- 4. Valuation Options** – Defines the Valuation type to use for example Low, Average or High.

This option is available when requesting the 'Rego plus Valuation' and 'Comprehensive Plus' report and will show at the bottom of the report like the following screenshot:

Valuation

Low:	\$30,486.00
Average:	\$32,091.00
High:	\$35,300.00

Data provided by RedBook based on good condition and average kms travelled

Australian options:

Cost Centres

GLOBAL: Global Cost Centre
Global Cost Centre

GLOBAL

General

ABN Lookup

Adobe Sign

APLYID

ClickSend

Credit Sense

DocuSign

Equifax AU

GreenId

Illion Australia

Illion BankStatements

InfoAgent

RealAML

Secured Signing

SMS Fusion

Twilio

Zepto

Usage

Audit

Reports

Utilities

Does this Cost Centre define InfoAgent details?

☒ Use Service?

If you are not already registered at InfoAgent click the button to Sign Up.

Sign Up

Credit Enquiry Options.

☒ Enable Credit Enquiry?

Security Enquiry Options.

☒ Enable Security Enquiry?

☒ Enable Security Monitoring?

Security Enquiry Defaults.

Default Report: Standard

State: QLD

Vehicle Type: Car

Valuation Options.

Valuation: Average

Credentials Test Credentials **Options**

Click on the Options tab and fill in the following fields:

- 1. Credit Enquiry Options** – Leave **unticked** as this option is not available for AU databases.
- 2. Security Enquiry Options** - Tick the 'Enable Security Enquiry' checkbox.
- 3. Security Enquiry Defaults**
 - Select the **Default Product**. The reports are in order of complexity, for example the Basic report will include Plate, VIN, Chassis etc., whereas the 'Comprehensive Report Plus' includes everything that InfoAgent can provide.

The options are as follows:

 - Basic
 - Rego
 - Standard
 - Comprehensive
 - Comprehensive Plus
 - Select the default **State**.
 - Select the default **Vehicle Type** for example, Car, Motorbike or Heavy Vehicle.

- 4. Valuation Options – This** defines the Valuation type to use for example, Low, Average or High. This option is only available when requesting the Comprehensive Plus report and will show at the bottom of the report like the following screenshot:

Valuation	
Low:	\$30,486.00
Average:	\$32,091.00
High:	\$35,300.00
<i>Data provided by RedBook based on good condition and average kms travelled</i>	

More information on Cost Centres can be found within the finPOWER Connect Help pages.

INFOAGENT CREDIT ENQUIRY – DRIVER LICENCE CHECK

CREATING AN INFOAGENT CREDIT ENQUIRY

InfoAgent requests can be processed using the same form as other Credit Enquiries.

This can be accessed in the following ways:

- From the Client Menu - using the Menu option Client, **Credit Enquiry**.
- From the Client Form - using the Actions, **Credit Enquiry**.
- As an Item configured on a Workflow.

The image shows two side-by-side screenshots of the 'New Workflow Item' dialog box in a software application. Both windows have a title bar that says 'New Workflow Item' and standard Windows window controls (minimize, maximize, close).
The left window is titled 'Item Type' and contains the following fields and options:

- 'Specify the Workflow Item Type and details.'
 - 'Specify a Description and optionally, a Code for this Item.'
 - 'Description': A text box containing 'Credit Enquiry'.
 - 'Code': A text box containing 'CREDITENQUIRY'.
 - 'Short': A text box containing 'CREDITENQUIRY'.
 - 'Specify the Item Type.'
 - 'Item Type': A dropdown menu with 'Credit Enquiry' selected.
 - Four checkboxes:
 - ☐ Hide this Item in Summary Pages?
 - ☐ Hide this Item in Summary Pages when Complete?
 - ☐ Allow Users to flag this item as 'Not Applicable'?
 - ☐ Process the Workflow if this was the current Workflow Item?
 - 'Enter text or Wiki Notes to assist the User with actioning this Item.'
 - A large, empty text area for notes.
- Buttons at the bottom: 'Cancel', '< Back', 'Next >', and 'Finish'.

The right window is titled 'Credit Enquiry' and contains the following fields and options:

- 'Select the default Credit Bureau service to use.'
 - 'Select the Credit Bureau Service to use.'
 - 'Service': A dropdown menu with 'InfoAgent' selected.
 - A checkbox: ☐ Always perform an 'Individual' Enquiry for 'Organisation' type Clients?
- Buttons at the bottom: 'Cancel', '< Back', 'Next >', and 'Finish'.

- And via Scripting.

RUNNING THROUGH THE CREDIT ENQUIRY WIZARD

1. Select the **Service** and **Product** to use:

- Select the **Client**,
- Select the **Branch** to allocate costs to,
- Select 'InfoAgent' for the **Service** and,
- Select the **Product** – Driver Licence Check (New Zealand).

Credit Enquiry (Test Mode)

Service
Select the Service and Product to use and select a Client to enquire upon if required.

Optionally select the Client you wish to enquire upon. ⓘ

Client: C10203 Buffalo, Amelia
19 Marine Parade
Bluff Hill
Napier 4110

☐ Enquire on the Person Acting for this organisation?

Select the Branch to allocate costs to.

Branch: M Main Branch (Main Entity M)

Select the Credit Bureau Service to use.

Service: InfoAgent InfoAgent
This will be charged to Cost Centre GLOBAL, Global Cost Centres.

Select the Credit Bureau Product to use.

Product: Driver Licence Check (New Zealand)

Cancel < Back Next > Finish

Click **Next**.

2. Enter the details of the **Individual**:

- Enter the **Last Name**
- Enter the **Licence number** and **version** e.g., DE836549-692

Credit Enquiry (Test Mode)

Individual
Enter details of the Individual on whom this Credit Enquiry is to be performed.

Person's details.

Last Name: Buffalo

New Zealand Driver's Licence details. ⓘ

Licence No: DE836549-692

Cancel < Back Next > Finish

Click **Next**.

3. Credit Enquiry results

The resulting screenshot below shows the 'Driver Licence Check'.

Credit Enquiry (Test Mode)

Enquiry
Credit Enquiry results.

BUFFALO : DE836549-000
Driver Licence Check (New Zealand) - InfoAgent

Date: 27/04/2023 3:54pm (all dates shown in NZ time)
ID: 72ce75Vf7jFdBqa6KC7j

Request Data

Last Name: Buffalo
Licence Number: DE836549
Licence Version: 692
Description: NZ DL Check DE836549
Timestamp: 27/04/2023 3:54pm

Alerts

⚠ Licence has Conditions.

Licence Details

Licence Number: DE836549
Status: **Current**

Classes

Class	Status	Stage	Start Date	End Date
1. Car	Current	Full	14/10/2019	14/10/2029
6. Motorcycle	Current	Full	14/10/2019	14/10/2029

Conditions

Condition	Status	Start Date	End Date
B. Correcting lenses must be used while driving	Current	14/10/2019	

Endorsements

No Endorsements found.

This report was produced by finPOWER Connect version 4.0.2 using information retrieved from the InfoAgent service on 27/04/2023 3:54:44pm

Cancel < Back Next > Finish

Click **Finish**.

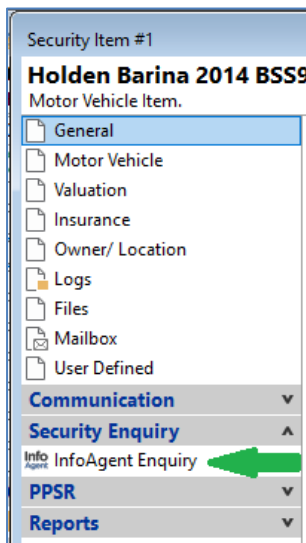
To review the report again, view it via the Client as a log which is where it will have been saved.

INFOAGENT SECURITY ENQUIRY

CREATING AN INFOAGENT SECURITY ENQUIRY

InfoAgent requests can be processed, using the same form as the other Security Enquiries. This can be accessed in the following ways:

- While adding a New Account, adding a New Security Item.
- Security Menu - using the Menu option Security, **Security Enquiry**.
- From the Security Enquiry Menu on the Security Statement, Security Item.



- As an Item configured on a Workflow.

New Workflow Item

Item Type
Specify the Workflow Item Type and details.

Specify a Description and optionally, a Code for this Item. ⓘ

Description:

Code:

Short:

Specify the Item Type.

Item Type:

☐ Hide this Item in Summary Pages?

☐ Hide this Item in Summary Pages when Complete?

☐ Allow Users to flag this item as 'Not Applicable'?

☐ Process the Workflow if this was the current Workflow Item?

Enter text or Wiki Notes to assist the User with actioning this Item. ⓘ

New Workflow Item

Security Enquiry
Select the default Security Enquiry service to use.

Select the Security Enquiry Service to use.

Service:

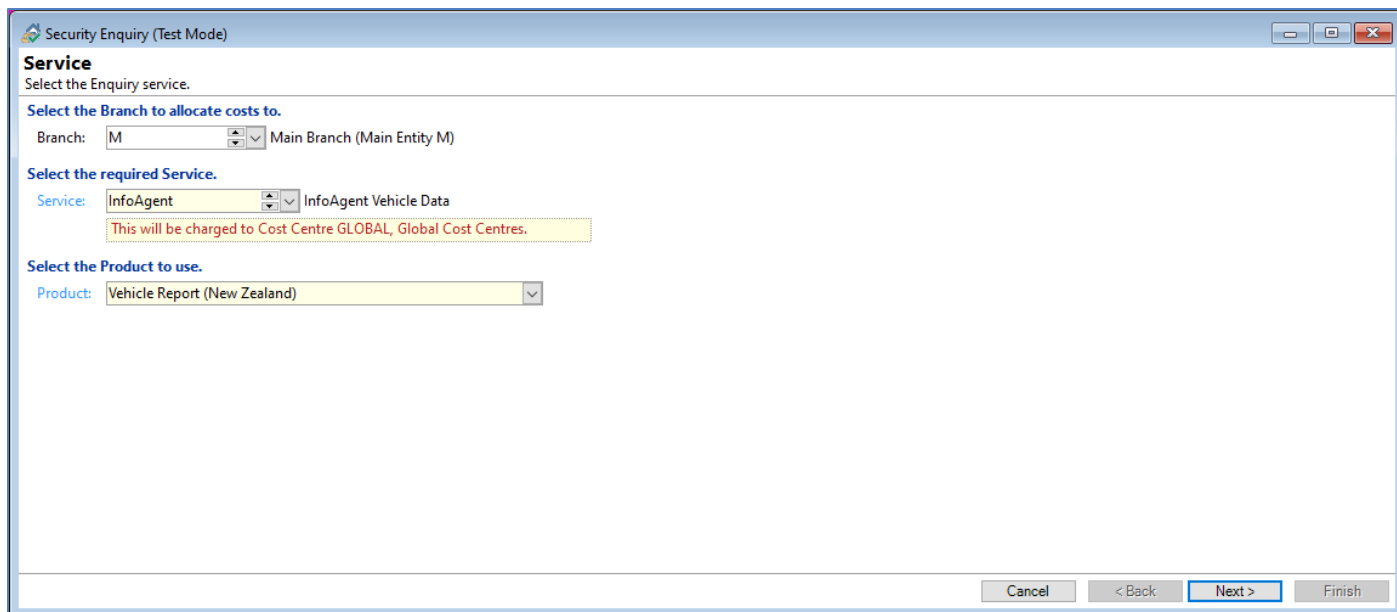
- And via Scripting.

RUNNING THROUGH THE SECURITY ENQUIRY WIZARD

Vehicle Report

1. Select the Enquiry Service:

- Select the **Branch** to allocate costs to.
- Select 'InfoAgent' for the **Service** and
- Select the **Product – Vehicle Report**.



Security Enquiry (Test Mode)

Service
Select the Enquiry service.

Select the Branch to allocate costs to.
Branch: M Main Branch (Main Entity M)

Select the required Service.
Service: InfoAgent InfoAgent Vehicle Data
This will be charged to Cost Centre GLOBAL, Global Cost Centres.

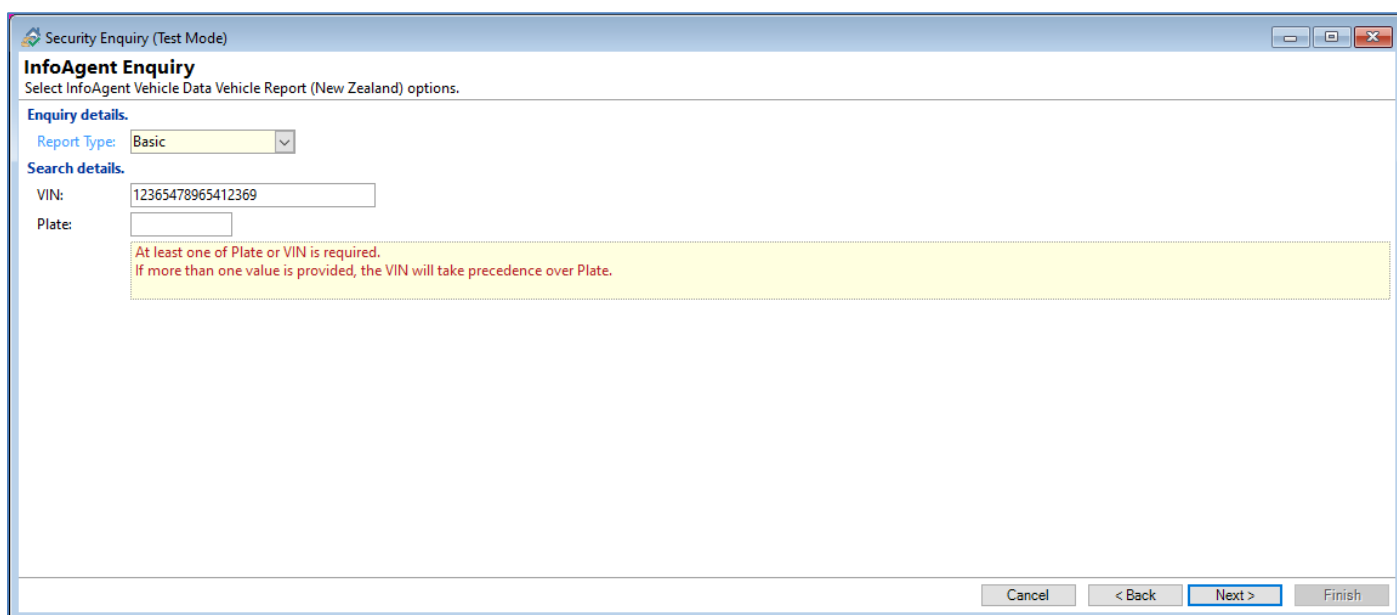
Select the Product to use.
Product: Vehicle Report (New Zealand)

Cancel < Back Next > Finish

Click **Next** to move to the next page.

2. Select InfoAgent Vehicle Data Vehicle Report (New Zealand) options:

- Select the **Report Type** required e.g., Basic.



Security Enquiry (Test Mode)

InfoAgent Enquiry
Select InfoAgent Vehicle Data Vehicle Report (New Zealand) options.

Enquiry details.
Report Type: Basic

Search details.
VIN: 12365478965412369
Plate:

At least one of Plate or VIN is required.
If more than one value is provided, the VIN will take precedence over Plate.

Cancel < Back Next > Finish

- Enter the VIN or Plate details of the Vehicle. If both are entered, VIN takes precedence over Plate.

Click **Next**.

Select InfoAgent Vehicle Data Vehicle Report (Australian) options:

- Select the **Report Type** required e.g., Basic.

The screenshot shows a web application window titled "Security Enquiry (Test Mode)". Inside, there's a section titled "InfoAgent Enquiry" with the instruction "Select InfoAgent Vehicle Data Vehicle Report (Australia) options." Below this, there are two sections: "Enquiry details" and "Search details".

Enquiry details: A dropdown menu for "Report Type" is set to "Standard".

Search details: There are input fields for "VIN:", "Chassis:", "Plate:", "State:", and "Vehicle Type:". The "VIN:" field contains "12345678996321478". The "State:" dropdown is set to "QLD". The "Vehicle Type:" dropdown is set to "None".

A yellow warning box contains the text: "At least one of Plate/State, VIN, or Chassis is required. If more than one value is provided, the VIN, then Chassis will take precedence over Plate/State."

At the bottom right, there are four buttons: "Cancel", "< Back", "Next >", and "Finish". The "Next >" button is highlighted with a blue border.

- Enter the **VIN, Chassis** or **Plate and State** details of the Vehicle.
If more than one is entered, VIN takes precedence over Plate and State.
Please note; if a Plate is entered then a State must also be selected. If the wrong State is selected for the Plate, then it is likely the Vehicle will not be found.
- If you know the **Vehicle Type**, then select it from the dropdown list or select 'None' if you do not know.

Click **Next**.

Report Results

Some examples of the Report are shown as follows:

- **New Zealand Basic** report

Security Enquiry (Test Mode)

Enquiry

Security Enquiry results.

58UFR - 1989 SUZUKI VS700GGLFH Motorcycle

Basic Vehicle Report (New Zealand) - InfoAgent Vehicle Data

Enquiry Date: 21/06/2022 12:08pm
Report Type: Basic
Plate: 58UFR
InfoAgent ID:
Result: 1 vehicle found

Vehicle Information

Plate: 58UFR
VIN:
Engine Number: 118159

Details

Year:	1989	Engine	
Make:	SUZUKI	Fuel Type:	Petrol
Model:	VS700GGLFH	CC Rating:	700
Body Style:	Motorcycle		
Colour:	BLUE		
Vehicle Type:	Motorcycle		

Plate History

Date	Status	Type	Plate
29/04/2000	Active	Standard	58UFR
21/04/1989	Inactive		13RWF

Odometer History

No Odometer History found.

Ownership Details

No Ownership Details found.

This report was produced by finPOWER Connect version 3.4.4 using information retrieved from the InfoAgent Vehicle Data service on 21/06/2022 12:08:44pm

Cancel
< Back
Next >
Finish

- **Australian Standard** report

Security Enquiry (Test Mode)

Enquiry
Security Enquiry results.

TE02HP - 2010 NISSAN TIIDA SEDAN
Standard Vehicle Report (Australia) - InfoAgent Vehicle Data

Enquiry Date: 22/06/2022 8:54am
Report Type: Standard
Plate: TE02HP
State: NSW
InfoAgent ID:
Result: 1 vehicle(s) found

Alerts
Registration expires on 19/07/2022.

Vehicle Information

Plate: TE02HP
State: NSW
VIN:

Details

Year: 2010	Engine
Make: NISSAN	Engine: 1.8L PET MR18DE I4 16v DOHC VVT MPFI (93kW)
Model: TIIDA	Fuel Type: PETROL
Body Type: SEDAN	CC Rating: 1797
Colour: WHITE	Power: 93kW
Vehicle Type: CAR / SMALL PASSENGER VEHICLE	Engine Type: MR18DE
Compliance Plate: 2010-10	Engine Number:

Registration

Status: Registered
Expiry Date: 19/07/2022

Stolen Information
No Stolen information found.

Written Off Information
No Written Off information found.

This report was produced by finPOWER Connect version 3.4.4 using information retrieved from the InfoAgent Vehicle Data service on 22/06/2022 8:54:08am

Cancel < Back Next > Finish

The slight differences in fields displayed in the New Zealand and Australian reports are due to the differing information that is recorded in the countries.

Additionally, the more comprehensive the report that is selected, the more information that will appear within the report.

You may want to speak directly with InfoAgent about the different reports, the information that is included and the associated costs. For more information, please go to the following 'InfoAgent' sites:

- New Zealand <https://www.infoagent.co.nz/>
- Australia <https://www.infoagent.com.au/>

Or view Appendix A further down the document.

Previous Vehicle Report (New Zealand)

Within New Zealand databases, there is an option to search on Previous Vehicle Reports.

Security Enquiry (Test Mode)

Service
Select the Enquiry service.

Select the Branch to allocate costs to.
Branch: M Main Branch (Main Entity M)

Select the required Service.
Service: InfoAgent InfoAgent Vehicle Data
This will be charged to Cost Centre GLOBAL, Global Cost Centres.

Select the Product to use.
Product: Previous Vehicle Report (New Zealand)

Cancel < Back Next > Finish

This will show any previous reports generated in the last three months, if there is one that matches the search criteria.

Security Enquiry (Test Mode)

InfoAgent Enquiry
Select InfoAgent Vehicle Data Previous Vehicle Report (New Zealand) options.

Retrieve a Previous Report by Reference.
Reference:

Search for a Previous Report.
Search Term: 14TFQ
Report Type: Any

One of Reference or Search Term is required. Search Term should be a Plate, VIN, or Chassis number. Report Type is optional, but can be used with Search Term. For Searches, the most recent report generated within the last three months will be returned, if there is one that matches the search criteria.

Cancel < Back Next > Finish

There are two options to search by which include:

- **Reference** or
 - **Search Term** – which includes the VIN, Plate or Chassis number.
- The **Report type** is optional and may help with the search Criteria.

The **Reference** or **InfoAgent Id** (another name for the Reference) can be found in the following places:

- Reference – viewed on the Service Log Details on the General page.

Service Log #29231

Service Log Details
Security Enquiry Service Log.

General

Request details.

Service Type: SecurityEnquiry ☒ Test Mode?
 Service Id: InfoAgent
 Product Class: MotorVehicle
 Product Id: Vehicle Report (New Zealand)
 Cost Centre: GLOBAL ☒ Global Cost Centres
 Enquiry Ref: 14TFQ
 Version: 1.0.0
 Options: STANDARD
 Reference: kRli0ogkmhmYSyQXNWy8
 Status: Success

Charge details.
☒ Chargeable?

Response details.
 Status: Not Applicable
 Reference: kRli0ogkmhmYSyQXNWy8

Originator details.
 Windows User: INTERSOFTNZ\AC
 Machine Name: AC-DELL

- InfoAgent Id – viewed on the Security Item log or Service Log, Security Enquiry page.

Service Log #29231

Service Log Details
Security Enquiry Service Log.

Security Enquiry

14TFQ - 1984 HONDA XL500R Motorcycle
New Zealand Standard Vehicle Report - InfoAgent Vehicle Data

Enquiry Date: 26/04/2023 12:07pm
 Report Type: Standard
 Report Selection: By Plate
 Plate: 14TFQ
 InfoAgent ID: kRli0ogkmhmYSy
 Result: 1 vehicle found

Alerts

- ❗ Vehicle has been previously de-registered
- ⚠ Licence ('Rego') has expired
- ⚠ Vehicle has exemption licence
- ⚠ Warrant of Fitness (WoF) has expired

Vehicle Information

Plate: 14TFQ
 Chassis: PD025006538
 Engine Number: PD02E5016455

UPDATING THE SECURITY ITEM FROM THE REPORT

If the enquiry has been created from either of the following places:

- Security Statement, Security Item, Security Enquiry,
- New Account, adding a New Security Item, Security Enquiry,

the report is displayed, and a 'Next' button will be available instead of only the 'Finish' button; click Next.

This will show a comparison of the details you have entered for the Security Item and those that have been returned.

Security Enquiry (Test Mode)

Update Differences
Select differences to update on the Security Item

20 differences found.

Item	Security Item	Enquiry Result	Use	Updated
Plate Number	ABC	UP3374	<input checked="" type="checkbox"/>	UP3374
VIN	95125874123698741	7A8DH1E0796001854	<input checked="" type="checkbox"/>	7A8DH1E0796001854
Chassis Number		HU12-001854	<input checked="" type="checkbox"/>	HU12-001854
Engine Number		SR20-001777A	<input checked="" type="checkbox"/>	SR20-001777A
Country Of Origin	New Zealand	Japan	<input checked="" type="checkbox"/>	Japan
Vehicle Type	Car	Passenger Car/Van	<input checked="" type="checkbox"/>	Passenger Car/Van
Body Style	SUV	Sedan	<input checked="" type="checkbox"/>	Sedan
Make	Toyota	NISSAN	<input checked="" type="checkbox"/>	NISSAN
Model	Allion	BLUEBIRD	<input checked="" type="checkbox"/>	BLUEBIRD
Model Sub		SSS X II	<input checked="" type="checkbox"/>	SSS X II
Year	2010	1989	<input checked="" type="checkbox"/>	1989
Colour	Silver	GREEN	<input checked="" type="checkbox"/>	GREEN
CC Rating		1998	<input checked="" type="checkbox"/>	1998
Fuel Type		Petrol	<input checked="" type="checkbox"/>	Petrol
Odometer	0	161.225	<input checked="" type="checkbox"/>	161.225
WOF Last		20/11/2016	<input checked="" type="checkbox"/>	20/11/2016
WOF Expiry		20/05/2017	<input checked="" type="checkbox"/>	20/05/2017
Registration Last		23/11/2016	<input checked="" type="checkbox"/>	23/11/2016
Registration Expiry		20/01/2022	<input checked="" type="checkbox"/>	20/01/2022
Owner			<input type="checkbox"/>	

Cancel < Back Next > Finish

Click the 'Use' checkbox to update any of the relevant lines for example, update the colour of the Vehicle from Silver to Green.

Please note: if you do not update the Security Item when the above report is run, the opportunity to import the information from the report will not be available again.

INFOAGENT MONITORING

Monitoring functionality has been added to the InfoAgent Security Enquiry service.

This allows you to send details of Motor Vehicles you want InfoAgent to monitor; for things such as plate changes, ownership changes, reported stolen and deregistered/written off. Alerts will be emailed to the address stored in the InfoAgent Account.

ACCESSING MONITORING OPTIONS – SECURITY STATEMENT ITEM

finPOWER Connect includes options to start and stop monitoring vehicles, as well as holding vehicles from being monitored by InfoAgent.

On the Security Statement form, Security Items page, the summary page includes the section **Monitoring** which contains the following buttons:

- Hold Monitoring
- Clear Hold
- Start Monitoring via InfoAgent

The screenshot displays the 'Security Statements' window in the finPOWER Connect application. The main title is 'SS00020: TOYOTA COROLLA 1995 UP2774 GREEN'. Below the title, there's a 'Registered' status indicator. The left sidebar contains a navigation menu with options like 'Key Details', 'General', 'Security Items', 'Accounts & Clients', 'Logs', 'Files', 'User Defined', 'PPSR', 'PPSR Transactions', 'Audit', 'Communication', 'Add Log', 'PPSR', 'View Financing Statement', 'Financing Statement Versions', 'Register Financing Statement', 'Amend Financing Statement', 'Renew Financing Statement', 'Discharge Financing Statement', 'MotorWeb', 'Reports', 'Print', 'List', 'Utilities', and 'Export'.

The main content area is titled 'Security Items.' and features a table with the following columns: Security Type, Trade-In, Serial No., Description, Value, Security Value, Residual, and Cover. The table contains one row for 'TOYOTA COROLLA 1995 UP2774 GREEN' with values of 0.00 for Value, Security Value, Residual, and Cover.

Below the table, there's a 'Summary' section with the following details:

- Description: TOYOTA COROLLA 1995 UP2774 GREEN
- Type: MV, Motor Vehicle
- Class: Goods - Motor Vehicle
- Reference:
- Motor Vehicle Identification details:
 - Reg No: UP2774
 - VIN: JT772AEA108011395
 - Chassis:
 - Manufacturer No:
 - Engine No: 4A-FE-923273
- Other details:
 - Vehicle Type: Passenger Car/Van
 - Body Style: Wagon
 - Make: TOYOTA
 - Model: COROLLA
 - Colour: GREEN
 - Year: 1995

At the bottom of the summary section is a 'Valuation' dropdown menu.

On the right side of the interface, there are several sections:

- Warnings:** No warnings.
- Monitoring:** Not currently monitored. Includes buttons for 'Hold Monitoring' and 'Start Monitoring via InfoAgent'.
- Enquiries:** A table with columns: Created, User, Service, Product, and Differences. It shows one enquiry created on 26/04/2023 at 15:10 by ADMIN, for the product 'Vehicle Report (New Zealand) (STANDARD)'.
- Insurance:** No Insurance details recorded for this item.
- Owner and Location:** No Owner or Location details recorded for this item.

- Stop Monitoring

The screenshot displays the 'Security Statements' application window. The main title is 'SS00020: TOYOTA COROLLA 1995 UP2774 GREEN'. Below this, a table lists 'Security Items' with columns for Security Type, Trade-In, Serial No., Description, Value, Security Value, Residual, and Cover. The table shows one item: a Motor Vehicle with Serial No. UP2774, Description TOYOTA COROLLA 1995 UP2774 GREEN, and all monetary values at 0.00.

The left sidebar contains a navigation menu with categories like Key Details, General, Security Items, Accounts & Clients, Logs, Files, User Defined, PPSR, PPSR Transactions, Audit, Communication, Add Log, PPSR, View Financing Statement, Financing Statement Versions, Register Financing Statement, Amend Financing Statement, Renew Financing Statement, Discharge Financing Statement, MotorWeb, Reports, Print, List, Utilities, and Export.

The main content area is divided into several sections:

- Summary:** Description: TOYOTA COROLLA 1995 UP2774 GREEN; Type: MV, Motor Vehicle; Class: Goods - Motor Vehicle; Reference: (empty).
- Motor Vehicle Identification details:** Reg No: UP2774; VIN: JT772AEA108011395; Chassis: (empty); Manufacturer No: (empty); Engine No: 4A-FE-923273.
- Other details:** Vehicle Type: Passenger Car/Van; Body Style: Wagon; Make: TOYOTA; Model: COROLLA; Colour: GREEN; Year: 1995.
- Valuation:** (empty section).
- Warnings:** Monitor Date: 26/04/2023. A message states: 'Motor Vehicle is currently being monitored by InfoAgent.' with a 'Stop Monitoring' button.
- Enquiries:** A table with columns: Created, User, Service, Product, Differences. It shows one entry: 26/04/2023 15:10, ADMIN, InfoAgent, Vehicle Report (New Zealand) (STANDARD), and a 'View' link.
- Insurance:** A message states: 'No Insurance details recorded for this item.'
- Owner and Location:** A message states: 'No Owner or Location details recorded for this item.'

Note, to start monitoring a Vehicle, it should not be a Trade-In, Defunct and the Security Statement must have a related 'Open' or 'Closed Pending' Account.

ACCESSING MONITORING OPTIONS – SECURITY MENU OPTION

An 'InfoAgent Monitoring' wizard is available. This wizard has options to:

Show existing monitored Vehicles.

The list displayed will check the "Stop Monitor" column for those Vehicles that are no longer valid to be monitored e.g., where the related Loan has been Closed.

Show Vehicles not currently monitored.

This provides an easy way to quickly monitor all vehicles not currently monitored.

MONITORING TYPE PERMISSION KEYS

The following Permission Keys have been added:

- SecurityItem.Monitoring.Hold - User can hold an Item from Monitoring.
- SecurityItem.Monitoring.Start - User can start Monitoring an Item.
- SecurityItem.Monitoring.Stop - User can stop Monitoring an Item.

APPENDIX A

INFOAGENT NEW ZEALAND – PRODUCT MATRIX

InfoAgent New Zealand - Product Matrix							
Product	Basic Report	Rego Report	Rego + Valuation	Standard Report	Standard + PPSR	Comprehensive Report	Comprehensive Report Plus
Plate	✓	✓	✓	✓	✓	✓	✓
VIN	✓	✓	✓	✓	✓	✓	✓
Chassis	✓	✓	✓	✓	✓	✓	✓
Engine number	✓	✓	✓	✓	✓	✓	✓
Year	✓	✓	✓	✓	✓	✓	✓
Make	✓	✓	✓	✓	✓	✓	✓
Model	✓	✓	✓	✓	✓	✓	✓
Submodel	✓	✓	✓	✓	✓	✓	✓
Body style	✓	✓	✓	✓	✓	✓	✓
Vehicle type	✓	✓	✓	✓	✓	✓	✓
Colour	✓	✓	✓	✓	✓	✓	✓
Number of seats	✓	✓	✓	✓	✓	✓	✓
Number of doors						✓	✓
CC rating	✓	✓	✓	✓	✓	✓	✓
Drive						✓	✓
GVM				✓	✓	✓	✓
Number of axles				✓	✓	✓	✓
Fuel type	✓	✓	✓	✓	✓	✓	✓
Assembly type		✓	✓	✓	✓	✓	✓
Country of origin		✓	✓	✓	✓	✓	✓
Vehicle usage				✓	✓	✓	✓
Imported damaged				✓	✓	✓	✓
Reported stolen				✓	✓	✓	✓
Subject to RUC		✓	✓	✓	✓	✓	✓
Subject to WoF		✓	✓	✓	✓	✓	✓
Subject to CoF		✓	✓	✓	✓	✓	✓
Licence type		✓	✓	✓	✓	✓	✓
Licence issue date		✓	✓	✓	✓	✓	✓
Licence expiry date		✓	✓	✓	✓	✓	✓
Registration status		✓	✓	✓	✓	✓	✓
Date of last registration		✓	✓	✓	✓	✓	✓
Cause of last registration		✓	✓	✓	✓	✓	✓

Previous country of registration		✓	✓	✓	✓	✓	✓
Date of first NZ registration		✓	✓	✓	✓	✓	✓
Registered overseas		✓	✓	✓	✓	✓	✓
Number of owners				✓	✓	✓	✓
Current ownership details				✓	✓	✓	✓
Historical ownership details						✓	✓
RUC issue date						✓	✓
RUC start distance						✓	✓
RUC end distance						✓	✓
WoF expiry date		✓	✓	✓	✓	✓	✓
WoF latest inspection result		✓	✓	✓	✓	✓	✓
WoF issue date		✓	✓	✓	✓	✓	✓
Reliable odometer				✓	✓	✓	✓
Latest odometer reading		✓	✓	✓	✓	✓	✓
Historical odometer readings						✓	✓
Flood/fire/written off						✓	✓
Fuel economy	✓	✓	✓	✓	✓	✓	✓
Safety rating	✓	✓	✓	✓	✓	✓	✓
Co2 emissions	✓	✓	✓	✓	✓	✓	✓
Clean car discount	✓	✓	✓	✓	✓	✓	✓
PPSR security number					Current plate only	Current & past plates	Current & past plates
PPSR debtor details					Current plate only	Current & past plates	Current & past plates
PPSR secured party details					Current plate only	Current & past plates	Current & past plates
Valuation low			✓				✓
Valuation average			✓				✓
Valuation high			✓				✓

INFOAGENT AUSTRALIA – PRODUCT MATRIX

InfoAgent Data Services Australia - Product Matrix

Product	Basic Report	Rego Report	Standard Report	PPSR Report	Comprehensive Report	Comprehensive Report Plus
Plate	✓	✓	✓	✓	✓	✓
State	✓	✓	✓	✓	✓	✓
VIN	✓	✓	✓	✓	✓	✓
Make	✓	✓	✓	✓	✓	✓
Model	✓	✓	✓	✓	✓	✓
Year	✓	✓	✓	✓	✓	✓
Compliance plate date	✓	✓	✓	✓	✓	✓
Colour	✓	✓	✓	✓	✓	✓
Body type	✓	✓	✓	✓	✓	✓
Vehicle type				✓	✓	✓
Engine number	✓	✓	✓	✓	✓	✓
Fuel type	✓	✓	✓		✓	✓
CC rating	✓	✓	✓		✓	✓
Engine details		✓	✓		✓	✓
Power (kw)		✓	✓		✓	✓
No of doors					✓	✓
Cylinders					✓	✓
Drive type					✓	✓
Country of origin					✓	✓
Date range built					✓	✓
Power to weight					✓	✓
Rego status		✓	✓	✓	✓	✓
Rego expiry		✓	✓	✓	✓	✓
Written off status			✓	✓	✓	✓
Stolen status			✓	✓	✓	✓
Money owing yes/no				✓	✓	✓
Registration details				✓	✓	✓
Secured party details				✓	✓	✓
Valuation low						✓
Valuation average						✓
Valuation high						✓