# Supplementing and Amending ICS Client Register Details - a quick guide

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## Overview

This guide outlines the steps involved in supplementing and amending registration details in the ICS.

Before these steps can be undertaken, direct electronic communicators must have completed the digital certificate and client registration processes as detailed in the 'Digital certificate and client registrations - revised processes' fact sheet.

You are responsible for the accuracy of information you supply to Customs. It is important that you ensure the correctness of the information before it is communicated.

Further detail on the information covered by this guide can be found in module 1 of the Industry Client Manual, available from www.customs.gov.au.

## Accessing the Client Summary View screen

In the ICS, all changes to client records are performed from the Client Summary View screen accessed via CI.

1. Access the Customs Interactive facility at https://www.ccf.customs.gov.au or select the hyperlink emailed to you by Customs.

The Customs Interactive home page displays.

2. From the main menu, click on **ICS Production**.

The ICS home page displays.

3. From the main menu, click on **Client** and then click on **Summary**.

The **Client Summary View** screen displays.

## Supplementing/amending EDI details

Each client (including clients only using Customs Interactive) must add at least one EDI site upon initial registration to the ICS.

1. From the Client Summary View screen, click on the **EDI Sites** hyperlink.

The **EDI Site List** screen displays.

2. Click on a **Add** button.

The **EDI Site Create** screen displays.

3. In the **Interaction Preference** field, click on the drop down button and select either **Interact with Customs via EDI Software and the Web** or **Interact with Customs via the Web only**.
4. Complete the details (refer to Table 1 ('Interact with Customs via EDI Software and the Web') or Table 2 ('Interact with Customs via web only') for field descriptions).
5. Click on the **Submit** button.

A confirmation message displays.

6. Click on the **OK** button.

The **EDI Site List** screen displays with the updated details.

**Note: to add additional EDI sites, refer to step 2**

7. Click on the **Back** hyperlink.

The **Client Summary View** screen displays.

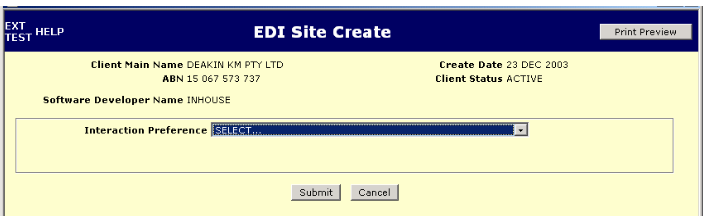


**Table 1 - Interact with Customs via EDI Software and the Web fields**

| Field | Action/input required |
|---|---|
| **EDI Site Name** | Enter the name given to your EDI Site.<br>**Note:** if you do not know the details of the EDI site/email address, contact your software developer for assistance. |
| **Default Site** | Select the Default Site checkbox if this site is going to be the default site. **Note:** only available if this site is not already the default site.<br>Initially, your default EDI site will be the first EDI site created by Customs during CCF registration. |
| **Text E-mail Address** | Enter the address for the client that will be used for plain text outbound messages.<br>It is important that the address in this field is the same as an email address on your digital certificate(s). This will be the address that text messages are sent to (from Customs) if the EDI Reply Preference is set to 'Reply to Preferred Address'. |
| **EDI E-mail Address** | Enter the email address for the clients that will be used for outbound EDI messages.<br>It is important that the address in this field is the same as an email address on your digital certificate(s). This is the email address that will be used for outbound message processing from Customs to clients who are using EDI software. |
| **EDI Reply Preference** | Click on the drop down button and select **REPLY TO PREFERRED ADDRESS** or **REPLY TO SENDER**.<br>If you have one EDI site, select 'Reply to Preferred Address'.<br>If you have more than one EDI site:<br>-'Reply to Preferred Address' is the preferred EDI Site for the role relevant to the message type (details TBA) or, if there is no preferred EDI Site, the default EDI site.<br>-'Return to Sender' means that the response is sent to the Sender EDI Site ID and the email address in that site, not necessarily the sender email address. |
| **Format Preference** | Click on the drop down button and select either **TEXT** or **EDI**. 'EDI' means that messages sent from Customs will be in an EDI specific format suitable for clients with EDI software.<br>'Text' means that messages sent from Customs will be in a format suitable for a person to read, but which an EDI server will not recognise. |
| **Maximum Message Count** | Due to current system requirements, ensure that **1** is entered. |
| **Maximum Time Period (seconds)** | Due to current system requirements, ensure that **1** is entered. |

**Table 2 - Interact with Customs via Web only fields**

| Field | Action/input required |
|---|---|
| **EDI Site Name** | Enter the name of the site where you access Customs Interactive. If unsure, enter the name of the suburb where your computer is located. |
| **Text E-mail Address** | Enter the email address where plain text emails are to be sent. It is important that the address in this field is the same as an email address on your digital certificate(s). |

## SUPPLEMENTING/AMENDING CONTACT DETAILS

Customs will enter default contact details for all client they register in the ICS. Each client must review these details upon initial login to the system, and then supplement or amend the details if necessary.

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1. From the Client Summary View screen, click on the **Contacts** hyperlink.

The **Client Contact List** screen displays.

2. Click on a hyperlink in the Name column.

The **Client Contact View** screen displays.


Depending on the information contained in the record, from the Client Contact View screen it is possible to:

- amend the fields displayed
- add additional address types (ie, phone number, email address etc)
- delete an incorrect address
- exit this screen.

### AMENDING THE FIELDS DISPLAYED

1. Click on the **Amend** button.

The **Client Contact Amend** screen displays.

2. Make the required changes to the available fields.
3. Click on the **Submit** button.

The **Client Contact View** screen displays with the updated details.

### ADDING ADDITIONAL ADDRESS TYPES

Each contact can only have one of each of the address types. For example, each contact may only have one business address, business phone number and email address.

1. In the **Address Type** field, click on the drop down button and select the type of address to be added.
2. Click on the **Add** button.

The relevant **Client Contact Address Add** screen displays.

3. Populate the relevant fields on the Client Contact Address Add screen.
4. On the Client Contact Address Add screen, click on the **Submit** button.

A confirmation box displays.

5. Click on the **OK** button.

The **Client Contact View** screen displays.

To add further addresses for this contact, repeat this process.

### DELETING AN INCORRECT ADDRESS

1. Click on the relevant **Delete** button for the incorrect address.

A confirmation box displays.

2. Click on the **OK** button.

The **Client Contact View** screen displays with the updated details.

### EXITING THIS SCREEN

1. To return to the Client Summary View screen, click on the close window button.

The **Client Summary View** screen displays.

## SUPPLEMENTING/AMENDING CLIENT ROLE DETAILS

Different roles allow different access to the ICS. Customs will enter a default role of 'exporter' for clients that they register. The client role details must be amended to reflect the correct role/s of the client. Clients will not be able to select any licensed roles. Customs will add these as appropriate on their behalf.

1. From the Client Summary View screen, click on the **Add** button.

The **Client Role Add** screen displays.

2. In the **Role Name** field, click on the drop down button and select the relevant role.

Depending on the role selected, different fields may display.

3. Complete the fields displayed (refer to Table 3 for field descriptions).
4. Click on the **Submit** button.

A confirmation box displays.

5. Click on the **OK** button.

The **Client Summary View** screen displays with the updated details.

**Table 3 - Possible screen fields**

| Field | Action/input required |
|---|---|
| **EXDOC User** | Select this checkbox if you are a user of the EXDOC system with the Australian Quarantine Inspection Service (AQIS). |
| **Preferred EDI Site** | Click on the drop down button and select the appropriate EDI site for the location where messages relating to the role selected should be sent. |
| **Port Code** | Enter the Port Code (UNLocode). ICS messages sent for this port will be sent to the EDI Site chosen below. |
| **EDI Site** | Click on the drop down button and select your EDI site for the port code entered. |

## AMENDING OTHER DETAILS

Other details that can be amended are navigated to from hyperlinks within the Other Client Information section of the Client Summary View screen.

1. Ensure the Client Summary View screen is displayed.
2. In the **Other Client Information** section, click on each of the hyperlinks, review the details displayed and amend if required.