



MYCUSTOMS ACCOUNT USER GUIDE

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ABOUT MYCUSTOMS ACCOUNT

MyCustoms Account (MCA) is Customs' self-service digital platform for brokers and importers with deferred payment accounts. With MCA you can view your account balance, available credit and transaction history. You can also download your deferred payment account statements.

WHO TO CONTACT

If you have any questions or issues regarding MyCustoms Account, please contact revenue@customs.govt.nz

Your designated billing email address (where your monthly statements are sent) is your MyCustoms Account username. If you need to update your billing email address, please contact revenue@customs.govt.nz.

ACCESSING MYCUSTOMS ACCOUNT

Access is available from Customs website at www.customs.govt.nz/my-customs-account. Click the blue 'Go to MyCustoms Account' button under the page heading.

MyCustoms Account is best accessed from a desktop or laptop computer.

Bookmarking the URL

We recommend that you bookmark the MyCustoms Account website (www.customs.govt.nz/my-customs-account) and not the direct URL.

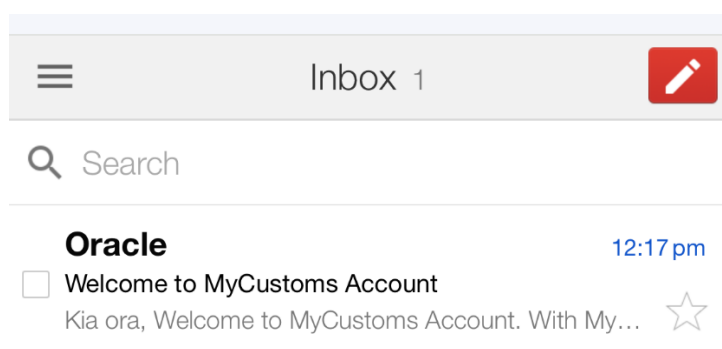
SETTING UP YOUR MYCUSTOMS ACCOUNT

Setting up your MyCustoms Account is free and simple.

Username

Your MyCustoms Account user profile is linked to the designated billing email address (where your statements are sent) for your deferred payment account.

MCA will send an email invite to your billing email address (N.B. this email will be sent from customs.govt.nz.no-reply@oraclecloud.com). Contained within the email invite is a link to activate your MCA account.



When you activate your MCA account, your billing email address becomes your MCA username.

If you need to update your designated billing email address, please contact revenue@customs.govt.nz. Updating your billing email address will prompt an email invite and link to activate your MCA account with your new billing email address as your MCA username. You will no longer be able to access MCA using your previous billing email address/username.

Note that it is only possible for one MCA user profile to be linked to a deferred payment account at any time.

Link expiry

The link in your welcome email is valid for seven (7) days. To activate your account after the link has expired, go to the MyCustoms Account webpage, click the blue button labelled 'Go to MyCustoms Account'. On the MyCustoms Account landing page, click 'Forgot Password'. You'll receive a new email with a link to set your password and activate your account.

Multiple client codes

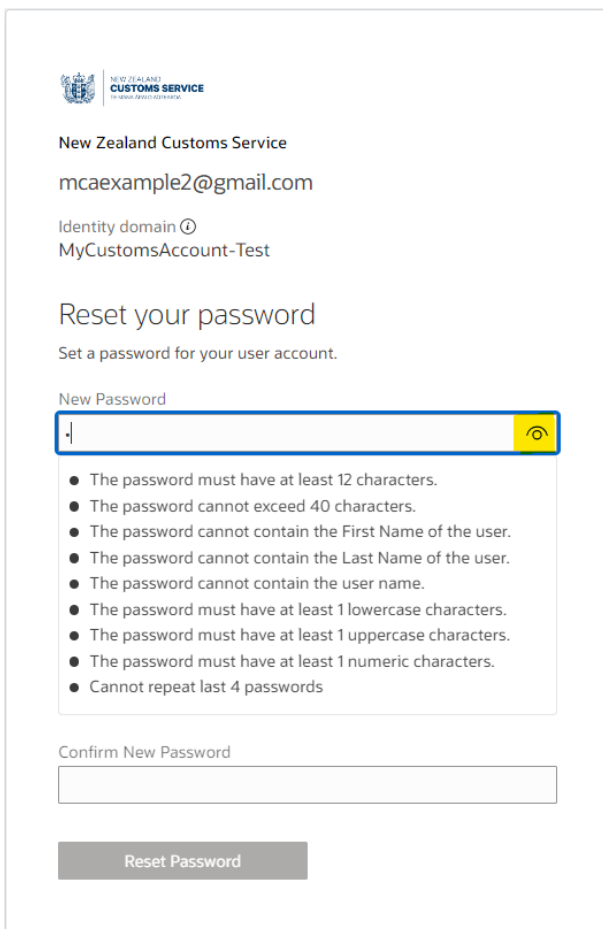
If your business has multiple deferred payment accounts with Customs and the designated billing email address is the same, you'll be able to view details for all accounts under your single MCA user profile.

Where each deferred payment account has a different billing email address, separate MCA user profiles will be created. Each user profile will only be able to view details for the deferred payment account(s) with that billing email address.

Set your password

When you follow the link in your welcome email to activate your MyCustoms Account, you'll be prompted to set a password.

1. Enter your password into the 'New Password' field. The characters will be hidden automatically. Click the eye icon on the right of the field if you want to see characters as you type.



The screenshot shows a web form for resetting a password. At the top left is the New Zealand Customs Service logo. Below it, the text reads "New Zealand Customs Service" and "mcaexample2@gmail.com". Further down, it says "Identity domain ⓘ" and "MyCustomsAccount-Test". The main heading is "Reset your password" with the subtext "Set a password for your user account." Below this is a "New Password" label above a text input field. To the right of the input field is a yellow button with an eye icon. Below the input field is a list of password requirements: at least 12 characters, cannot exceed 40 characters, cannot contain the user's first or last name or username, must have at least one lowercase, uppercase, and numeric character, and cannot repeat the last 4 passwords. Below the list is a "Confirm New Password" label above another text input field. At the bottom is a grey "Reset Password" button.

New Zealand Customs Service
mcaexample2@gmail.com
Identity domain ⓘ
MyCustomsAccount-Test

Reset your password
Set a password for your user account.

New Password

- The password must have at least 12 characters.
- The password cannot exceed 40 characters.
- The password cannot contain the First Name of the user.
- The password cannot contain the Last Name of the user.
- The password cannot contain the user name.
- The password must have at least 1 lowercase characters.
- The password must have at least 1 uppercase characters.
- The password must have at least 1 numeric characters.
- Cannot repeat last 4 passwords

Confirm New Password

Reset Password

2. Re-enter your password into the 'Confirm New Password' field.



New Zealand Customs Service
mcaexample2@gmail.com
Identity domain ⓘ
MyCustomsAccount-Test

Reset your password

Set a password for your user account.

New Password

- The password must have at least 12 characters.
- The password cannot exceed 40 characters.
- The password cannot contain the First Name of the user.
- The password cannot contain the Last Name of the user.
- The password cannot contain the user name.
- The password must have at least 1 lowercase characters.
- The password must have at least 1 uppercase characters.
- The password must have at least 1 numeric characters.
- Cannot repeat last 4 passwords

Confirm New Password

Reset Password

3. Click 'Reset Password'. A notification confirming your password has been set will appear on screen.



New Zealand Customs Service
mcaexample2@gmail.com
Identity domain ⓘ
MyCustomsAccount-Test



Congratulations!

Your password has been reset. Please login using your new password.

Continue to Sign In

4. You are now able to sign in to your MyCustoms Account. Click 'Continue to Sign In' to sign in with your username and password.

Multi-factor authentication

MyCustoms Account uses multi-factor authentication as an extra security step to protect your account. The first time you use MCA, you'll be prompted to set up multi-factor authentication. Once set up, a six-digit code will be sent to your designated billing email address that will need to be entered alongside your username and password when you sign in. Each time you sign in to MCA, a new code will be sent to your billing email address.

1. Click 'Enable secure verification'



New Zealand Customs Service

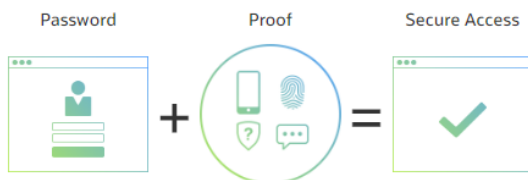
mcaexample2@gmail.com

Identity domain ⓘ

MyCustomsAccount-Test

Enable Secure Verification

Secure verification methods prove who you are. Two types of verification methods are passwordless and multi-factor authentication (MFA). Passwordless verification allows you to verify your identity without requiring you to remember a password. MFA is an extra security step to the authentication process. Your administrator might have set up one or both verification methods and require that you enroll in them before accessing your account.



Click below to enable secure verification methods for your account.

[Enable Secure Verification](#)

[What is Secure Verification?](#)

2. Click 'Email'. This will send a one-time six-digit code to your billing email address.



New Zealand Customs Service

mcaexample2@gmail.com

Identity domain ⓘ

MyCustomsAccount-Test

Select Your Default Secure Verification Method

You have already set up one or more recovery methods. We will use these same methods for Secure Verification.

Email

[What is Secure Verification?](#)

☰

Inbox 1

🔍

Search

Oracle

2:03 pm

☐

One-time passcode for MyCustoms Account

Kia ora, 301568 is your one-time passcode to acce...

☆

3. Enter the code you have received into the 'Code' field. Click 'Verify Email Address'.



New Zealand Customs Service
mcaexample2@gmail.com

Identity domain ⓘ
MyCustomsAccount-Test

Select Your Default Secure Verification Method

You have already set up one or more recovery methods. We will use these same methods for Secure Verification.

 Email

An email that contains a verification code has been sent to mcaexample2@gmail.com.

Code

285720

[Resend code](#)

Verify Email Address

[What is Secure Verification?](#)

4. A notification confirming your multi-factor authentication has been set will appear on screen.



New Zealand Customs Service
mcaexample2@gmail.com

Identity domain ⓘ
MyCustomsAccount-Test



Successfully Enrolled

Your email address, **mcaexample2@gmail.com**, has been set as your default.

Done

My Apps page

After setting your multi-factor authentication, you'll be presented with a My Apps landing page.

1. Select the MyCustoms Account tile.



SIGN IN

You'll need to sign in to MyCustoms Account each time you use it.

1. Enter your username and password. Remember, your username is the designated billing email address for your deferred payment account (where your monthly statements are sent).
2. Click 'Sign In'.



New Zealand Customs Service

MyCustoms Account Sign In

Identity domain ⓘ

MyCustomsAccount-Test

User Name

mcaexample2@gmail.com

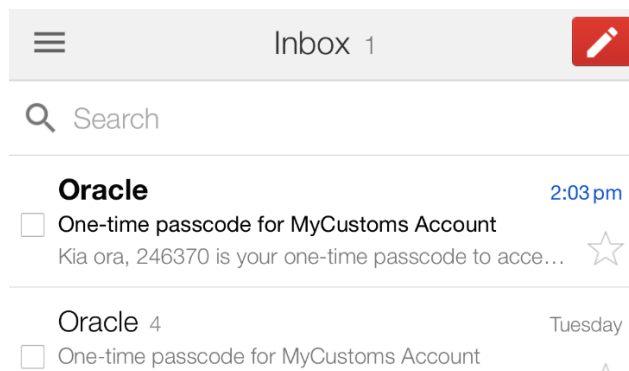
Password

[Forgot Password?](#)

Sign In

[Need help signing in?](#)

3. A one-time code will be sent to your email address.



4. If you do not receive an email with your passcode, click 'Resend Passcode'.



New Zealand Customs Service

mcaexample2@gmail.com

Identity domain ⓘ

MyCustomsAccount-Test



Email Verification

An email containing a passcode has been sent to
mcaXXXXX@gmail.com.

Passcode

Resend Passcode

Verify

[Show alternative login methods](#)

5. Enter the passcode and click 'Verify'. You will be directed to the account summary page of MyCustoms Account.



New Zealand Customs Service

mcaexample2@gmail.com

Identity domain ⓘ

MyCustomsAccount-Test



Email Verification

An email containing a passcode has been sent to
mcaXXXXX@gmail.com.

Passcode

[Resend Passcode](#)

Verify

[Show alternative login methods](#)

Resetting your password

You can reset your password if you forget it or otherwise want to change it. You should always reset your password if you have concerns that your existing password has been compromised.

1. Click 'Forgot password?'



New Zealand Customs Service

MyCustoms Account Sign In

Identity domain ⓘ

MyCustomsAccount-Test

User Name

User name or email

Password

Password

[Forgot Password?](#)

Sign In

[Need help signing in?](#)

2. Enter your username. Remember, your username is the designated billing email address for your deferred payment account (where your monthly statements are sent).



New Zealand Customs Service

Identity domain ⓘ

MyCustomsAccount-Test

Forgot Your Password?

Having trouble with your password? Reset it here.

What's your user name?

mcaexample2@gmail.com

Next

[Cancel](#)

3. Click 'Next'.
4. A screen will show to confirm that a password reset notification has been emailed.



New Zealand Customs Service

mcaexample2@gmail.com

Identity domain ⓘ

MyCustomsAccount-Test



Password Reset Notification Sent.

A password reset notification will be sent to the recovery email address associated with your username **mcaexample2@gmail.com**. If you haven't received the password reset email, then please check your spam folder or contact your system administrator. You can also retry after 10 minutes.

[Return to sign in](#)

5. Click 'Return to sign in'.
6. In the email received, click on the 'Password Reset' button.



NEW ZEALAND
CUSTOMS SERVICE
TE MANA ĀRAI O AOTEAROA

Kia ora,

A password reset request has been received for your MyCustoms Account. On Monday, July 1, 2024, at 1:55:38 PM NZST, you requested to reset your password.

[Password Reset](#)

7. Type your new password into the 'New Password' field. The characters will be hidden automatically. Click the eye icon on the right of the field if you want to see characters as you type.



New Zealand Customs Service
mcaexample2@gmail.com

Identity domain ⓘ
MyCustomsAccount-Test

Reset your password

Set a password for your user account.

New Password

- The password must have at least 12 characters.
- The password cannot exceed 40 characters.
- The password cannot contain the First Name of the user.
- The password cannot contain the Last Name of the user.
- The password cannot contain the user name.
- The password must have at least 1 lowercase characters.
- The password must have at least 1 uppercase characters.
- The password must have at least 1 numeric characters.
- Cannot repeat last 4 passwords

Confirm New Password

Reset Password

8. Re-enter your password into the 'Confirm New Password' field.



New Zealand Customs Service
mcaexample2@gmail.com

Identity domain ⓘ
MyCustomsAccount-Test

Reset your password

Set a password for your user account.

New Password

- The password must have at least 12 characters.
- The password cannot exceed 40 characters.
- The password cannot contain the First Name of the user.
- The password cannot contain the Last Name of the user.
- The password cannot contain the user name.
- The password must have at least 1 lowercase characters.
- The password must have at least 1 uppercase characters.
- The password must have at least 1 numeric characters.
- Cannot repeat last 4 passwords

Confirm New Password

Reset Password

9. You are now able to sign in to your MyCustoms Account. Click 'Continue to Sign In' to sign in with your username and password.



New Zealand Customs Service

mcaexample2@gmail.com

Identity domain ⓘ

MyCustomsAccount-Test



Congratulations!

Your password has been reset. Please login using your new password.

Continue to Sign In

Need help?

If you need help to sign in to MyCustoms Account, please contact revenue@customs.govt.nz.

We do not recommend using the 'Need help signing in?' link.

OVERVIEW OF MYCUSTOMS ACCOUNT

MyCustoms Account has three screens: Account Summary, Transaction History, and Statement Download.

Account Summary is a quick way to check your account balance and available credit.

AHUMONI

MyCustoms Account

Account Summary

Transaction History

Statement Download

Account Number *

Required

Search

Account Number	Business Unit	Credit Limit	Current Balance	Available Credit	Last Updated
No data to display.					

Transaction History provides a view of all transactions on your deferred payment account, including open transactions that have not yet been statemented. Transactions available to view date from October 2020 onward.

AHUMONI

MyCustoms Account

Transaction History

Account Summary

Statement Download

Account Number *

Required

From Date *

To Date *

Transaction Type

Reference Number

Client Reference

Search

Export

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
No data to display.												

Statement Download allows for issued monthly statements to be downloaded to your device. Statements available for download date from December 2023 onward.

AHUMONI

MyCustoms Account

Statement Download

Account Summary

Transaction History

Account Number *

Required

From Date *

To Date *

Search

Download

Document Date	Document Title
No data to display.	

Navigating MyCustoms Account

To navigate through MCA, use the buttons located on the right-hand side of the page to select the desired screen.

AHUMONI
EB

MyCustoms Account

Statement Download

Account Number *

Required

From Date *
05/03/2024

To Date *
05/04/2024

Account Summary
Transaction History

Search
Download

Document Date
Document Title

No data to display.

To refresh MCA, click the search button. If you have not completed compulsory search fields (marked with an asterisk) you will need to do this before clicking the search button.

AHUMONI
EB

MyCustoms Account

Statement Download

Account Number *

Required

From Date *
05/03/2024

To Date *
05/04/2024

Account Summary
Transaction History

Search
Download

Document Date
Document Title

No data to display.

MyCustoms Account does not support web browser navigation buttons, for example go back (Alt + Left arrow) and refresh (Ctrl + R).

ACCOUNT SUMMARY

- 1. Select your account number (client code) from the 'Account Number' dropdown. If you have multiple accounts, you can select 'All' to see a summary of all your accounts.

Account Summary
Account Number *

All

40718340B

40720912F

40721377H

- 2. Click 'Search'.

Account Summary

Transaction HistoryStatement Download

Account Number *

40721377H

Search

Account Number	Business Unit	Credit Limit	Current Balance	Available Credit	Last Updated
No data to display					

- 3. The table will populate with a summary of your account information: Credit limit, current balance, available credit, and last updated date and time.

Account Summary

Transaction History

Account Number *

40721377H

Account Number	Business Unit	Credit Limit	Current Balance	Available Credit	Last Updated
40721377H	CBROK	1,000,000.00	10,961.08	989,038.92	04/04/2024 23:00:11

MyCustoms Account updates periodically. New transactions may take up to 30 minutes to appear and for the account summary to update. If your account summary has not updated after 30 minutes, please follow the instructions to [refresh the page](#).

TRANSACTION HISTORY

Transactions applied to your account(s) can be search using different search parameters. MyCustoms Account has transactions dating to December 2019 available to search.

Note that there is a limit of 500 transactions displayed on screen and 25,000 transactions displayed in the exported .csv file.

Compulsory search fields

Account Number, From Date, and To Date are compulsory search fields and must be completed for transactions to show.

1. Select your account number (client code) from the dropdown.

The screenshot shows the 'Transaction History' search interface. The 'Account Number' field is a dropdown menu with the value '40721377H' selected. The 'From Date' field is pre-filled with '18/03/2024'. Below the search fields, there is a table header with columns 'Type' and 'Transaction Date'. The table currently displays 'No data to display.'

2. Click the calendar icon on From Date and To Date to select the date range that you want to search. Note, these fields are pre-filled to show transactions from the last 30 days.

The screenshot shows the 'Transaction History' search interface with a calendar overlay for the 'From Date' field. The 'Account Number' field is a dropdown menu. The 'From Date' field is pre-filled with '18/03/2024' and has a calendar icon. The 'To Date' field is pre-filled with '18/04/2024' and also has a calendar icon. The 'Transaction Type' field is a dropdown menu. Below the search fields, there is a table header with columns 'Reference Number', 'Type', 'Transaction Date', 'Third Party', 'Bill To', and 'Fees and Levies'. The table currently displays 'No data to display.'

3. Click 'Search'

Transaction History

Account Number * 40721377H From Date * 01/02/2024 To Date * 18/04/2024 Transaction Type Reference Number Client Reference

Search Export

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
No data to display.												

4. On screen you will see all transactions applied to your account over the chosen period.

Transaction History

Account Number * 40721377H From Date * 01/02/2024 To Date * 18/04/2024 Transaction Type Reference Number Client Reference

Search Export

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
8716982101	INVOICE	03/04/2024	20/05/2024	MCA2	ENGINEERING AND AUTO LIMITED	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	620.70	0.00	712.59	712.59
5700738201	INVOICE	03/04/2024	20/05/2024	ENTRY3	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	13,656.60	0.00	13,748.49	10,748.49
6979382202	INVOICE	03/04/2024	20/05/2024	ENTRY5	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	6,347.55	0.00	6,439.44	0.00
6979382203	INVOICE	03/04/2024	20/05/2024	ENTRY5	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	0.00	0.00	4,500.00	0.00	4,500.00	4,500.00
5700738202	CREDIT MEMO	03/04/2024	03/04/2024	ENTRY3	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	0.00	0.00	-3,000.00	0.00	-3,000.00	0.00
6979382202	PAYMENT	03/04/2024		CBROK			0.00	0.00	0.00	0.00	-6,439.44	0.00
TOP UP	PAYMENT	03/04/2024		CBROK			0.00	0.00	0.00	0.00	-5,000.00	-5,000.00

Optional search fields

Use the optional search fields to refine your results. Transactions can be searched by Transaction Type, Reference Number, and Client Reference.

Transaction type

1. Add compulsory search criteria, following the instructions [above](#).
2. Select your transaction type from the dropdown menu. Transactions may be refined by credit memo, invoice and payment types.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type

Reference Number Type Transaction Date Due Date Client Reference Third Party

No data to display.

Credit Memo
Invoice
Payment

3. Click 'Search'.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Invoice Reference Number Client Reference

Search Export

Reference Number Type Transaction Date Due Date Client Reference Third Party Bill To Fees and Levies GST on Fees and Levies GST on Imports Duty Transaction Total Balance Amount

No data to display.

4. On screen you will see all transactions of the specified type that are applied to your account for the chosen period.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Invoice Reference Number Client Reference

Search Export

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
8716982101	INVOICE	03/04/2024	20/05/2024	MCA2	ENGINEERING AND AUTO LIMITED	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	620.70	0.00	712.59	712.59
5700738201	INVOICE	03/04/2024	20/05/2024	ENTRY3	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	13,656.60	0.00	13,748.49	10,748.49
6979382202	INVOICE	03/04/2024	20/05/2024	ENTRY5	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	6,347.55	0.00	6,439.44	0.00
6979382203	INVOICE	03/04/2024	20/05/2024	ENTRY5	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	0.00	0.00	4,500.00	0.00	4,500.00	4,500.00

5. To clear the transaction type from your search, select the blank option from the Transaction Type dropdown menu. Click 'Search'.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number Client Reference

Search Export

Credit Memo

Invoice

Payment

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
8716982101	INVOICE	03/04/2024	20/05/2024	MCA2	ENGINEERING AND AUTO LIMITED							
5700738201	INVOICE	03/04/2024	20/05/2024	ENTRY3	CREATEPERSONIMPORTER, AUTO HC	ISATIONBROKERAGE	79.90	11.99	620.70	0.00	712.59	712.59
6979382202	INVOICE	03/04/2024	20/05/2024	ENTRY5	CREATEPERSONIMPORTER, AUTO HC	ISATIONBROKERAGE	79.90	11.99	13,656.60	0.00	13,748.49	10,748.49
6979382203	INVOICE	03/04/2024	20/05/2024	ENTRY5	CREATEPERSONIMPORTER, AUTO HC	ISATIONBROKERAGE	79.90	11.99	6,347.55	0.00	6,439.44	0.00
						AUTO OD CREATEORGANISATIONBROKERAGE	0.00	0.00	4,500.00	0.00	4,500.00	4,500.00

Reference number

- Add compulsory search criteria, following the instructions [above](#).
- Type the reference number into Reference Number field.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number 5700738201 Client Reference

Search Export

Reference Number Type Transaction Date Due Date Client Reference Third Party Bill To Fees and Levies GST on Fees and Levies GST on Imports Duty Transaction Total Balance Amount

No data to display.

3. Click 'Search'

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number 5700738201 Client Reference

Search Export

Reference Number Type Transaction Date Due Date Client Reference Third Party Bill To Fees and Levies GST on Fees and Levies GST on Imports Duty Transaction Total Balance Amount

No data to display.

4. On screen you will see only the transaction with the specified reference number.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number 5700738201 Client Reference

Search Export

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
5700738201	INVOICE	03/04/2024	20/05/2024	ENTRY3	CREATEPERSONIMPORTER, AUTO HC	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	13.656.60	0.00	13.748.49	10.748.49

Client Reference

1. Add compulsory search criteria, following the instructions [above](#).
2. Type the client reference into the Client Reference field.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number Client Reference MCA2

Search Export

No data to display.

3. Click 'Search'.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number Client Reference MCA2

Search Export

No data to display.

4. On screen you will see all transactions relating to the specified client reference for the period selected.

Transaction History

Account Number * 40721377H From Date * 18/03/2024 To Date * 18/04/2024 Transaction Type Reference Number Client Reference MCA2

Search Export

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
8716982101	INVOICE	03/04/2024	20/05/2024	MCA2	ENGINEERING AND AUTO LIMITED	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	620.70	0.00	712.59	712.59

Partial and wildcard search

It is possible to search for transactions even when you don't have the exact search details. Partial and wildcard searches are available on the reference number and client reference fields.

1. Add compulsory search criteria, following the instructions [above](#).
2. In the reference number or client reference field, type your search criteria. If the information you are missing is at the start or partway through, use an asterisk (*) in its place.

Transaction History

Account Number * 40721377H From Date * 01/04/2024 To Date * 01/07/2024 Transaction Type Reference Number 5700 Client Reference

Search Export

Transaction History

Account Number *
40721377H

From Date *
01/04/2024

To Date *
01/07/2024

Transaction Type
▼

Reference Number
57*20

Client Reference

Account SummaryStatement Download

SearchExport

Transaction History

Account Number *
40721377H

From Date *
01/04/2024

To Date *
01/07/2024

Transaction Type
▼

Reference Number
*820

Client Reference

Account SummaryStatement Download

SearchExport

3. Click 'Search'

Transaction History

Account Number *
40721377H

From Date *
01/04/2024

To Date *
01/07/2024

Transaction Type
▼

Reference Number
*820

Client Reference

Account SummaryStatement Download

SearchExport

4. On screen you will see all transactions that contain the specified client reference snippet.

Transaction History

Account Number *
40721377H

From Date *
01/04/2024

To Date *
01/07/2024

Transaction Type
▼

Reference Number
57*20

Client Reference

Account SummaryStatement Download

SearchExport

Reference Number	Type	Transaction Date	Due Date	Client Reference	Third Party	Bill To	Fees and Levies	GST on Fees and Levies	GST on Imports	Duty	Transaction Total	Balance Amount
5700738201	INVOICE	03/04/2024	20/05/2024	ENTRY3	IMPORTER, EXAMPLE	AUTO OD CREATEORGANISATIONBROKERAGE	79.90	11.99	13.656.60	0.00	13,748.49	10,748.49
5700738202	CREDIT MEMO	03/04/2024	03/04/2024	ENTRY3	IMPORTER, EXAMPLE	AUTO OD CREATEORGANISATIONBROKERAGE	0.00	0.00	-3,000.00	0.00	-3,000.00	0.00

DOWNLOAD STATEMENTS

1. Select your account number (client code) from the dropdown.

Statement Download

Account Number *

40721377H

☐ Document Date

No data to display.

2. Click the calendar icon on From Date and To Date to select the date range that you want to search. Note, these fields are pre-filled to show transactions from the last 30 days.

Statement Download

Account Number *

40721377H

☐ Document Date

No data to display.

From Date *

18/03/2024

To Date *

18/04/2024

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March 2023

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3. Click 'Search'.

Statement Download

Account Number *

40721377H

From Date *

16/04/2024

To Date *

16/05/2024

☐ Document Date

Account Summary

Transaction History

Search

Download

☐

Document Title

☐

17/04/24 11:35 PM

30-04-2024 - PDF - 40721377H - CBROK - Broker Deferred Payment Statement

☐

17/04/24 11:35 PM

30-04-2024 - CSV - 40721377H - CBROK - Broker Deferred Payment Statement

4. Click the box to the left of a statement to select it. Click 'Download'.

Statement Download

Account Number *

40721377H

From Date *

16/04/2024

To Date *

16/05/2024

Account Summary

Transaction History

Search

Download

☐ Document Date Document Title

☒ 17/04/24 11:35 PM 30-04-2024 - PDF - 40721377H - CBROK - Broker Deferred Payment Statement

☐ 17/04/24 11:35 PM 30-04-2024 - CSV - 40721377H - CBROK - Broker Deferred Payment Statement

5. You can choose to select all statements by click the top box.

Statement Download

Account Number *

40721377H

From Date *

16/04/2024

To Date *

16/05/2024

Account Summary

Transaction History

Search

Download

☒ Document Date Document Title

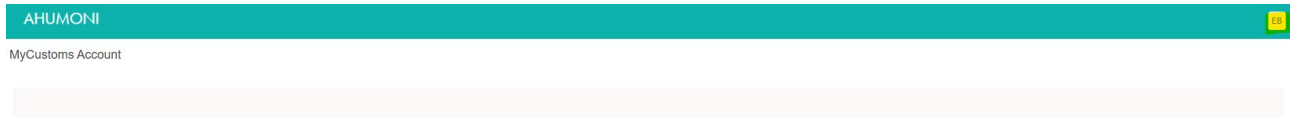
☒ 17/04/24 11:35 PM 30-04-2024 - PDF - 40721377H - CBROK - Broker Deferred Payment Statement

☒ 17/04/24 11:35 PM 30-04-2024 - CSV - 40721377H - CBROK - Broker Deferred Payment Statement

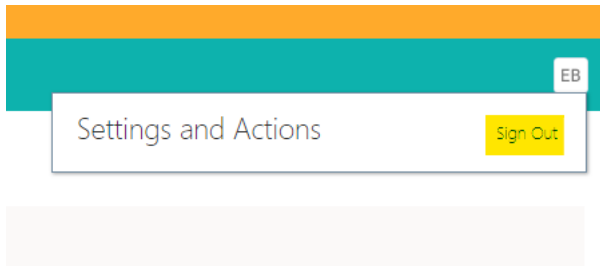
6. Files will be downloaded to a zip file.

SIGN OUT

1. Click the icon in the top right corner of the screen that takes you to Settings and Actions.



2. Click 'sign out'.



3. Click 'Confirm'.

