



Add or update a client record

Approved persons (ARC, ARE, ARX) user guide

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Introduction

This document details the process for [approved radio certifiers, engineers and examiners \(ARCs, AREs, ARXs\)](#) to date an existing client record in the [Register of Radio of Frequencies \(the RRF\)](#) for the purposes of recording a new, and updating an existing management right, licence or certificate record.

Explanation

Document Steps, Images and Links

This document contains instructions (steps) to perform a process within the RRF.

- Some steps are followed by an image that demonstrates the onscreen result of that step.
- Some steps include links to other steps or sections within the document or to other user guides; these are designated using 'go to' or 'refer to'.
- Clicking the section name or step number moves you directly to that section or user guide.

Requirements


- You must be an approved radio engineer, certifier or examiner to perform this process.
- Clients must have legal entity status before a Management Right, Licence or Certificate can be granted as outlined in the Radio Spectrum Management (RSM) publication [Legal entities for the purposes of the Radiocommunications Act 1989 \(PIB 47\)](#).

Authority

An approved person must have permission from the client to either update or add a client record in the RRF. We recommend that a copy of the authority be uploaded to the client event summary in the RRF.

Technical Assistance

Comprehensive help is available to help ARCs, AREs and ARXs complete the various processes:

- Technical assistance can be found within the Public Information Brochures (PIBs); these are located within the [Resources for AREs and ARCs](#) and [Resources for ARX](#) on the RSM website. The PIBs provide licensing, technical rules and other general information on a range of common radio services such as CB Radio, Amateur Radio and Maritime VHF Radio.
- Various [user guides](#) on the RSM website describe the steps to take to complete each process.
- Some fields and sections in the Register of Radio Frequencies (the RRF) have help text.
 - Click or hover over the  (Information icon) to view the help text with information about what to enter in the field or information about a section of the screen.
- Please contact RSM if you require further assistance:
 - Email rsmlicensing@mbie.govt.nz
 - Phone the freephone number 0508 RSM INFO (0508 776463).

Approved Radio Certifiers and Engineers

You should be familiar with the following PIBs:

- Table of Radio Spectrum Usage in New Zealand (PIB 21)
- Fixed service Bands in New Zealand (PIB 22)
- Mobile service Bands in New Zealand (PIB 23)
- Radio Licence Certification Rules (PIB 38)
- Spectrum Licence Certification Rules for Crown Management Rights (PIB 39)
- Audit Procedures for Engineering Certificates issued by Approved Persons (PIB 40)
- Radio Licence Policy Rules (PIB 58)
- Policy rules for Crown Spectrum Management Rights (PIB 59).

Approved Radio Examiners

You should be familiar with the following PIBs:

- Radio Operator Certificate and Callsign Rules (PIB 46).

Amendment history

Version	Date	Details
0.01 0.02	July 2022 December 2022	Draft RRF for review
0.03	December 2022	Draft for Release 1
0.04	February 2023	Draft for Release 2
1.00	March 2023	Final version

Overview

Adding and Updating

- Fields marked with an *asterisk are mandatory.
- If the client is an organisation, the organisation name must be a legal entity. See [Legal Entities for the purposes of the Radiocommunications Act 1989 \(PIB 47\)](#).
- The billing name may differ from the client’s name. For example, it may be a trading name.
- The Register does not accept PO Box numbers for registered/legal or residential/physical addresses, unless the information is historical Companies Office data.
- The name and date of the last person to update the details are recorded on some of the client address screens.

Annual Fees

Default Billing Month

- When adding a new client in the Register, the ‘default billing month’ automatically defaults to the month prior to the month in which you are creating the client. This determines the client’s annual billing period. For example:
 - if you are creating a client in January, the automatic default is December, and the billing period is taken from the certification date in January to 31 December 20XX = 12 months. If the certification is not created in January, the annual fee is pro-rated.

Default billing month * June	Email(s) * activate@rsm.govt.nz
<input checked="" type="checkbox"/> Include invoice with renewal email(s)?	
Renewal email(s) * myagent@mycompany.co.nz	Renewal invoice reference

- Future annual fees are for the full 12-month period. That is, from 01 January 20XX to 31 December 20XX unless the licence is fixed term and expires on a date prior to the end of the billing period.

Include Invoice with Renewal Email

- Clients can choose to have an annual renewal invoice emailed to them at the same time as they receive their annual licence fee renewal email.
- Select the **Include Invoice with Renewal Email(s)** check box and add an email address when creating or updating a client. (See screen above.)
- If the client has a direct debit set up, do not select the **Include Invoice with Renewal Email(s)** check box. Otherwise, when exiting a warning message displays and you must click ‘Don’t Save’ the changes.

Warning

NOTE - if you elect to receive an invoice with your renewal email, the licences due for renewal will not be included in your Direct Debit invoice at the end of the month.

Emails

What emails go where?

Maintain Client Screen

- If a client has an email address only on the *Maintain Client* screen, all emails are sent this address unless there is an **Invoice with Renewal** email. If an approved person enters their own email address here, they are responsible for these emails on behalf of the client.

Email Types

- Changes to the status of a licence. For example, new licences, modification, cancellation, transfer, granting, certificate expiry and licence expiry, etc.
- Any changes made to client details on the *Maintain Client* screen.
- Annual licence renewals if the 'Invoice with Renewal' check box is not selected.

Phone Numbers

- The Register does not record the zero (0) in the area code. For example:
 - Area codes display as '3', '4', '6', '7' or '9'
 - Free phone numbers display as '800' or '508'
 - Cell phone numbers display as '21', '22', '27', '29'.

Phone number(s)

Phone type *	Country *	Code	Area *	Number *	
Private	New Zealand	64	4	4444444	
Business	New Zealand	64		1234321	<input type="button" value="Remove"/>

Addresses and Contacts

- **Licence Contact:** Only the licence contact receives auto-generated emails relating to the licence status. For example, new licences, modification, cancellation, transfer, granting, certificate expiry and licence expiry.
- To update or change an address you need to **Edit** the Client record.
- Contacts can be updated without having to edit the client record.

Legal Entities

RSM requires that all clients who hold a licence, callsign or management right must have legal entity status. RSM does not grant a licence, callsign or management right if legal entity status has not been established. You can research legal entities in [Legal entities for the purposes of the Radiocommunications Act 1989 \(PIB 47\)](#).

Companies Office Register Search

- When you enter a company name (or NZBN) in the NZBN field of the *Create Client* screen you are accessing the Companies Office information.
- If required, you can interpedently search the [Companies Office Register](#) to determine the legal entity status of a company, incorporated society, charitable trust etc.

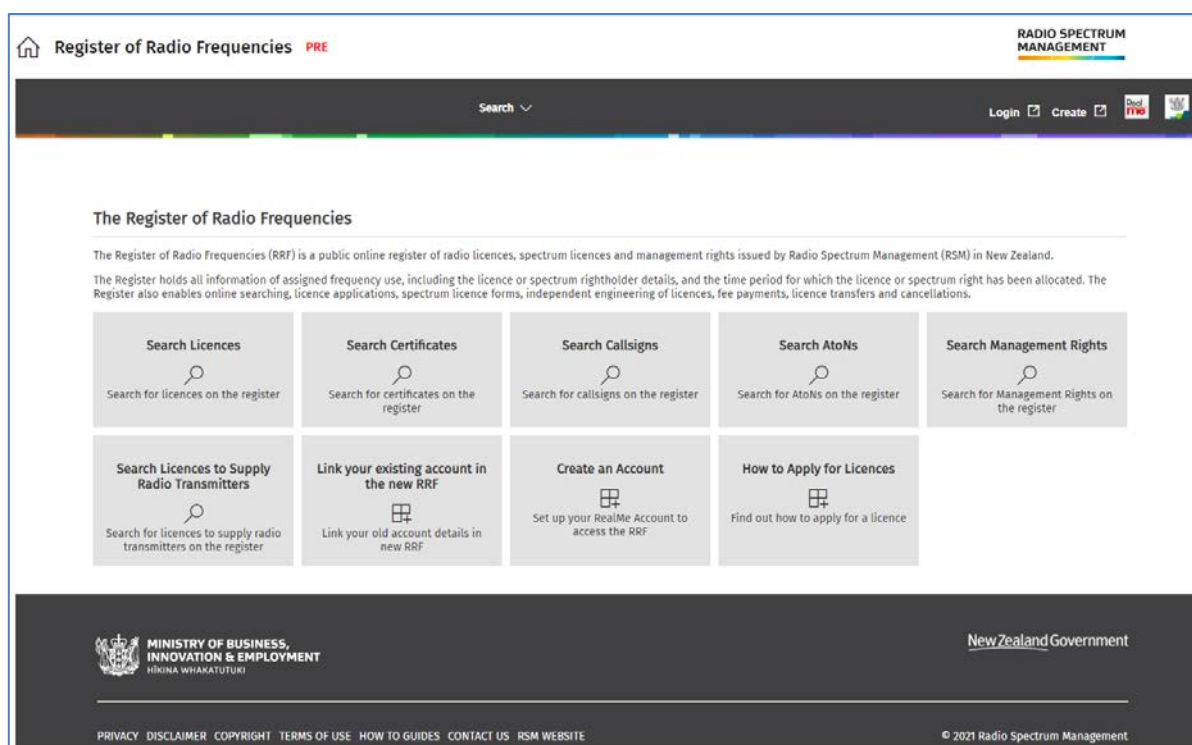
Add or Update Client Record Details

Check if the client is already recorded

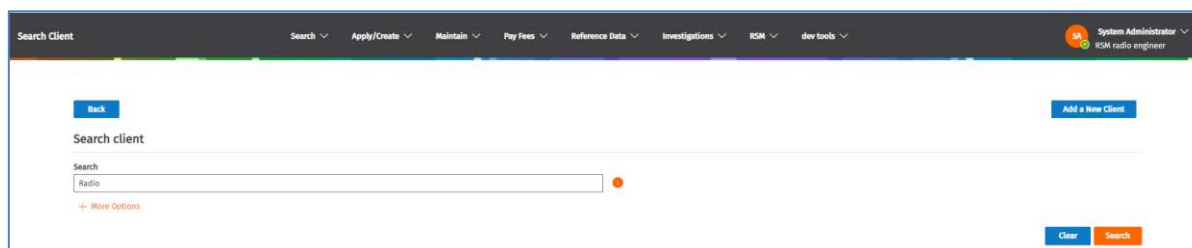
Before adding or updating a client record details you must perform a search for the client in the RRF to check if the client record already exists and you have the correct record:

- If the client does not exist in the Register, you can add a new client in accordance with [Legal entities for the purposes of the Radiocommunications Act 1989 \(PIB 47\)](#).
- If the client exists in the RRF, check their details are correct and update if required.

1. Select [Register of Radio Frequencies \(RRF\)](#) on the RSM Website to display the RRF Welcome screen.



2. Log in to the RRF using RealMe.
3. Select **Search > Clients** from the menu on the RRF Home Page to display the *Search Client* screen.



- You can search by client number, organisation, person client name, NZBN or billing name.
- Entering less information in the search criteria returns more results.
- There may be more than one client number for the same client, (i.e. organisation or person) or billing name.

Note: Searching by client number is the recommended searching method.

4. Enter your search criteria and click **Search**.

- If you need to refine your search further, click **More Options** and search on your client's address(es), client type or status, etc.

Search Client

Back Add a New Client

Search client

Search
Radio

Less Options

Residential/Physical address
Start typing to search for an address

Email address

Client type Client status Client visibility
Active Visible

Clear Search

5. Do one of the following:

- If you locate the client record in the search results, click **View** to display the record.
 - If you need to update details in the **Basic Details** section of the record, go to [Update client details, address and phone](#).
 - If you need to update other details in the record, go to [Update Contacts, Organisation users and Delegations](#).
- If you cannot locate the client, click **Add a New Client** and go to [Add a New Client](#).

Search results

Applied filters: Client status: Active, Client visibility: Visible

411 results found | Showing 20 per page

Client numb	Status	Hidden	Type	Client name ↑	Billing name	Residential/Physical address	View
134044	Active		Registered Company	1321 AM BAY RADIO LIMITED	1321 AM BAY RADIO LIMITED	PO BOX 134, TAURANGA, NZ	View
115835	Active		Registered Company	1321AM BAY RADIO LTD	1321AM BAY RADIO LTD	STATE INSURANCE BUILDING, SPRING STREET, TAURANGA, NZ	View
131705	Active		Amateur Radio Club	A.N.A.R.S.	THE AUSTRALIAN NAVAL AMATEUR RADIO SOCIETY	HOLDER: MR A F LOCK, 27 REGENT DRIVE, PARAPARAUMU, NZ	View

Note: There may be more than one client number for the same client. This could be on purpose. It is important to check you have the correct client number before continuing.

Update client details, address and phone

Complete the steps in the [Check if the client is already recorded](#) and click **View** to display the *Maintain Client* screen.

1. Click **Edit**.
2. Scroll down the *Maintain Client* screen to locate the details to update.
3. To update information in the **Basic Details** section, for example:
 - Update the email address.
 - Change whether to include an invoice with renewal emails.
 - If ticked, add the **Renewal Email(s)** address. If you enter multiple emails, separate each email address with a comma (,).
 - Note:** Do not select this option if the client is registered to pay by direct debit.
 - Update phone number(s):
 - Edit any existing number (if incorrect).
 - Click **Remove** next to a phone number record to remove.
 - Click **Add** and enter details of a new phone number.
4. To update information in the **Addresses** section. For example:
 - Update details in **Residential/Physical Address** and/or **Billing/Postal address**.

Note: If the client is a Registered Company, Charitable Trust, Incorporated Society or Limited Partnership, the **Registered/Legal Address** must be the same as the address registered at the Companies Office.
5. Click **Save** if you have updated any details. A message displays advising if the update was successful or not.
6. To update details of **Contacts, Organisation users** or **Delegations**, refer to, [Update Contacts, Organisation users and Delegations](#).

Update Contacts, Organisation users and Delegations

The **Contacts**, **Organisation users** and **Delegations** on a client record are located below the **Addresses** section of the *Maintain Client* screen. These sections can be updated independently, without having to edit the whole client record.

Addresses

Residential/Physical Address 42 Main Street, Wellington, 6011, NZ

Billing/Postal Address PO Box 2847, Wellington, 6040, NZ

Registered/Legal Address Level 4, 15 Stout Street, Pipitea, Wellington, 6011, NZ

Contacts + Add

Organisation users + Add

Delegations + Add

For internal use only

File note and attachment + Add

Event log

Back Create audit Edit

An authorised user for your organisation with administrator access can set up someone else to manage your organisation's client record and licence, (e.g. an approved radio engineer (ARE) or certifier (ARC), or an employee).

If you don't have administrator access, find someone in your organisation with authority to act on behalf of the organisation who can give RSM written approval to set up another user. This could be your director or manager.

Organisation and delegated users will receive a confirmation email with instructions. They'll also need a RealMe login account set up to access the RRF.

Add or Update Contacts

1. Scroll down to the **Contacts** in the *Maintain Client* screen.
2. Click **Contacts** to expand this section and review details of any existing contacts recorded for the client.

Contacts + Add

Contact type	Name	Phone number(s)	Responsibility	Actions
Licence	Joseph Bloggs	NZ 4 1234567, NZ 9 1357900	Manager	View Remove
Licence	Hardly Normal	NZ 4 5556789	Techy guy	View Remove
Payment	Joanne Bloggs	NZ 4 9783100	Accounts Payable	View Remove

3. To add a new contact:
 - Click **Add**. New fields display to enter name and phone details for the contact.

- Select the **Contact type**, then enter their name and other relevant details and their phone number.
 - If you need to add a second phone number for this contact, click **Add a phone number** and complete the phone number details.
 - Click **Save**. You return to the contacts list and the new contact displays.
- To update details of an existing contact:
 - Click **View** to display their details.
 - Click **Edit** and make the required updates to their details or phone number and/or add or remove a phone number.
 - Click **Save**. You return to the **Contacts** list and the updated details display.
 - To remove a contact, click **Remove**. A confirmation message displays, click **OK**. You return to the **Contacts** list and the user no longer displays.

Add or Update Organisation users

You can set up someone else in your organisation to manage your organisation's client record and licence. They will receive a confirmation email with a link to your record and instructions and accept (or reject) the invitation. They must have a RealMe account to access the RRF.

1. Scroll down to the **Organisation users** in the *Maintain Client* screen.
2. Click **Organisation users** to expand this section and review details of any organisation users recorded for the client.

User ID	First name	Last name ↑	Email	Rightholder	Manager	User admin	Status	Actions
4056	Joe	Bloggs	chris.zawodny@mbie.govt.nz			Yes	Current	View Remove
2193	SMART	Business	smart.client@mbie.govt.nz	Yes		Yes	Current	View Remove
1452	Smart	Business (Manager)	smart.info@mbie.govt.nz		Yes		Current	View Remove
2296	John	Citizen	smart.client@mbie.govt.nz				Current	View Remove
2927	Clever	Cloggs	chris.zawodny@med.govt.nz	Yes		Yes	Current	View Remove

- To add a new user:
 - Click **Add**. New fields display.

- If the organisation user is as existing RRF user, you must enter their client number in the **User ID** field, otherwise left this field blank.
 - Enter **First name**, **Last name** and **Email Address** for the user.
 - If required and appropriate for this user, click the **User admin access** check box.
 - Click **Save**. The new user you added displays in the organisation users list.
4. To update details of an existing user:
 - Click **View** to display all details.
 - Click **Edit** and remove or add admin access for that user.
 - Click **Save**. You return to the organisation users list and the updated details display.
 5. To remove a user, click **Remove**. A confirmation message displays, click **OK**. You return to the Organisation users list and the user no longer displays.

Add or Update Delegations

You can set up someone else, (e.g. approved radio engineer (ARE) or certifier (ARC), or an agent) to manage your organisation's client record and licence.

The delegated user receives a confirmation email to advise they have been granted delegation to your record. They follow the email instructions to access RRF and accept (or reject) your invitation on their user account details screen.

1. Scroll down to the **Delegations** in the *Maintain Client* screen.
2. Click **Delegations** expand this section and review details of any **Active**, **Pending** and **InActive** delegations recorded for the client.

Note: This client currently has no delegations on their record.

3. To add a delegated user:
 - Click **Add**. The *Grant Delegation* screen displays.

- Select the option you require under **Delegation Type to be Granted**.
 - If you are adding a Radio Engineer, Certifier or Examiner:
 - Click in the **Select the name of the person you are granting delegation to** field and select the name of the person from the drop down list.
 - If you are adding an **Agent**:
 - In the **Find the user you are granting delegation to** field, start typing the User ID, First name and/or Last name or Email of the Agent.
 - Select their name from the list that displays.

- If you want to grant this user administration access, click the **Grant user Admin access** check box.
- Indicate the **Delegation Timeframe** for this person:
 - If there is no time limit on the delegation, click the **Indefinite** option.
 - If there is a time limit, click the **Set an end date** option, click and select the end date in the field that displays.
- Click **Save**. You return to the *Maintain Client* screen. A message displays to advise your delegation was successful.

Note: The delegated user receives a confirmation email to advise they have been granted delegation to your record with instructions how to access and accept (or reject) your invitation.

4. To view or update an active delegation:

- Scroll down to **Delegations** and click to expand and view the delegations list.

Delegations ^							+ Add
Active Delegations							
Name ↑	Delegation type	Started from	End date	Last updated by	Last updated date	Actions	
Gi Jane	Agent	11-Jul-2022		Radio Engineer (4081)	11-Jul-2022 08:35	Change end date	Revoke
Elon Musk ARE	Radio Certifier	11-Jul-2022		Radio Engineer (4081)	11-Jul-2022 08:54	Change end date	Revoke

- To change the Delegated timeframe for an active delegation:
 - Click **Change end date** next to the delegation. The *Please select a timeframe window* displays.

Please select a timeframe

Delegation Timeframe

Indefinite
 Set an end date

- Make the change, (e.g. select **Set an end date** and select the date.)
 - Click **OK**. To return to the **Active Delegations** list.
- To revoke an active delegation:
 - Click **Revoke** next to the delegation. A confirmation message displays.
 - Click **OK** to the confirmation message. The delegated user moves to the **InActive Delegations** list.

Delegations ^							+ Add
Active Delegations							
Name ↑	Delegation type	Started from	End date	Last updated by	Last updated date	Actions	
Elon Musk ARE	Radio Certifier	11-Jul-2022		Radio Engineer (4081)	11-Jul-2022 08:54	Change end date	Revoke
Pending Delegations							
There are no pending delegations for this client.							
InActive Delegations							
Name ↑	Delegation type	Status	Started from	End date	Last updated by	Last updated date	
Gi Jane	Agent	Revoked	11-Jul-2022	11-Jul-2022	Radio Engineer (4081)	11-Jul-2022 09:09	

Add a New Client

You must have performed a thorough search in the RRF for the client and determined that they don't already exist.

1. Perform a search for the client to check they are not already recorded in the RRF. (See [Check if the client is already recorded.](#))

Client numb	Status	Hidden	Type	Client name	Billing name	Residential/Physical address
503828	Active		Business	\$2 SHOP	\$2 SHOP	SHOP 33, GOLDFIELDS PLAZA, THAMES, NZ

2. If after performing a search, you cannot find the client:

- While in the *Search Client* screen, click **Add a New Client** to display the *Create Client* screen.
- Alternatively, select **Apply/Create > Client** (in the menu) to display the *Create Client* screen.

Basic details

Client type * Registered Company NZBN * Start typing to search for a NZBN

Organisation name * Billing name *

Default billing month * June Email(s) *

Include invoice with renewal email(s)?

Phone number(s)

Phone type * Country * New Zealand Code * 64 Area * Number *

Addresses

Residential/Physical Address Street name and number * Start typing to search for an address

Manually Enter Address:

Billing/Postal Address Billing/Postal address is the same with Residential/Physical address

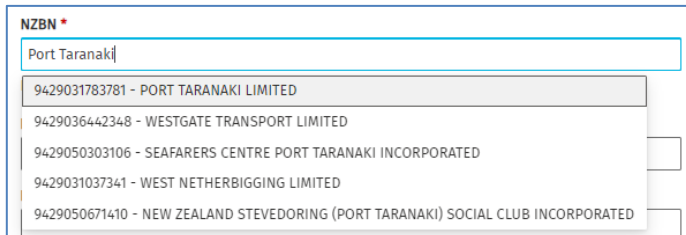
Note: The **Client type** field defaults to **Registered Company**.

- If the client is a **Registered Company, Charitable Trust, Incorporated Society** or **Limited Partnership**, go to [Record Registered Company, Charitable Trust, Incorporated Society or Limited Partnership](#).
- If the client is any other type of user (e.g. **Person**), go to [Record a Person or Other Client Type](#).

Record Registered Company, Charitable Trust, Incorporated Society or Limited Partnership

You are in **Basic Details** section of the *Create Client* screen.

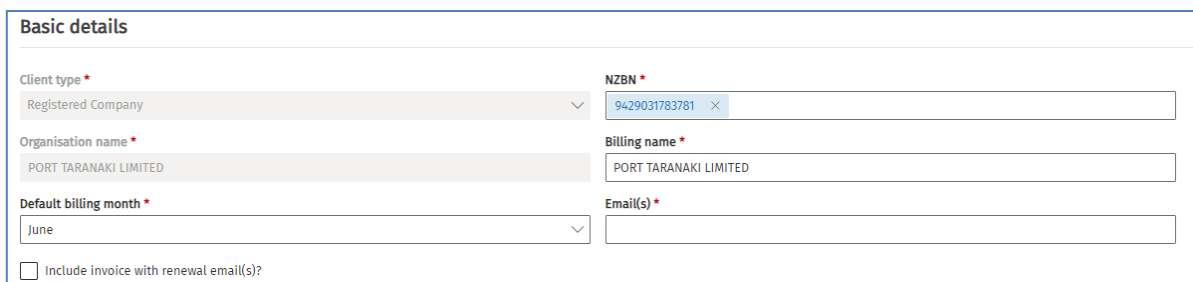
1. If the client is not a **Registered Company**, select either **Charitable Trust, Incorporated Society** or **Limited Partnership** as the type of client in the **Client type** field.
2. In the **NZBN** field, begin typing the name (or the beginning of the name) of the client. The system indicates it is searching. Wait for the system to obtain a list of names (from the Companies Office) and display them for you to select the company. For example, enter Port Taranaki:



The screenshot shows a search input field labeled 'NZBN *' with the text 'Port Taranaki' entered. Below the input field is a dropdown list of search results:

- 9429031783781 - PORT TARANAKI LIMITED
- 9429036442348 - WESTGATE TRANSPORT LIMITED
- 9429050303106 - SEAFARERS CENTRE PORT TARANAKI INCORPORATED
- 9429031037341 - WEST NETHERBIGGING LIMITED
- 9429050671410 - NEW ZEALAND STEVEDORING (PORT TARANAKI) SOCIAL CLUB INCORPORATED

3. Select the name of the company, trust, society name or partnership from the list, (e.g. Port Taranaki Limited). RRF populates the information in the **NZBN, Organisation Name** and **Billing name** fields.



The screenshot shows the 'Basic details' form with the following fields populated:

- Client type ***: Registered Company
- NZBN ***: 9429031783781
- Organisation name ***: PORT TARANAKI LIMITED
- Billing name ***: PORT TARANAKI LIMITED
- Default billing month ***: June
- Email(s) ***: (empty)

There is also an unchecked checkbox labeled 'Include invoice with renewal email(s)?'.

Note: This also populates details from the company record into the fields in the **Addresses** section below for the **Residential/Physical Address** and **Registered/Legal Address**.

- If the default name in the **Billing name** field differs from the billing name you require, change the details.
- The **Default billing month** defaults to the month prior to the creation date. See [Annual Fees](#) for more information.
 - If the client wants to receive an invoice with their annual fee renewal advice, tick the **Include Invoice with Renewal Email** check box and enter the relevant email address(es).

Note: Do not tick this check box if the client wants to register for direct debit payments.

4. Enter the email address for the client in the **Email(s)** field.
 - If required, record more than one address in this field and separate each email address with a comma (,).
5. Click **Save**. The screen name changes to *Maintain Client* screen and the **Direct Debit Details** button displays.
 - To apply to be a direct debit client now (you can apply later), click **Direct Debit**. Refer to [Request to register as a Direct Debit client](#).
6. Record phone number(s), the country defaults to New Zealand:

Phone number(s)

Phone type * Country * Code Area * Number *

Business New Zealand 64 4 4444444

Add

- Select the **Phone Type** and **Country**, and enter the **Code**, **Area** and **Number**.
- If you have another number to record, click **Add** and repeat this step.

7. Complete the **Addresses** section:

Addresses

Residential/Physical Address

Search Address

Street name and number *
2-8 Bayly Road

Suburb
Moturoa

City/Town
New Plymouth

Post code
4340 [Find Post Code](#)

Country *
New Zealand

Billing/Postal Address

Billing/Postal address is the same with Residential/Physical address

PO box or private bag number / Street name and number *
Start typing to search for an address

Manually Enter Address

Registered/Legal Address

Registered/Legal address is the same with Residential/Physical address

Search Address

Street name and number
2-8 Bayly Road

Suburb
Moturoa

City/Town
New Plymouth 4310

Post code
[Find Post Code](#)

Note: Check the details automatically populated from the Companies Office have been added into the correct fields, (e.g. the **Post code** may have been added into the **City/Town** field in error.)

- If required, remove the post code from the **City/Town** field and enter it into the **Post code** field. Check this in the **Residential/Physical Address** and in the **Registered/Legal Address**.
 - Record the **Billing/Postal Address** (if required) or tick the check box to indicate it is the same address as the Residential/Physical address.
8. Click **Save**. A message displays at the top of the *Maintain Client* screen to advise details were successfully updated.

Record a Person or Other Client Type

You are in **Basic Details** section of the *Create Client* screen.

1. Select the type of client in the **Client type** field, (e.g. **Person**).

Basic details

Client type * NZBN

First name * Last name *

Title Billing name *

Default billing month * Email(s) *

Include invoice with renewal email(s)?

2. Leave the **NZBN** field blank as this is not a registered entity.
3. Enter the **First name**, **Last name**, **Title** and **Billing name**.
4. Enter the email address for the client in the **Email(s)** field. If required, record more than one address in this field and separate each email address with a comma (,).
 - The **Default billing month** defaults to the month prior to the creation date. See [Annual Fees](#) for more information.
 - If the client wants to receive an invoice with their annual fee renewal advice, tick the **Include Invoice with Renewal Email** check box and enter the relevant email address(es).

Note: Do not tick this check box if the client wants to register for direct debit payments.
5. Click **Save**. The screen name changes to *Maintain Client* screen and the **Direct Debit Details** button displays.
 - To apply to be a direct debit client now (you can apply later), click **Direct Debit**. Refer to [Request to register as a Direct Debit client](#).
6. Record phone number(s), the country defaults to New Zealand:

Phone number(s)

Phone type * Country * Code Area * Number *

Add

- Select the **Phone Type** and **Country**, and enter the **Code**, **Area** and **Number**.
 - If you have another number to record, click **Add** and repeat this step.
7. Complete the **Addresses** section:

8. Enter address details in the **Residential/Physical Address** and **Billing/Postal Address** fields, only.
 - If the billing address is the same as the residential/physical address, tick the check box to indicate it is the same address as the Residential/Physical address.
9. Click **Save**. A message displays to advise you record has been saved.

Request to register as a Direct Debit client

Follow these steps to register as a direct debit client.

1. View the client record in the *Maintain Client* screen and click **Edit**.

Note: If you are adding a new client (using the *Create Client* screen) complete the **Basic Details** section of the record and click **Save** to display the *Maintain Client* screen.

2. Click **Direct Debit Details**. The *Direct Debit Account Setup* screen displays in QuickPay.

Setup Direct Debit

Direct Debit Account Setup

Bank Account Name*

Bank Account Number

Bank (2)* Branch (4)* Account (7)* Suffix (2-3)*

Email Address for Direct Debit Form*

Email Address for Correspondence*

The Next Step

On saving your new bank account details you will be emailed a direct debit form which you need to complete, sign and post or email back to us (our postal address is on the form).

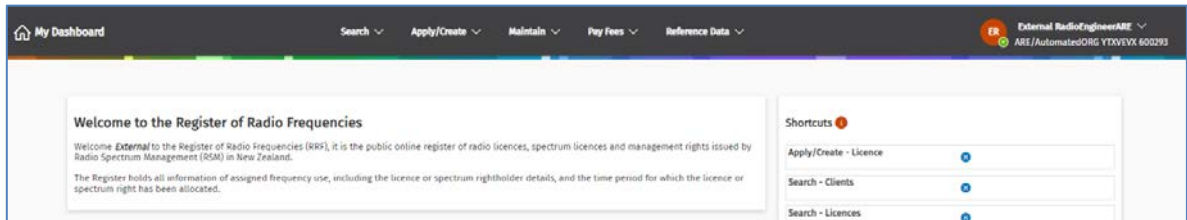
3. Enter the **Bank Account Name** and **Bank Account Number**.
4. The two email address fields default to the address recorded on the client record. Change if required.
5. Click **Save**. You return to the *Maintain Client* screen.
 - A direct debit form to complete and return will be emailed to the **Address for Direct Debit Form** you entered in this screen.

Change My User Account Settings

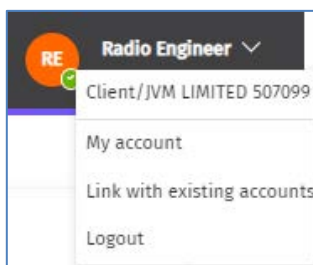
After you login to the RRF using RealMe, you can make updates to some of your details, (e.g. phone number, default role, user preference settings).

An ARC or ARE can change their roles while logged into the RRF and can set a default role to display each time they login, (e.g. RSM Radio Engineer, Client).

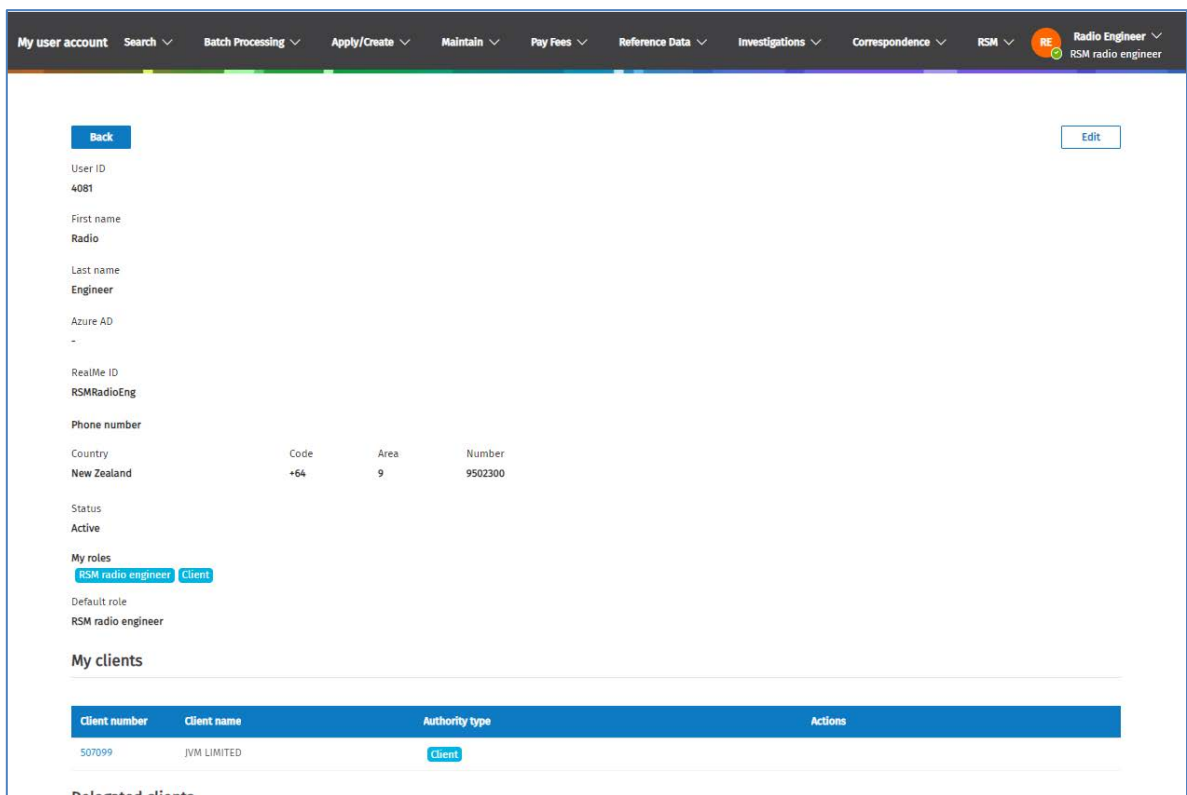
1. Login to the RRF to display the 'My Dashboard' screen.



2. Click the drop down arrow next to your account name (in the top right of the screen):



3. Select **My Account**. The *My User Account* screen displays.



4. Click **Edit** and make the updates required:

Phone number

Country * Code Area * Number *

New Zealand 64 9 9502300

Status *

Active

My roles

RSM radio engineer Client

Default role *

RSM radio engineer

My clients

Client number	Client name	Authority type	Actions
507099	JVM LIMITED	Client	

Note: If you have more than one role, these will be listed under **My Roles** and the list of your clients will display under **My Clients**.

- Update your phone number details, if required.
 - To change the default role to display each time you login to the RRF, select the role in the **Default Roles** field, (e.g. to change from RSM to a Client).
5. To change your preferences, scroll down the screen to the **User preference settings** and update as required:

User preference settings

Search results per page

20

Preferred sort order

Search licences

Licence Id Ascending Descending

Area search licences

Distance (km) Ascending Descending

Search management rights

Low frequency Ascending Descending

Search certificates

Certificate number Ascending Descending

Search callsigns

Callsign Ascending Descending

Search AtoNs

MMSI Ascending Descending

Search clients

Client name Ascending Descending

Location setting

Default geo-ref type

TOP050

File note and attachment

Event log

- Select the number of **Search results per page to display** from the drop down list.
 - Under the **Preferred sort order**, click the **Ascending** or **Descending** radio button you require for each type of search listed.
 - Select the **Default geo-ref type** setting from the drop down list.
6. Click **Save**. A message displays at the top of the *Maintain Client* screen to advice details were successfully updated.

Note: Any error messages when you save will also display at the top of the screen. You will need to correct these errors and save again.