INTELLECTUAL PROPERTY OFFICE

Update customer account details

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.

What you need to know

This 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

Step by step instructions

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. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - Branch Details - Create Branch.**
3. Complete the online form headed '**Branch Administration**'.
4. Fields marked with a red asterisk * must be completed.

- Branch Name
- Telephone Number: Use all three fields supplied. In the first field choose the appropriate country code (e.g. +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. You will also need to set the Invoice at Branch level flag to 'Yes'.
- Postal Address
- Street Address (optional)
- 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'**. 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.
- 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.

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 only allow 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.
- 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. We will display a message on screen to confirm that the Branch information has been updated.

Notes

The **User Administration** option is located under **My Tools** on some websites.

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

When you select a site or service at the Branch level all Users attached to your Branch will only be able to access the Sites or Services you have specified.

How to update branch details

Once a Branch has been established the Administrator (for the Customer 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. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - Branch Details - Modify Branch.**
3. Once the **'Branch Administration'** form is completed with the updated information click **Save** to continue. We will display a message on screen to confirm that the Branch information has been updated.

Notes

The **User Administration** option is located under **My Tools** on some websites.

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.

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. Log on (using your nine character User ID and your seven character password).
2. Select **User Administration - Branch Details - Modify Branch.**
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 the **'Branch Administration'** form.
5. Once the **Branch Administration** form is completed click **Save** to continue. A confirmation message displayed on screen will verify that the Branch Details have been updated successfully.

Note

The **User Administration** option is located under **My Tools** on some websites.