



PPSR NZ

Obtaining Credentials and PPSR Installation Guide

Version 1.00

30th August 2023

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DISCLAIMER

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

This document is for informational purposes only. 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 changes may affect the relevance of the Contents.

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REVISION HISTORY

Date	Version	By	Details
30/08/2023	1.00	AC	Created

OVERVIEW

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

SUMMARY

LICENCE REQUIREMENTS

- Securities Register.
- PPSR Interface.
- Security Enquiry

CONFIGURATION

MBIE - OBTAINING A REALME LOGIN

If you are currently using PPSR then you should already have 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:

- The following process is different to how MBIE credentials were previously obtained.
- 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 using your RealMe log into the site.

API.BUSINESS.GOV.T.NZ

Home Explore APIs Login

Getting Started

Follow these simple steps to get up and running

- 1
[Explore](#) the list of APIs and find different services that you'd like to use in your own applications. Read the technical documentation to find out how they operate.
- 2
Log in and request subscription from the API's details screen. Our support team will confirm whether we have all the information we require, including a signed [API Access Agreement](#), and will grant access within one working day.
- 3
As a logged in user you can manage your test (sandbox) and production environment API access keys. Use the sandbox key and sandbox endpoints in your software development.
- 4
When you've completed testing, simply use your production keys to access the live services.

Getting Started
Explore APIs

Support
Contact Us

MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT
HONORABLE MEMBERS: JULIE SIMMONDS

Te Kaitiaki
New Zealand Government

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3. Enter your Account details:

API.BUSINESS.GOV.T.NZ
Logout

Account Creation

Please provide details below to create your account

First Name
Please enter your first name

Last Name
Please enter your last name

Email
Please enter your email address


Organisation (Optional)
Please enter your organisation


Contact Number (Optional)
Please enter your contact number

Submit
Cancel

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Support

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And click 'Submit' once all the fields have been entered.


4. Click on 'Explore APIs'

API.BUSINESS.GOV.T.NZ
Home
Explore APIs
My Subscriptions
My Applications
Support
Reports
Profile
Logout

Welcome


Welcome to the Ministry of Business, Innovation, and Employment (MBIE) API home page.
Here you'll find a diverse range of APIs for connecting directly to various government services and information sources.

Explore APIs




Getting Started

Find out how to discover, subscribe and start using our APIs in your applications.




Explore APIs

Browse our APIs and find the documentation you need to integrate with our services.



Support

Get assistance from our support team and get other information about working with the APIs.





Stay up to date

View the latest announcements and notifications about APIs.

Getting Started
Support

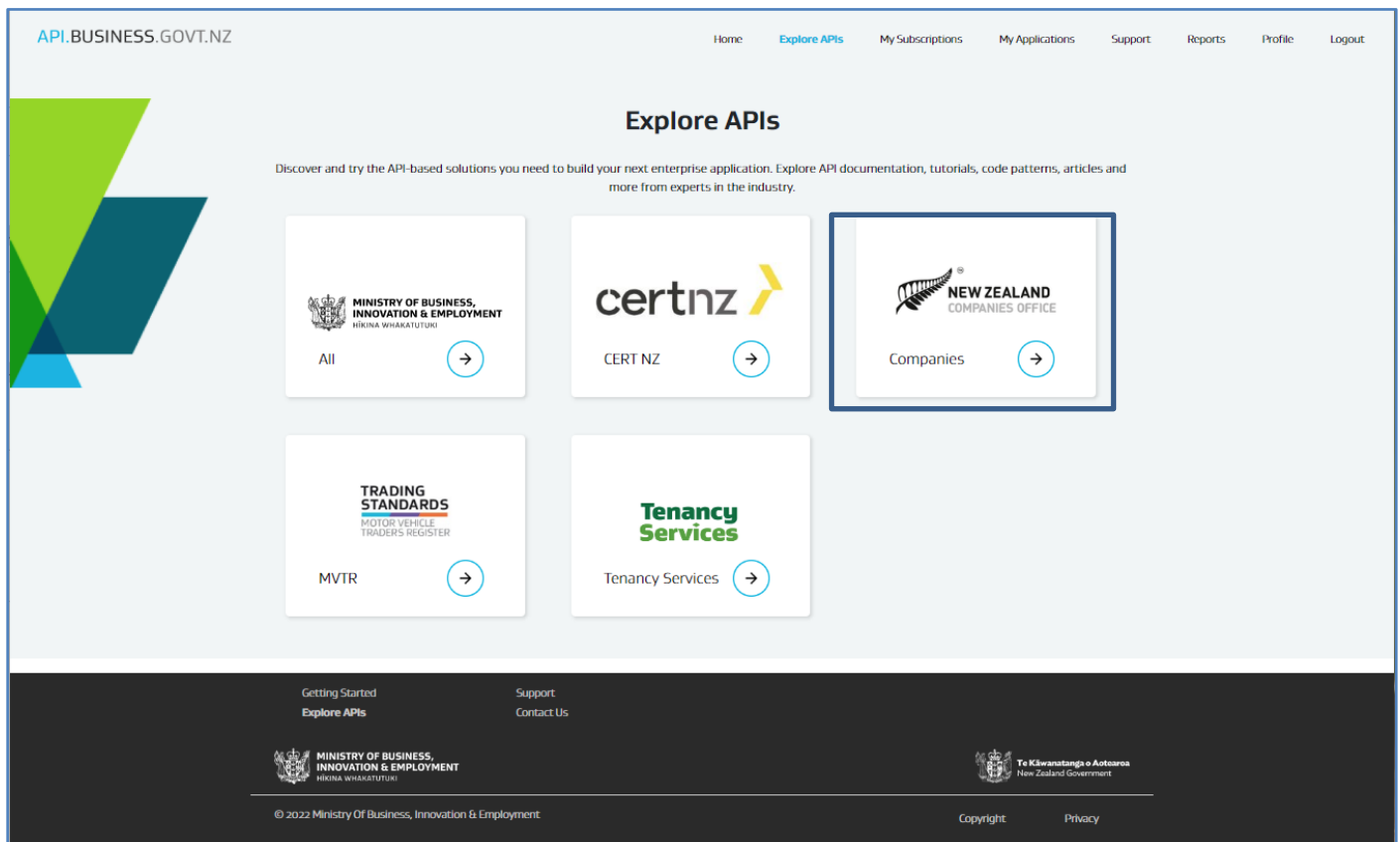
Explore APIs
Contact Us


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5. Click 'New Zealand Companies Office'.




API.BUSINESS.GOV.T.NZ

Home Explore APIs My Subscriptions My Applications Support Reports Profile Logout


Explore APIs

Discover and try the API-based solutions you need to build your next enterprise application. Explore API documentation, tutorials, code patterns, articles and more from experts in the industry.




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New Zealand Government

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6. Click 'PPSR – v2'

PPSR - v2

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 a...

And then 'PPSR', which is in small blue writing.

API.BUSINESS.GOV.T.NZ

Home Explore APIs My Subscriptions My Applications Support Reports Profile Logout

API operations

Search and view the list of API operations below. Click on a tag name to show all the related operations that are available.

Search operations Group by tag ☒

01. Financing Statements

02. Reference Data

03. Secured Party

04. Users

05. Customer Organisations

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 'Subscribe' button will appear, which you need to click.

API.BUSINESS.GOV.T.NZ

Home Explore APIs My Subscriptions My Applications Support Reports Profile Logout

PPSR

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

[Subscribe](#)

APIs

This product contains the following API(s). Click an API name to view details.

Search APIs

Name	Description
PPSR - v2	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 a...

My Subscriptions

Your list of existing product subscriptions.

You don't have subscriptions yet.

7. Clicking the 'Subscribe' button took me back to the Login screen; you may need to Login again. This will then take you straight to the following page:

8. Leave the 'Method of Subscription' as 'Subscription key'. Do NOT select any other option. Click 'Create'.
9. Once you have completed the steps in #9, click on 'My Subscriptions', shown at the top of the page. You will see the page as follows with the State set to 'Submitted':

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			

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.

10. Enter the Primary Key into Global Settings.

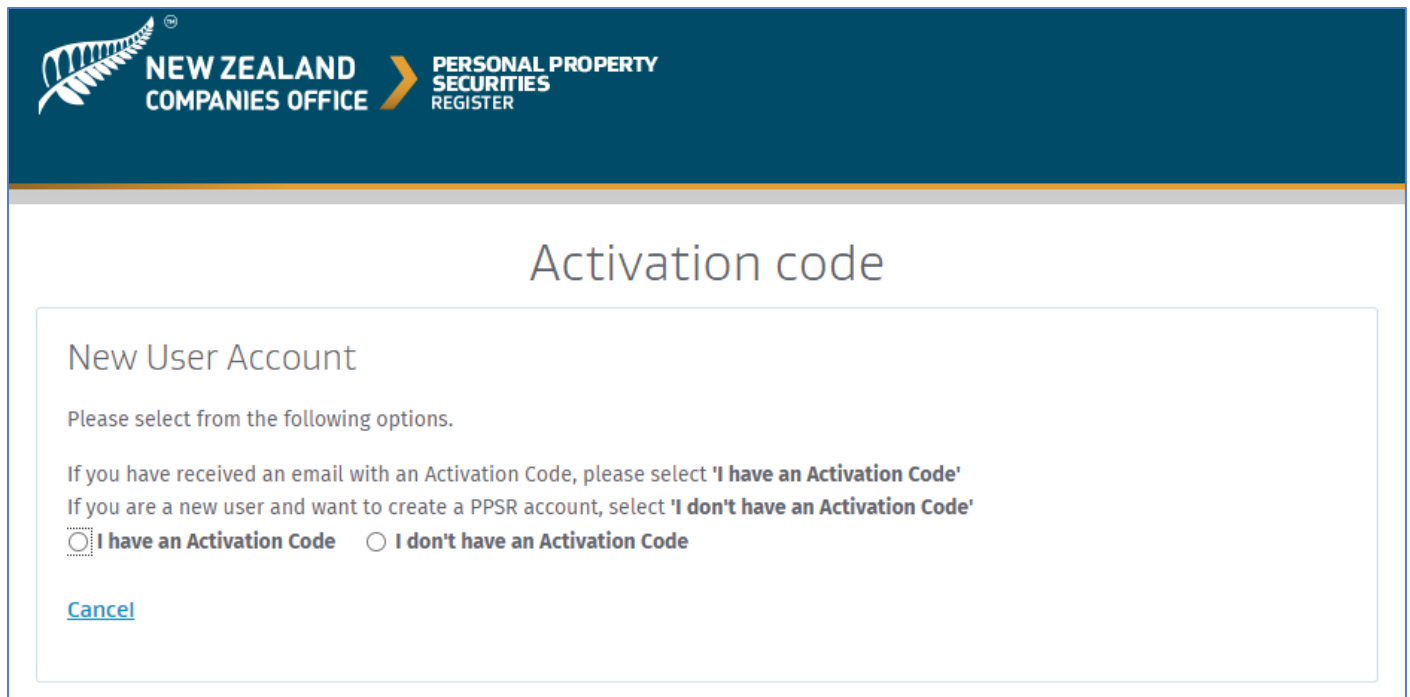
Please Note: ONLY use the **Sandbox** credentials while in **Test** mode.

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:



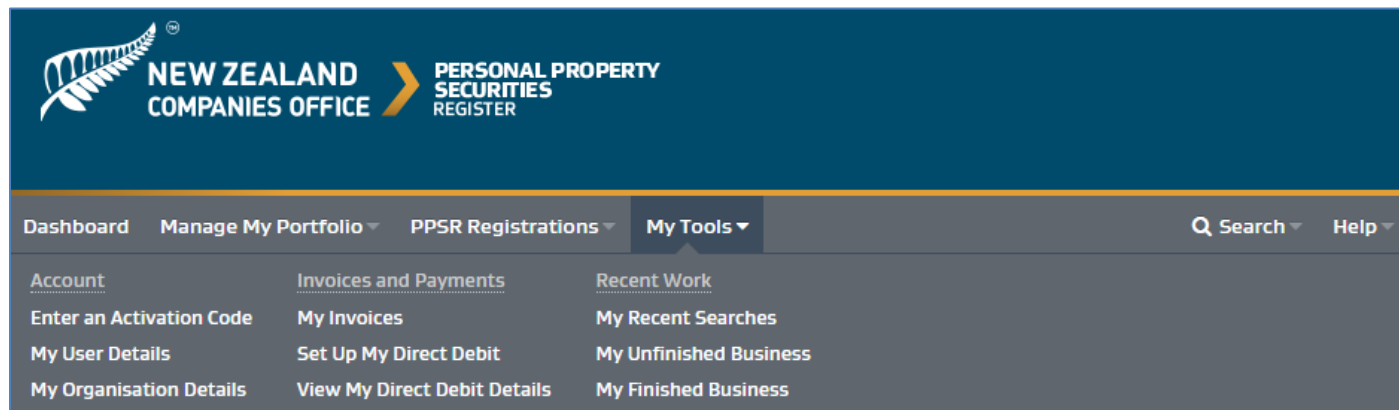
The screenshot shows the 'Activation code' screen of the New Zealand Companies Office Personal Property Securities Register. It features a dark blue header with the logo and text. The main content area is white and contains a form titled 'New User Account'. The form asks the user to select from two options: 'I have an Activation Code' (selected with a radio button) and 'I don't have an Activation Code' (unselected). There is a 'Cancel' link at the bottom left of the form.

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.
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'.



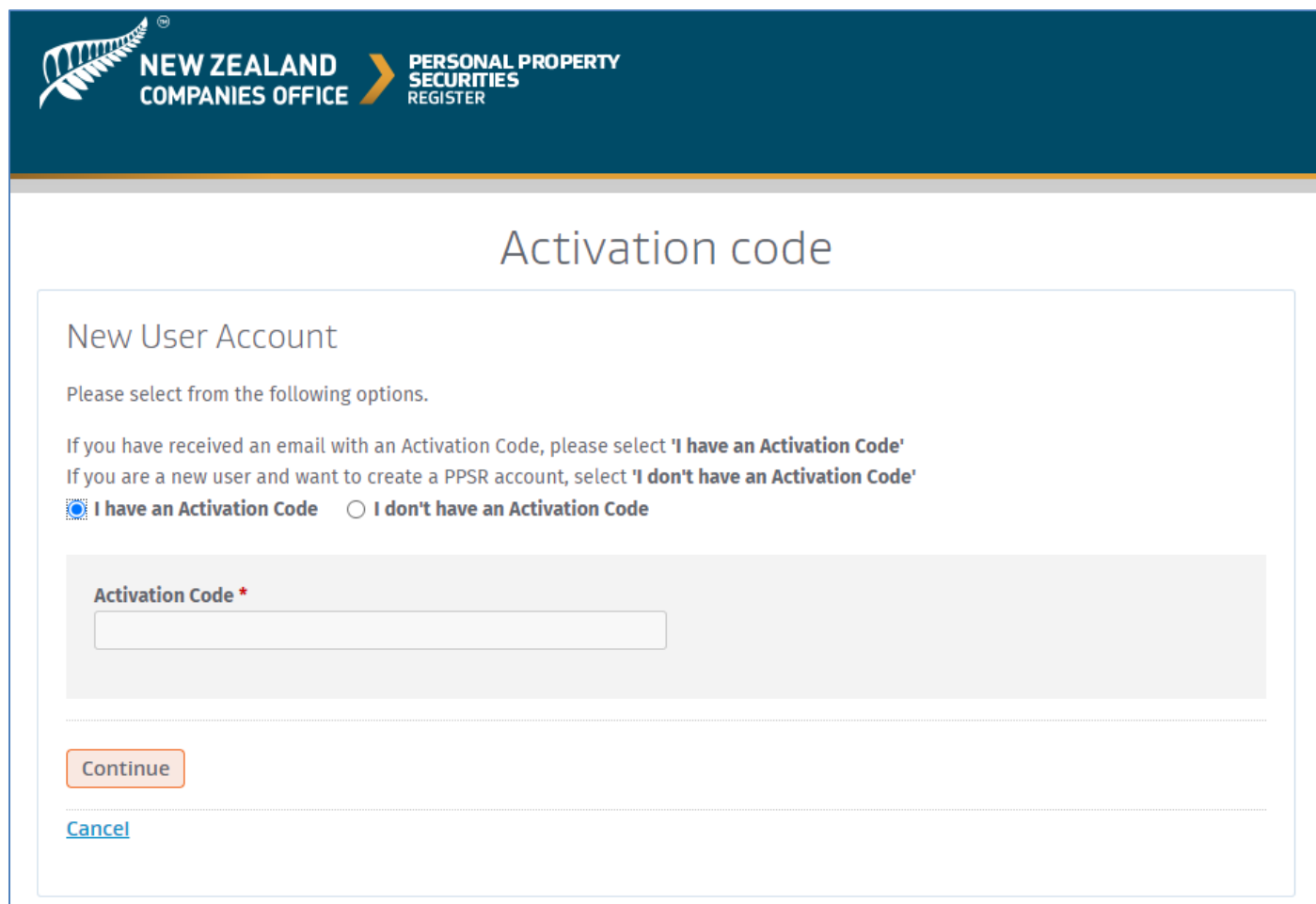
2. Scroll down the page until you find the button 'Add organisation user' and click on it.
3. You will need to fill in the following:
 - a. User details including whether or not they are an Admin User,
 - b. Contact Email and Phone number,
 - c. Physical and Postal Address.
4. When finished click the '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.



The screenshot shows the 'Activation code' page for a 'New User Account'. The header features the New Zealand Companies Office and Personal Property Securities Register logos. The main heading is 'Activation code'. Below it, the section is titled 'New User Account'. The instructions state: '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'**'. There are two radio buttons: 'I have an Activation Code' (selected) and 'I don't have an Activation Code'. Below this is a text input field labeled 'Activation Code *'. At the bottom, there is an orange 'Continue' button and a blue 'Cancel' link.

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)

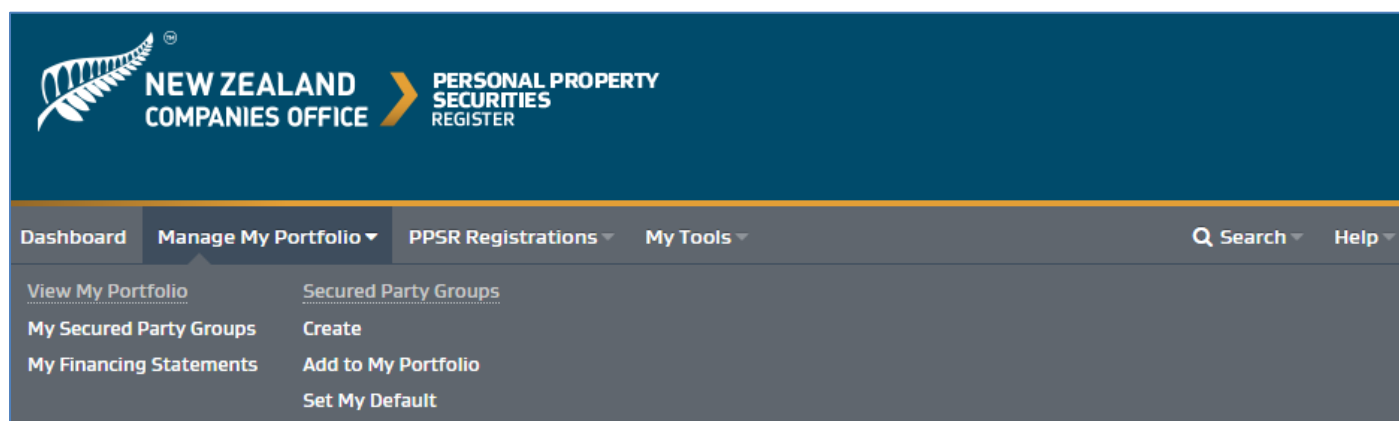
SPG Overview

An SPG contains all of the important information about the Secured Party in a PPSR Registration, including email and postal address. The Account holder can create multiple SPG's; the account holder and SPG are often the same person or from the same organisation, although they don't have to be. For example, a Lawyer could have a PPSR account they use to create registrations on behalf of their clients, whose details would be contained in different SPGs.

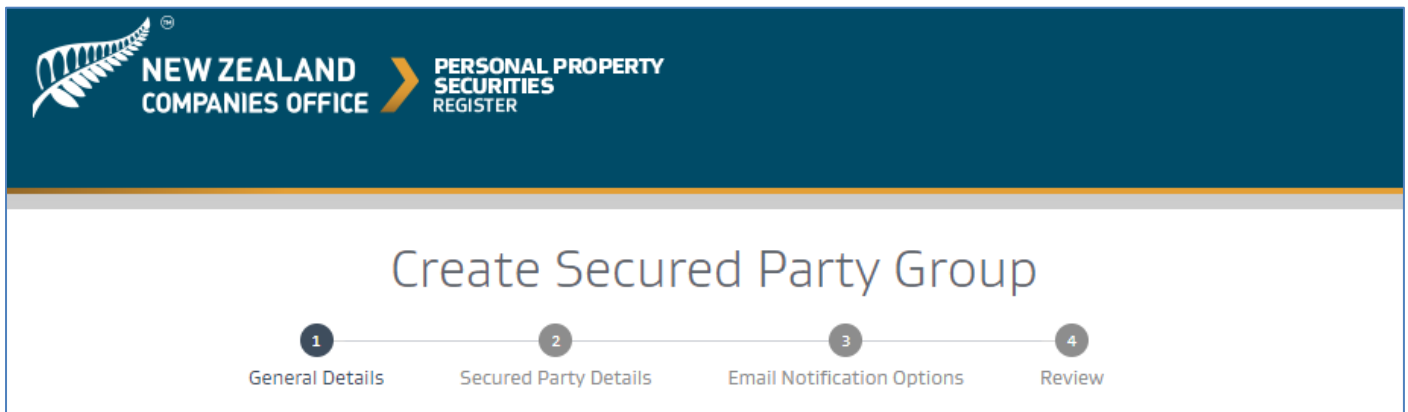
SPG Configuration

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:



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.

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 ▾
Accounts ▾
Account Applications ▾
Account Types ▾
Auditing ▾
Branches ▾
Clients ▾
Cost Centres ▾
Credit Bureaus ▾
Departments ▾
Developer ▾
Documents ▾
Document Manager ▾
Electronic Signature ▾
Elements ▾
Entities ▾
External Parties ▾
Messaging ▾
OCR (Beta) ▾
Queues ▾
Resources ▾
Securities ▴
 General
 New Statements
 User Defined
 Item User Defined
PPSR NZ
 Scripts
 Item Scripts
Statistic Types ▾
Tasks & Workflows ▾
Users ▾
Web ▾

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 (uncheck 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/fin4.00/index.htm#XSettings.Global.SecuritiesPPSRNZ>

Click the and 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, then go to 'Securities, PPSR NZ' page.

User Preferences for Administrator (ADMIN)

PPSR NZ
Settings used by the PPSR service.

General ▾ Define the PPSR NZ service Credentials.
☐ Use details defined under Global Settings?
 Subscriber Key:

Accounts ▾
Account Applications ▾
Clients ▾
Cost Centres ▾
Developer ▾
Messaging ▾
Securities ▴
☐ General
☒ PPSR NZ
Tasks & Workflows ▾

Verify User.

User: ADMIN Administrator

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/fin4.00/index.htm#XSettings.User.Securities.PPSRNZ>

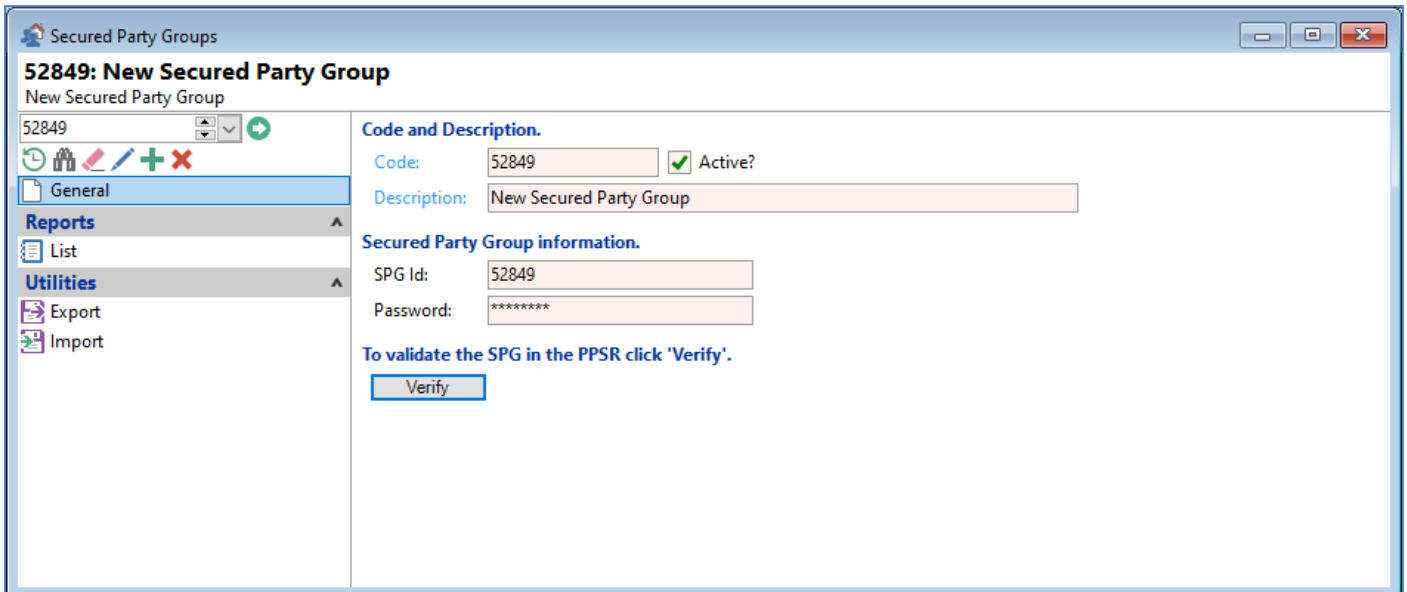
Click the button to check that the information entered is correct.

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.



52849: New Secured Party Group
New Secured Party Group

52849

Code and Description.

Code: 52849 ☒ Active?

Description: New Secured Party Group

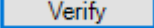
Secured Party Group information.

SPG Id: 52849

Password: *****

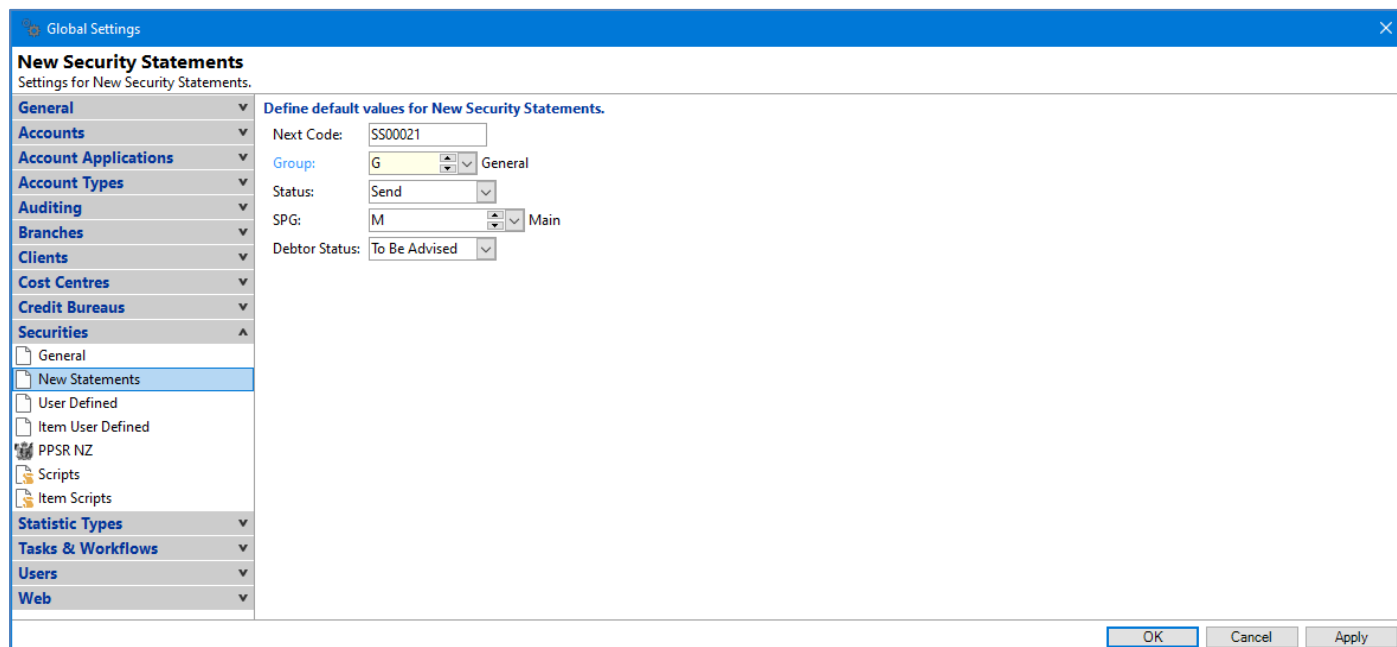
To validate the SPG in the PPSR click 'Verify'.

[Verify](#)

- c. Save the details and click on the  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.



Global Settings

New Security Statements
Settings for New Security Statements.

General ▾ Define default values for New Security Statements.

Accounts ▾ Next Code: SS00021

Account Applications ▾ Group: G General

Account Types ▾ Status: Send

Auditing ▾ SPG: M Main

Branches ▾ Debtor Status: To Be Advised

Clients ▾

Cost Centres ▾

Credit Bureaus ▾

Securities ▴

General

New Statements

User Defined

Item User Defined

PPSR NZ

Scripts

Item Scripts

Statistic Types ▾

Tasks & Workflows ▾

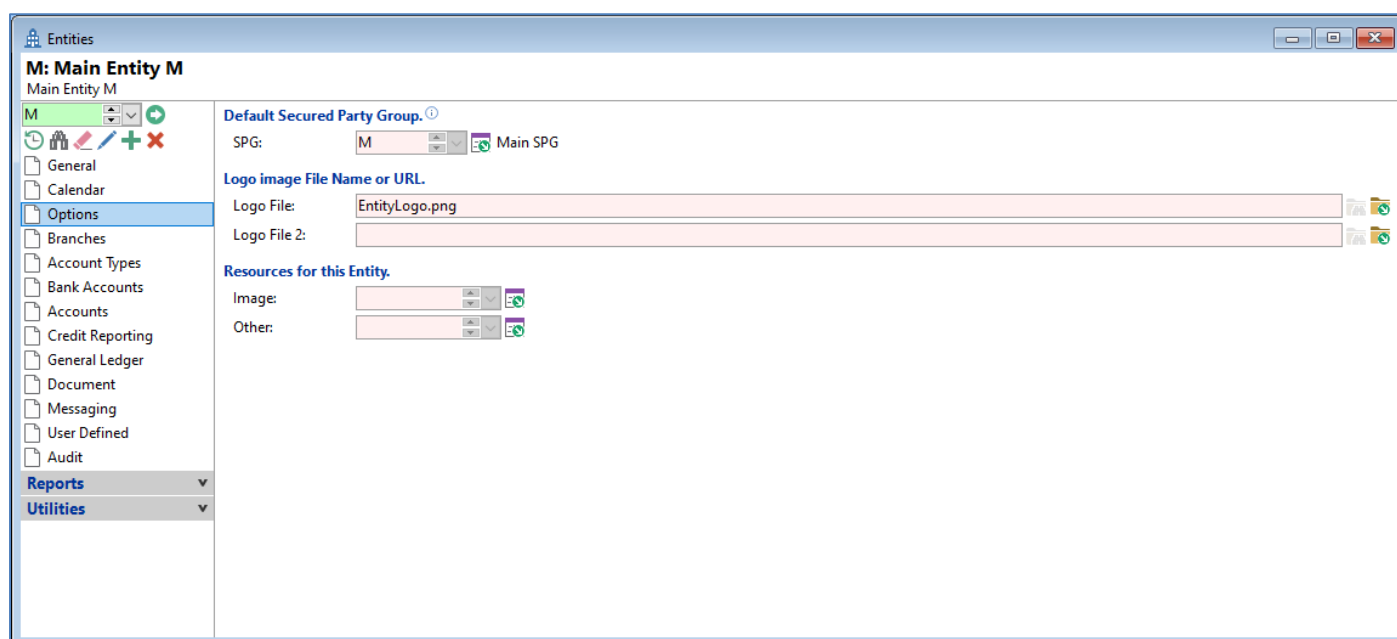
Users ▾

Web ▾

OK Cancel Apply

Menu Option – Admin, Entities

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



Entities

M: Main Entity M
Main Entity M

M

General

Calendar

Options

Branches

Account Types

Bank Accounts

Accounts

Credit Reporting

General Ledger

Document

Messaging

User Defined

Audit

Reports ▾

Utilities ▾

Default Secured Party Group. ⓘ

SPG: M Main SPG

Logo image File Name or URL.

Logo File: EntityLogo.png

Logo File 2:

Resources for this Entity.

Image:

Other:

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.

The screenshot shows a window titled 'Branches' with a sidebar on the left containing a tree view of options: General, Contact Methods, Options (selected), Employees, Messaging, User Defined, Audit, Reports (with sub-items Print, List), and Utilities (with sub-items Export, Import). The main area is titled 'M: Main Branch' and contains two sections: 'The Working Day Calendar for this Branch.' with a 'Calendar' dropdown set to 'G', and 'Default Secured Party Group.' with an 'SPG' dropdown set to 'M'.

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.

The screenshot shows a window titled 'Security Statements (Add)' with a sidebar on the left containing a tree view of options: Key Details, General, Security Items, Accounts & Clients, Logs, Files, User Defined, PPSR (selected), PPSR Transactions, Audit, Communication, PPSR, Reports, and Utilities. The main area is titled 'New Security Statement' and contains several sections: 'Financing Statement Registration Status.' with 'Status' (New), 'Action' (Register), and 'Action Status' (Send); 'Financing Statement Registration details.' with 'SPG' (M), 'Registration No.', 'Registration PIN', 'Registered' (with date and time), 'Expires' (with date and time), and 'Discharged' (with date and time); 'Financing Statement Prior Registration details.' with 'Prior Legislation' and 'Dated'; and 'Debtor Information.' with 'Status' (To Be Advised) and 'PIN'.

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/fin4.00/index.htm#XSecurityStatement>
- <http://help.intersoft.co.nz/fin4.00/index.htm#XPPSRNZ.NZUpdateWizardOverview>
- <http://help.intersoft.co.nz/fin4.00/index.htm#XPPSRNZ.TransactionReport>