

# Service Provider How-to guides

## Contents

→ How to register as a Service Provider	2
→ How to log in to your account	6
→ How to create a Training Service	7
→ How to respond to a proposal request	10
→ How to create an Event	14
→ How to claim for delivery of a Service	17
→ How to add a team member	21

October 2023



# Register as a Service Provider

## Before you start

### You'll need a New Zealand Business Number (NZBN)

Don't have one? Go to [nzbn.govt.nz](http://nzbn.govt.nz) and create one.

You may need to wait up to 24hrs after creating an NZBN before registering with RBP while our systems sync.

### Professional Indemnity Insurance

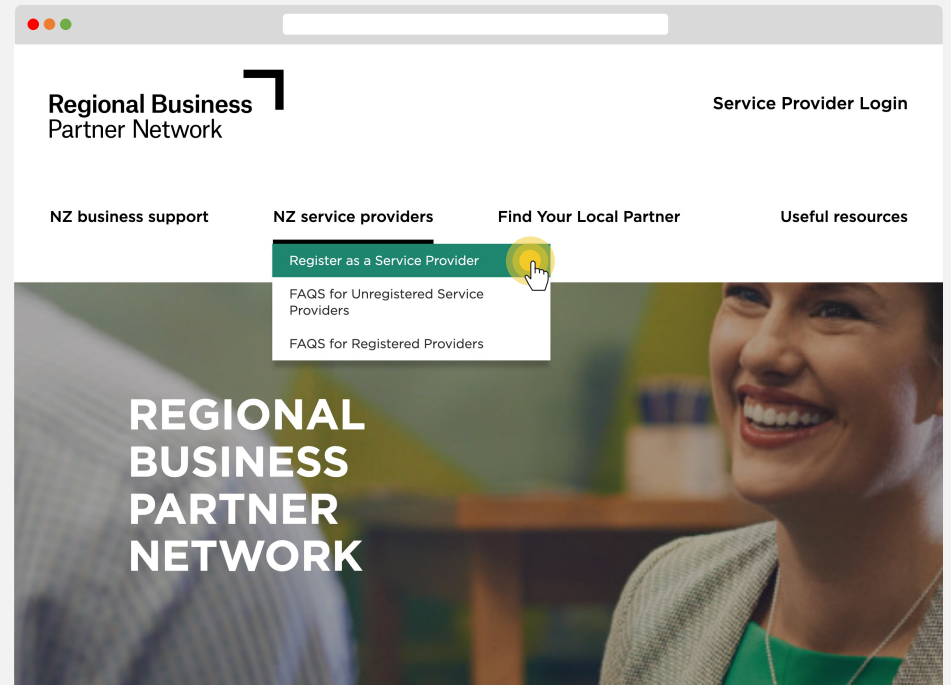
A minimum **\$1 million** is a mandatory Government requirement.

## Step 1

Visit [regionalbusinesspartners.co.nz](http://regionalbusinesspartners.co.nz).

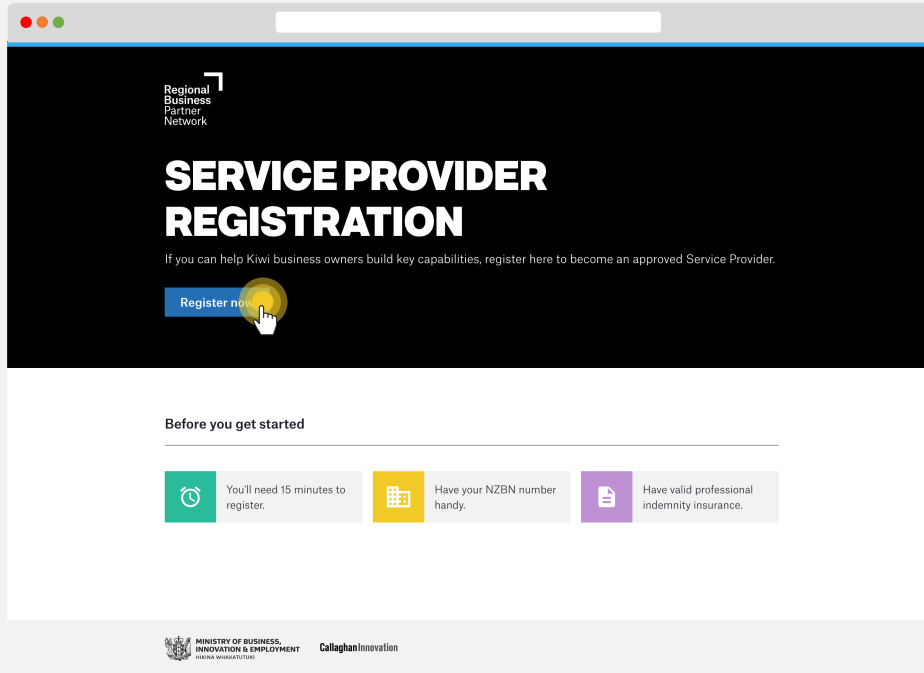
Hover mouse over **NZ service providers** for the drop-down menu to reveal.

Click **Register as a Service Provider**.



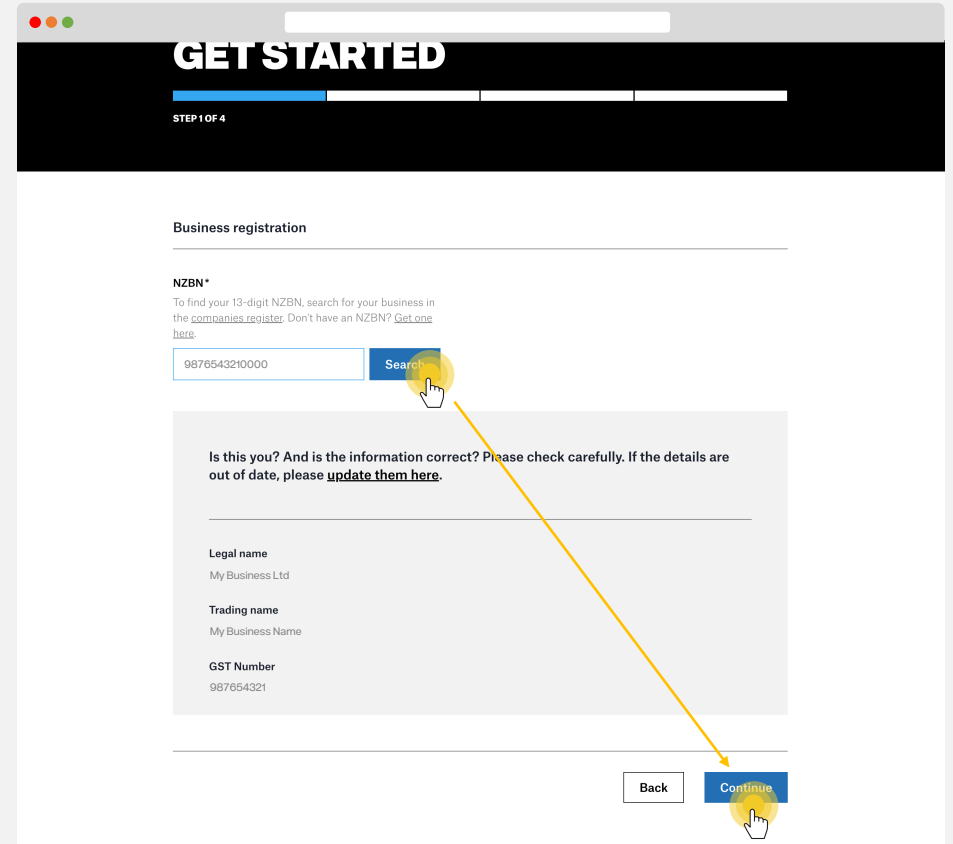
Step 2

Click [Register now](#).



Step 3

Enter your **13-digit NZBN** and then click **search**. Check your business details are correct and then click **continue**.



Step 4

Complete your **business details** in the online form.

The screenshot shows a web form titled "Business details". It includes several sections: "Is your business GST registered?" with radio buttons for "Yes" (selected) and "No"; "What is your GST number?" with a text input field; "Physical address\*" with fields for "Street number/name", "Suburb", "Other", "City", and "Postal Code"; "Website\*" with a text input field; "What is your organisation's core service offering?" with a large text area and a blue callout box stating "This is the type of training you provide"; "Tell us about your experience providing training to customers.\*" with a large text area; and "What relevant qualifications or accreditations do you have?\*" with a large text area. A horizontal line is drawn across the form, with arrows pointing to the "Website\*" and "What is your organisation's core service offering?" fields.

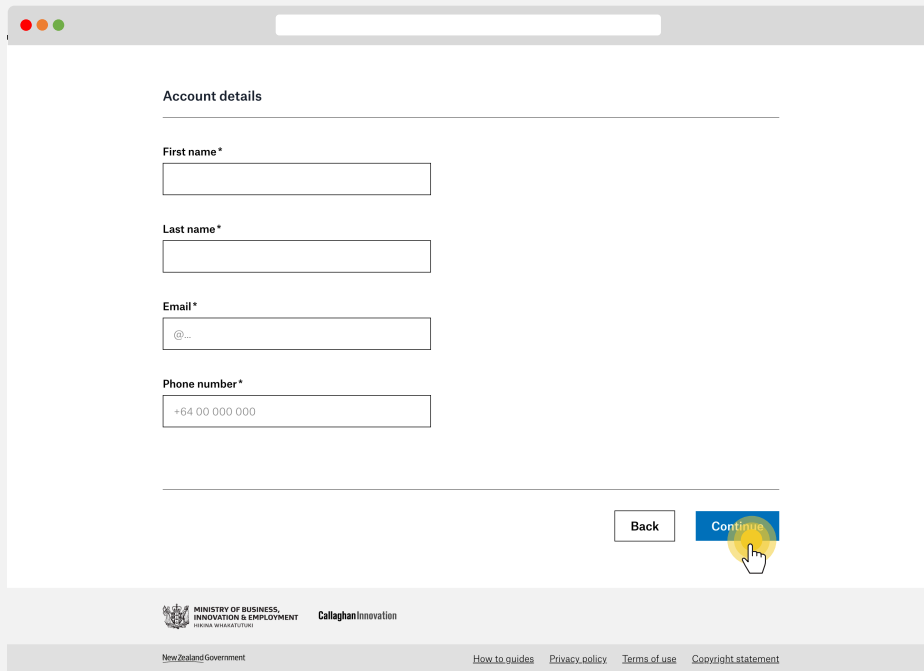
Step 5

Upload your **Professional Indemnity Insurance Certificate** (minimum of \$1 million). Download and read the **terms and conditions** and confirm you agree to them. Complete the other fields and then click **Continue**.

The screenshot shows a web form titled "Acceptance of Ministry of Business, Innovation and Employment Terms and Conditions for MY BUSINESS LIMITED". It includes the following sections: "To provide services via the Regional Business Partner network, we require you to agree to our terms and conditions and provide proof of your professional indemnity insurance. You will be asked for these on an annual basis whilst registered with us."; "Do you hold Professional Indemnity insurance cover of minimum NZD \$1million?\*" with radio buttons for "Yes" and "No"; "Please provide proof of your current indemnity insurance cover\*" with a blue button labeled "Upload indemnity insurance certificate" and a yellow callout box with a hand icon pointing to it; "Terms and conditions" with a blue button labeled "Download latest terms and conditions" and a yellow callout box with a hand icon pointing to it; "I agree to the MBIE Special Terms and General"; "Authority\*" with a checkbox and the text "I certify that I have the authorisation of the business named above to submit information to MBIE and that the information I submit is true and correct."; and "Back" and "Continue" buttons at the bottom right. A horizontal line is drawn across the form, with arrows pointing to the "Upload indemnity insurance certificate" and "Download latest terms and conditions" buttons, and another arrow pointing to the "Continue" button. The Ministry of Business, Innovation and Employment logo and "Callaghan Innovation" are visible at the bottom.

Step 6

**Complete your account details.** This is for the person we can communicate with, including emailing our regular newsletter. This will also be the email address used to login to the RBP Platform. Click **Continue**.



Account details

First name\*

Last name\*

Email\*

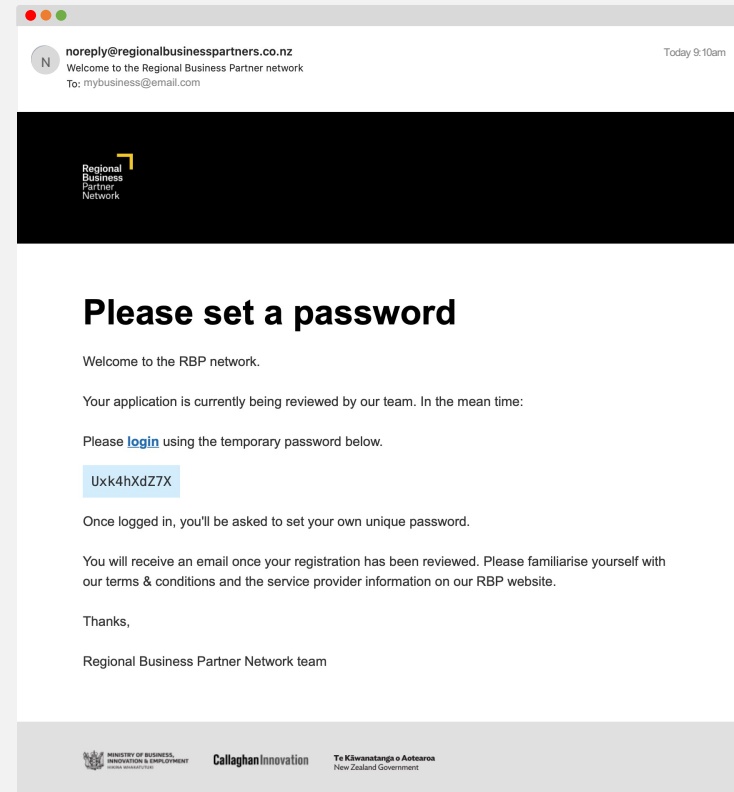
Phone number\*

Back Continue

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT  
Callaghan Innovation  
New Zealand Government  
How to guides Privacy policy Terms of use Copyright statement

Step 7

You'll be sent an email with a link to **create a password** for your account. Check your junk/spam email if you don't receive this email in your inbox.



Your details will be reviewed, and you'll receive an email **confirming if your registration has been approved**.

# Log in to your account

Visit [www.regionalbusinesspartners.co.nz](http://www.regionalbusinesspartners.co.nz)

Click the **Service Provider Login** button.

**Enter your credentials** into the login screen

Click **Log in**

## Pro tip

Bookmark this address to go straight there:

[web.regionalbusinesspartners.co.nz](http://web.regionalbusinesspartners.co.nz)

Regional Business Partner Network

Service Provider Login

NZ business support    NZ service providers    Find Your Local Partner    Useful resources

REGIONAL BUSINESS PARTNER NETWORK

**We're here to support your business to recover and grow**

We're here for New Zealand's small-to-medium business owners. Perhaps you're facing some challenges and would like some help to work through them. Or maybe your business is tracking well, and you're keen to grow to the next level.

The Regional Business Partner Network is a gateway that connects you to the right advice, people and resources. Working together, we can help you strengthen and grow your business in many different ways.

Funded by the New Zealand government, the RBP Network consists of 14 regional growth agencies

Regional Business Partner Network

Regional Business Partner platform

[Don't remember your password?](#)

LOG IN >

# Create a Training Service

## Before you start

### Does your service meet the criteria?

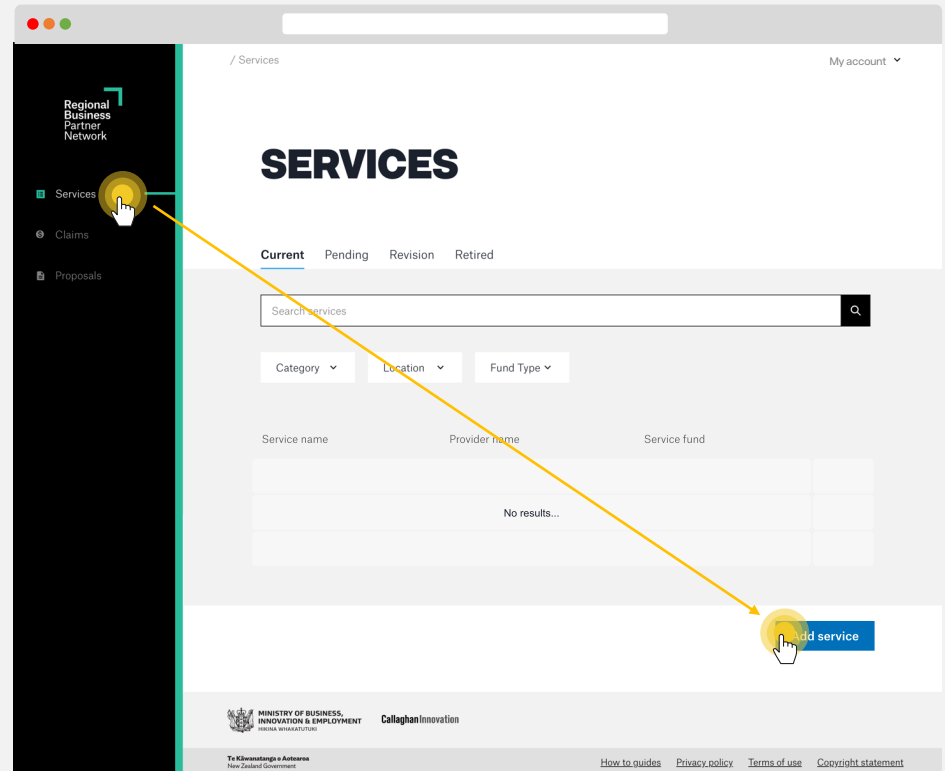
Your training service must meet the eligibility criteria for the RBPN Management Capability Fund – find out more here: [Eligible service subjects](#).

### Categorize your service carefully.

Please check your information carefully, the fund type, and price type of your service can't be edited after it is created.

## Step 1

Select **Services** in the navigation menu and click the **Add service** button.



Step 2

Complete the details in **Create a Service**.

**CREATE A SERVICE**

**Service name\***  
This is the name business owners will see. **Enter a Service Name** that best describes the type of service you deliver, for example Marketing Strategy training.

**Service overview\***  
Briefly describe your service - what's the elevator pitch? **In the Service Overview** write a short description (one or two sentences) of the service. Maximum character count is 500.

**Service description\***  
Give a fuller outline of your service. Describe the key elements and what benefit participants will gain. This outline will help our Growth Advisors identify whether your service is right for a customer. **Write your Service Description.** This must meet the eligibility criteria for the Management Capability Fund. Provide information about the training objectives, the learning outcomes (these must be measurable), the total cost + GST, how the service is delivered (e.g. workshop, in-person, online) and the total time commitment for the business owner/manager. Maximum character count is 2000.

**Fund type\***  
Choose the fund you'd like your service offered under. **Select the appropriate fund type** in the drop-down box.

**Service category\***  
Choose the category that best fits your service (up to 3). **Tick the Service Category** (you can select a minimum 1, to a maximum of 3) that best describes your service.

**Price type\***  
Will you offer the service to one customer at a time, or many? Per-business pricing means you can only offer the service to one business at a time. Per-person pricing gives you the flexibility to offer the service to more than one business at a time.

Choose the category that best fits your service (up to 3).

Please choose Fund type above

**Price type\***  
Will you offer the service to one customer at a time, or many? Per-business pricing means you can only offer the service to one business at a time. Per-person pricing gives you the flexibility to offer the service to more than one business at a time. **Select the Price Type - per business or per person**

Per-business  
 Per-person

**Hourly Rate\***  
What's the hourly rate you'd usually charge for this service? **Add the Hourly Rate** that is charged for the service.

\$

**Regions that this service can be provided in\***  
**Tick the Regions** this service can be provided in.

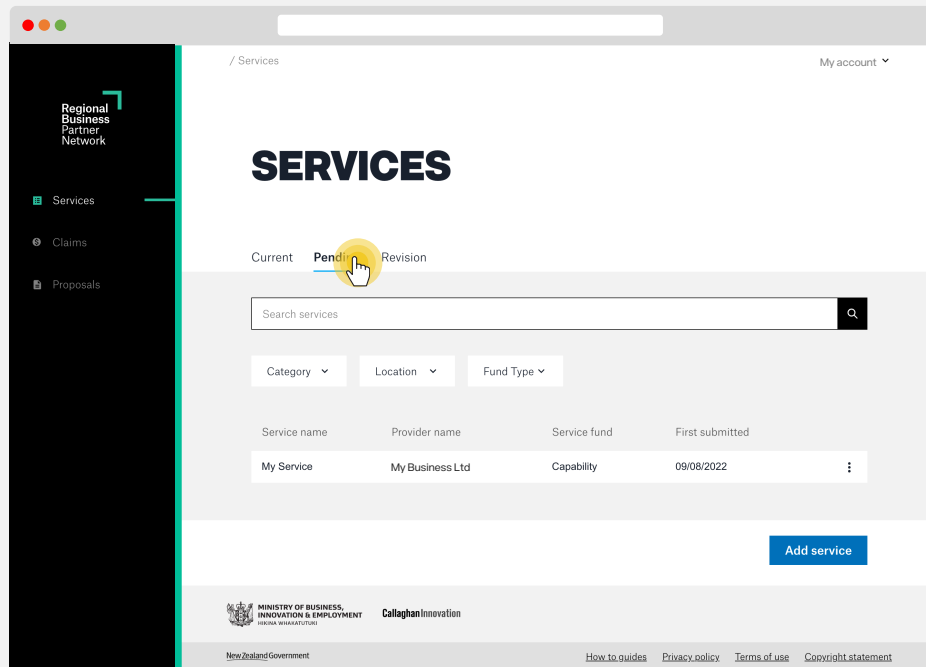
Auckland  
 Bay Of Plenty  
 Canterbury  
 East Coast  
 Hawke's Bay  
 Manawatu Wanganui  
 Marlborough Nelson Tasman  
 Northland  
 Otago  
 Southland  
 Taranaki  
 Waikato  
 Wellington  
 West Coast

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT  
Callaghan Innovation  
New Zealand Government  
How to guides Privacy policy Terms of use Copyright statement



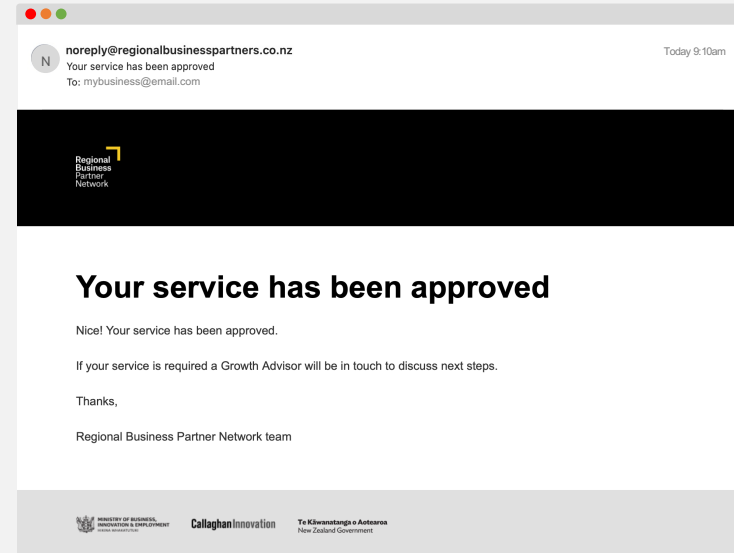
Step 3

The newly created service will be visible on the **Pending** tab until it has being reviewed by the RBPN team. Pending services are visible to Growth Advisors and can be escalated for priority review if required for a customer.



Step 4

You will be sent an email when your **service is approved or denied**.



**How to remove or retire a service**

Open the Current or Pending service.

Click on the **Actions** dropdown to the right of the page, and from the dropdown select **Retire service**.

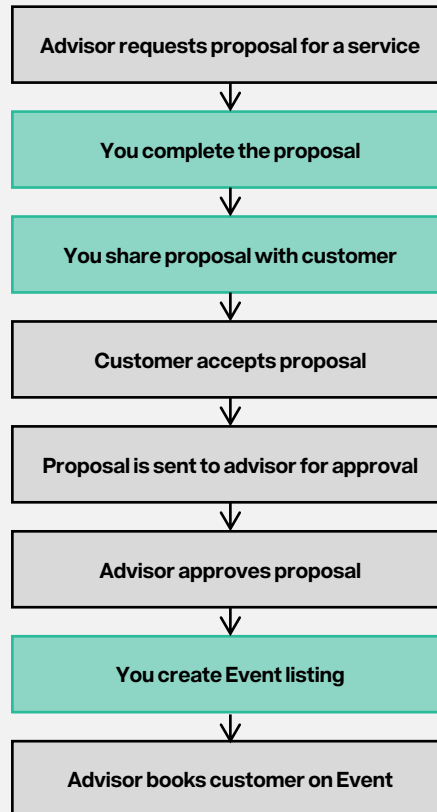
# Respond to a proposal request

## Before you start

### Has an advisor requested a proposal?

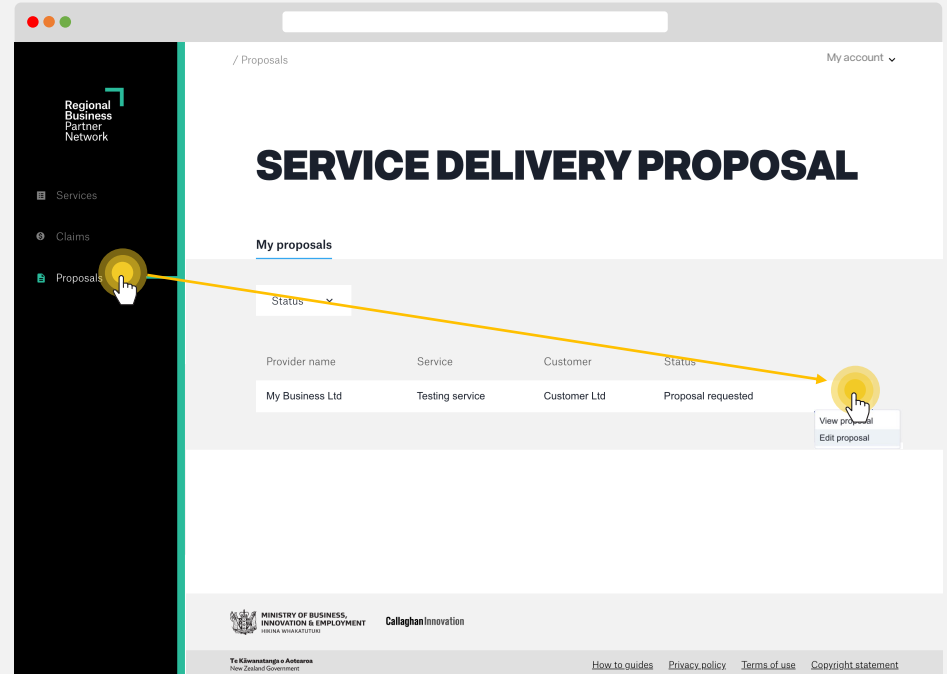
To be able to respond to a proposal request, first you'll need the customer's advisor to request one.

### Standard flow for a proposal



## Step 1

Select **Proposals** in the navigation menu and click the **Edit Proposal** from the (:) menu.



Step 2

Complete the **Customer details** and click **Continue**.

Step 3

Complete the **Service details** then click **continue**.

Step 4

Complete the **cost and scope** and click **Continue**.

[← Back](#)

# COST AND SCOPE

1. Customer details 2. Service details 3. Cost and scope 4. Customer benefits 5. Review

STEP 3 OF 5

**Price type \***

Per person

Fixed

**How many people does the service proposal cover?\***

Co-funding is only eligible for the senior management or owners of customer businesses.

**What is the total cost (GST inclusive) of the service in this proposal?\***

Include parts that are not eligible for co-funding. [Information of what's eligible for funding](#)

\$

**How much of the total cost (above) is eligible for co-funding?\***

Exclude costs not eligible for co-funding

\$

**How will this time will be used?\***

Outline additional detail regarding how the total cost has been calculated. If this is a customised program based on an hourly or daily rate, please outline how this cost has been calculated. For example:

1 day workshop @ \$XX total/per person  
3 x 2 hours coaching session @XX/hr  
3 monthly meetings @SXX/meeting  
\$XX per person or Financial literacy coaching session 2 x 1 hr

Use the prompts to understand what type of information is useful in these fields.

Step 5

Complete the **Customer benefits** then click **Continue**.

[← Back](#)

# CUSTOMER BENEFITS

1. Customer details 2. Service details 3. Cost and scope 4. Customer benefits 5. Review

STEP 4 OF 5

**Outline the identified customer needs and how this service relates to it\***

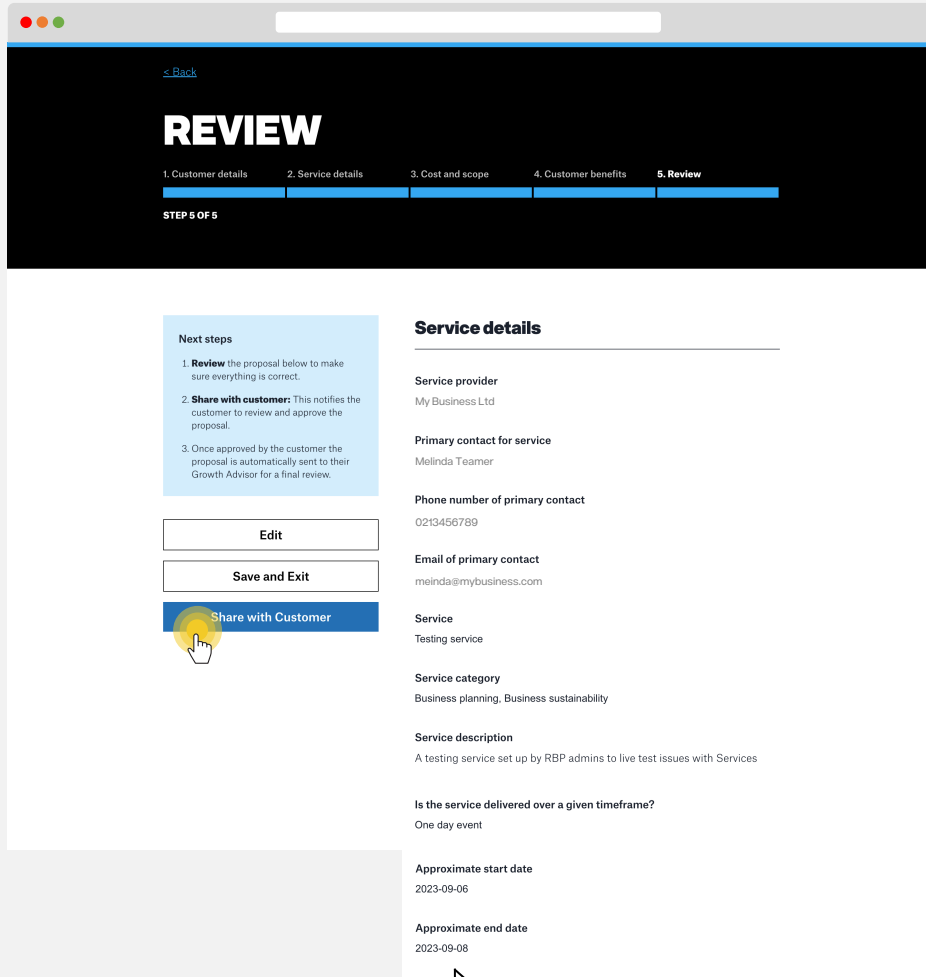
Why is this service right for this customer?

**What are the key learning outcomes for the customer \***

Please provide 3-4 bullet-pointed outcomes

Step 6

Review your proposal and share it with your customer.



## Frequently asked questions

### What happens next?

When you click **share with Customer**, the customer is sent a copy of the proposal. They can review and accept the proposal.

### Can I save and exit?

Currently it is only possible to save your proposal from the **Review** step. If you make an edit to an earlier step, make sure you progress to the Review step to save your edit.

### Can I make edits to a proposal I've already shared with my customer?

You can edit and reshare a proposal with a customer at any point prior to it being approved by the growth advisor.

### How long are proposals viewable for?

For security reasons, a customer's link to a proposal expires after 14 days. However, a proposal can be reshared, generating a new link for the customer to view the proposal.

### What happens if my customer doesn't like the proposal?

We recommend you work with your customer to work out what needs adjusting. Once adjusted, you can reshare the proposal with them.

### What happens if the growth advisor declines my proposal?

You can edit and reshare a proposal with a customer after a proposal has been declined. We recommend you have a discussion with the growth advisor about why they declined your proposal.

### How will I know if my proposal has been accepted or declined?

You will receive an email when your proposal has been accepted or declined.

# Create an Event

## Before you start

### What is an Event?

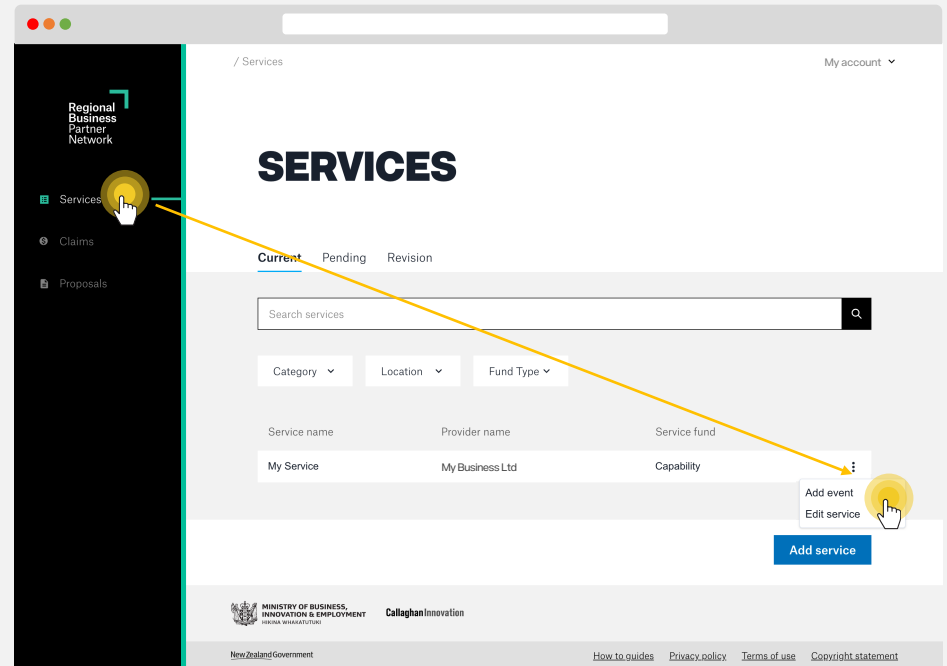
Events are a one-off delivery of a registered service. A Growth Advisor will request you create an event after a customer has chosen your service and is allocated funding. The Growth Advisor will provide details of who the customer is and how much they are funded for.

### Pro tip

From the services dashboard you can quickly access tasks such as *Add Event* and *Edit Service* by **clicking on the three dots (:)** as shown in Step 1.

### Step 1

Select **Services** in the navigation menu and select one of your registered services. Click on the **three dots (:)**, and then click **Add Event**.



Step 2

Complete the details in **Create a Service** and click **Create event**.

The screenshot shows the 'CREATE AN EVENT' form. The breadcrumb is '/ Services / Service / Add event' and the user is logged in as 'My account'. The form title is 'CREATE AN EVENT' with a sub-header 'This is a one-off delivery of the service you've created.' The form includes the following fields and options:

- Start date \***: A date input field with a placeholder 'dd/mm/yyyy' and a calendar icon. A blue callout box points to the icon with the text 'Click on the calendar icon to select a date'.
- End date \***: A date input field with a placeholder 'dd/mm/yyyy' and a calendar icon.
- Delivery type \***: Radio buttons for 'Online' and 'In Person'.
- Instructor \***: A text input field.
- Instructor email \***: A text input field.
- Instructor phone**: A text input field (partially visible at the bottom).

The screenshot shows the right side of the 'CREATE AN EVENT' form. The fields and options are:

- Instructor phone**: A text input field.
- Event type \***: A note 'A fixed price event must be private.' and radio buttons for 'Public' and 'Private' (selected).
- Select customer \***: A dropdown menu with a 'Search...' placeholder. A blue callout box points to it with the text: 'If this is a one-to-one service, select private in the event type and then start typing the legal name of the customer in the box provided. Their business name should reveal in the dropdown list for you to select.'
- Price \***: A note 'Let business owners know how much this specific event costs.' and a text input field with a '\$' symbol.
- Number of places available \***: A note 'How many people can book your event? You can change this number before the event starts.' and a text input field.

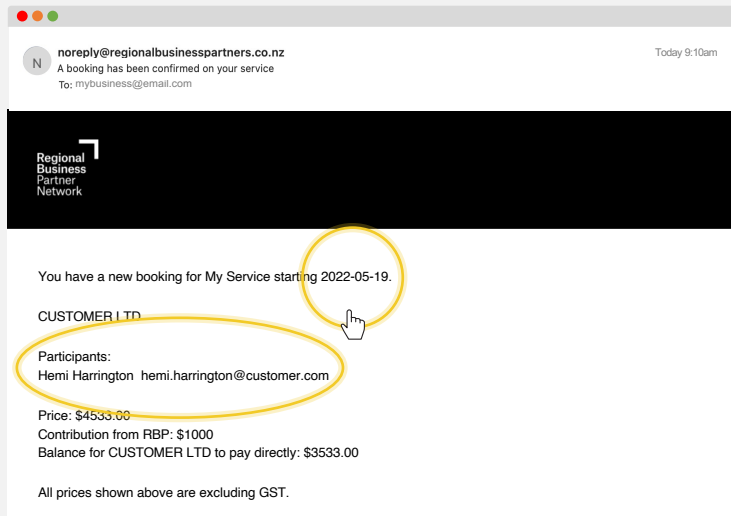
At the bottom right, there are 'Cancel' and 'Create event' buttons. A yellow callout box with a hand icon points to the 'Create event' button.

At the bottom of the page, there is a footer with the New Zealand Government logo, 'MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT', 'Callaghan Innovation', and 'New Zealand Government'. On the right, there are links for 'How to guides', 'Privacy policy', 'Terms of use', and 'Copyright statement'.

Step 3

The customer is sent an email asking for confirmation of their participation in the event and agreement to the terms and conditions of the event. This needs to be completed **within 14 days**, otherwise the booking expires.

A **confirmation email** will be sent to you **when the customer has confirmed the booking**. Check the event details to see the names of the people who have confirmed their attendance.

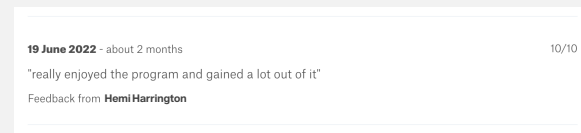


Step 4

The delivery of the service takes place.

Step 5

The customer is emailed after the event end-date asking them to provide feedback about the training service. If they choose to respond, their comments will be available to read at the bottom of the specific service page.





# Claim for delivery of a service

## Frequently asked questions

### Can I claim for a partially delivered service?

Claims can be made for a **part-payment** or for **full payment**.

For part-payment claims, you can claim for the portion of work completed to date. Once Sent for Payment, the balance will become available for claiming.

### Who do I invoice first?

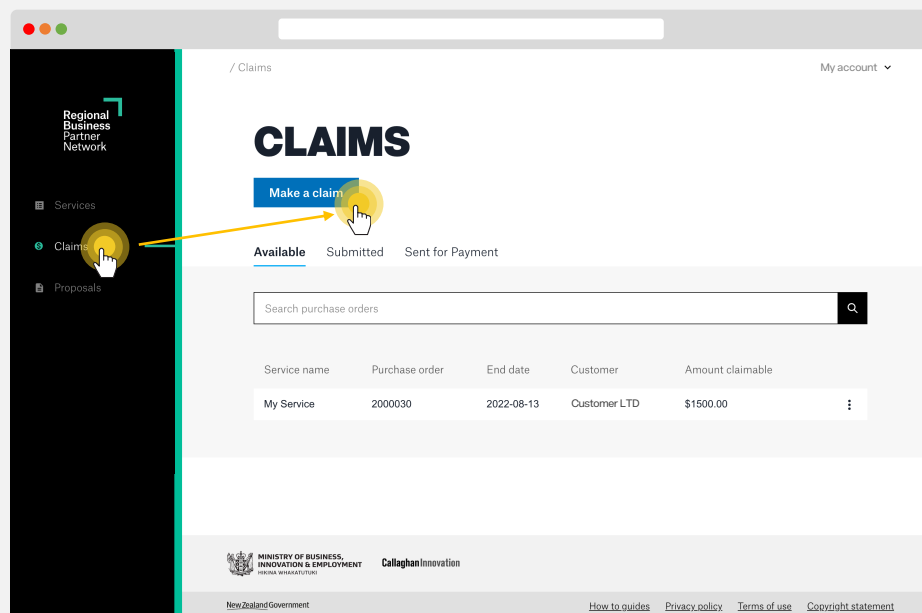
The customer **must be invoiced** for their contribution **before claiming** for Management Capability Fund training services.

### When can I make the final claim?

**Full and final claims** can only be made after the event **has been completed**.

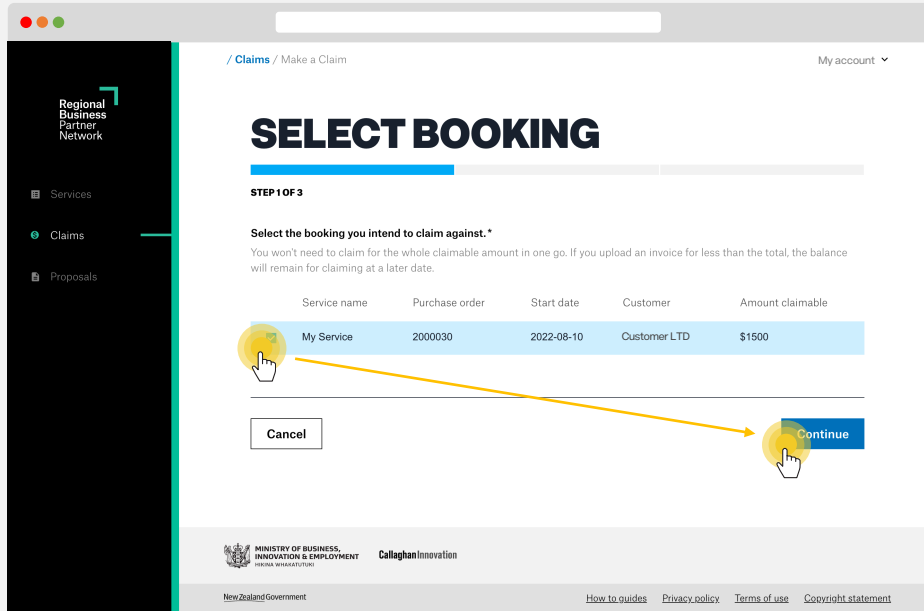
## Step 1

Select **Claims** in the navigation menu. Click on **Make a claim**.



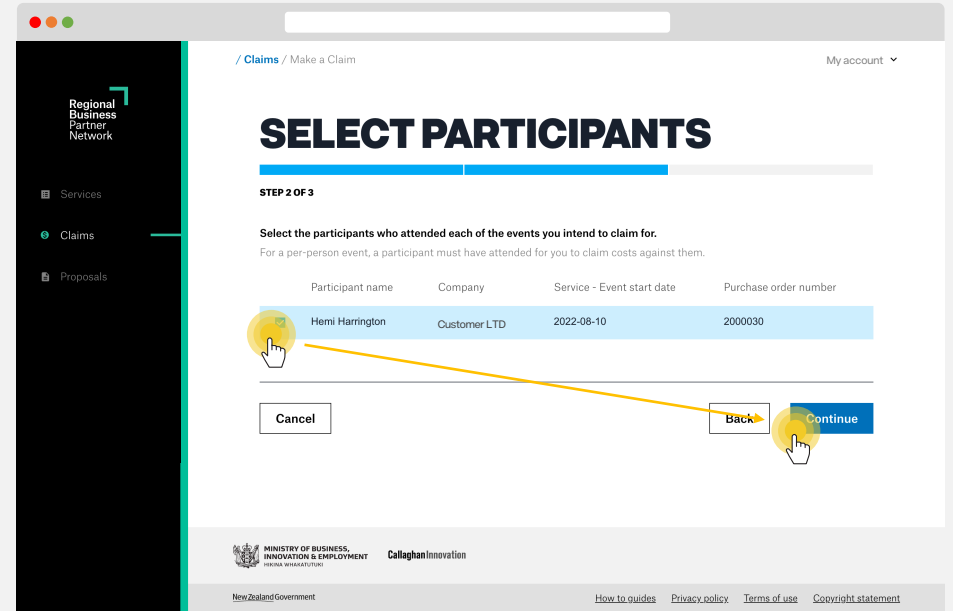
Step 2

Select the booking you intend to claim against by ticking the box and clicking on **Continue**.



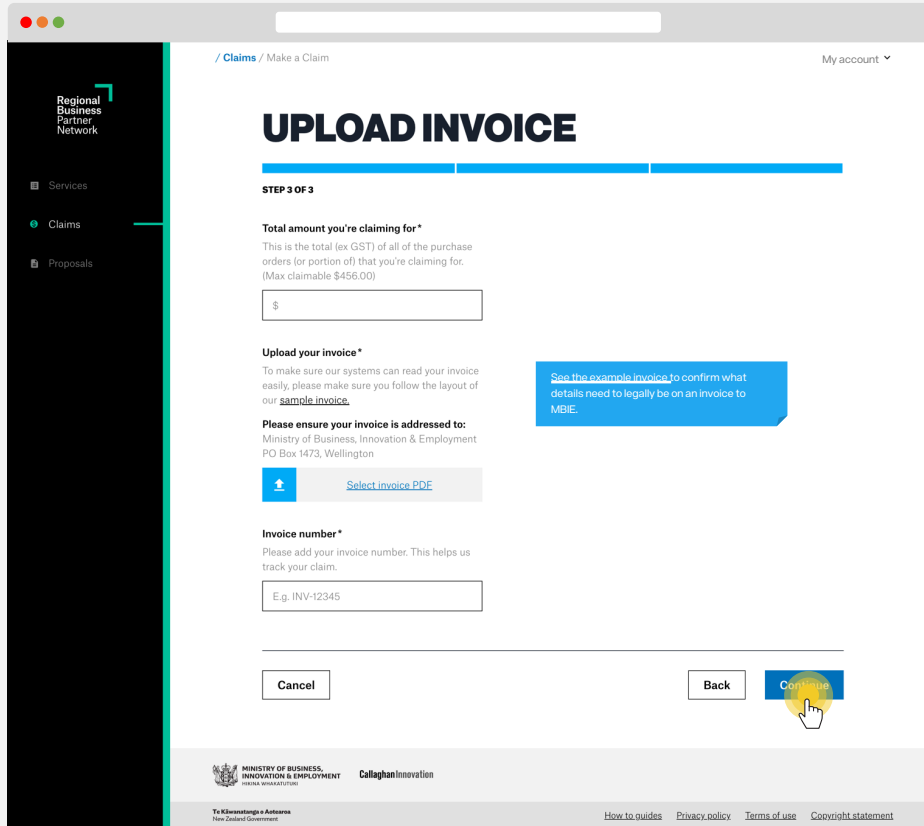
Step 3

Select the participants that attended the event you are claiming for by ticking the box and clicking on **Continue**.



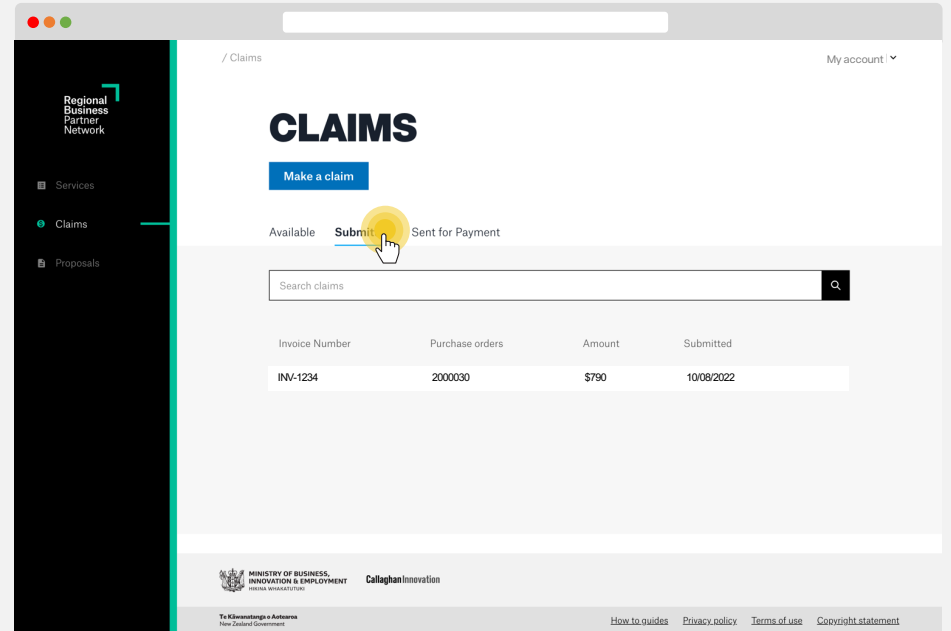
Step 4

Complete the **claim details** and **upload an invoice**. Then click **Continue**



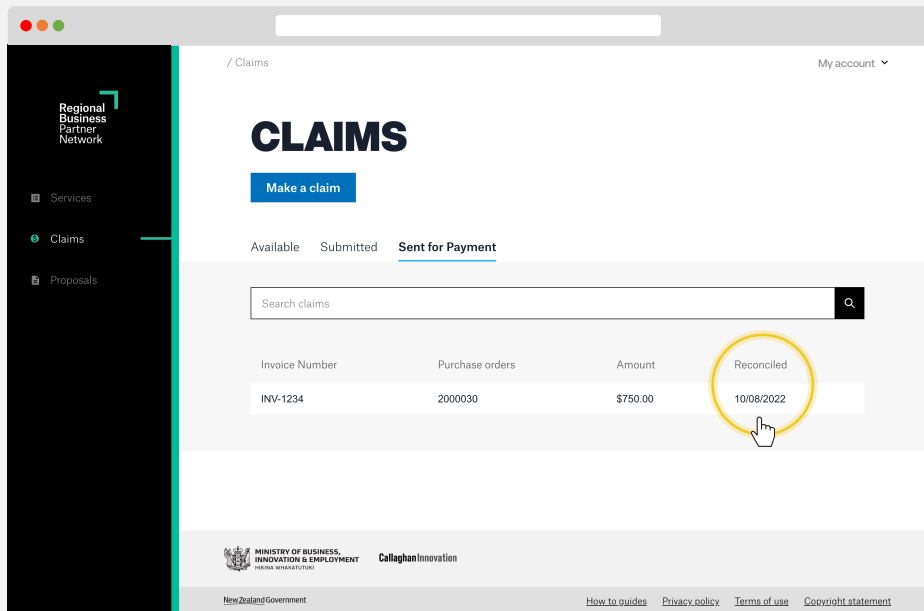
Step 5

To view your claim, click on the **Submitted** tab.



Step 6

The **Reconciled date** is the date the invoice was checked by the RBPN team and has been sent to our Accounts Payable team to be paid.



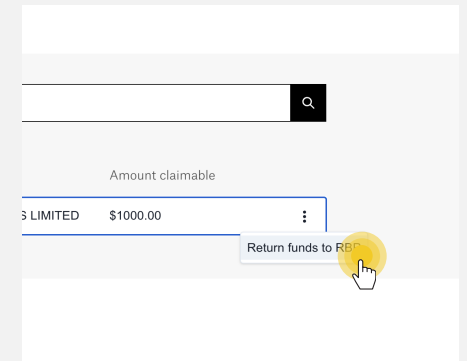
Returning funds to the RBP

If your booking has not been completed or there is a balance on the Purchase Order that you don't intend to claim for, you can **Return the funds to RBP.**

This will return the remaining balance back to the RBP for the customer to use on another booking. No more claims will be possible against this purchase order once this option has been actioned.

Follow these steps to **Return funds** to the RBP:

- Select the booking from the **Available** tab.
- On the right hand side there are **three dots (:)**, click on these and select **Return Funds to RBP.**
- Click **Ok** in the pop-up message asking for confirmation you wish to return the funds.



# Add a team member

## Frequently asked questions

### How many team members can I add?

You can add as many team members as you need. We encourage you to regularly check who is active to ensure that members who have left your organisation no longer have access.

### What's a primary account holder?

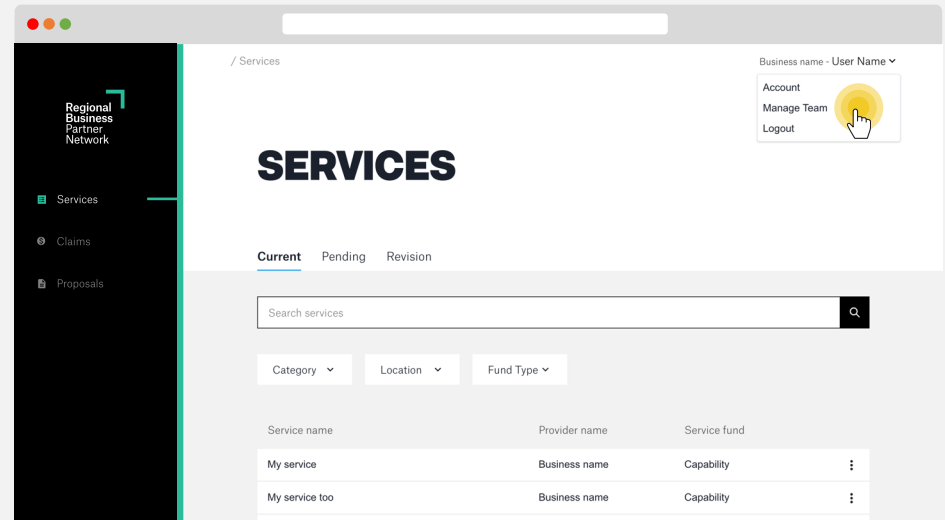
The primary account holder is the account owner for your organisation. This is the person who we'll contact if we need to query anything with your account.

### Can I stop receiving emails?

Yes you can. **Access your account** through the dropdown menu in the top right of your window. **Select Edit Profile** from the **Actions** menu. In here you'll find an option to turn off **Receive Email Notifications**.

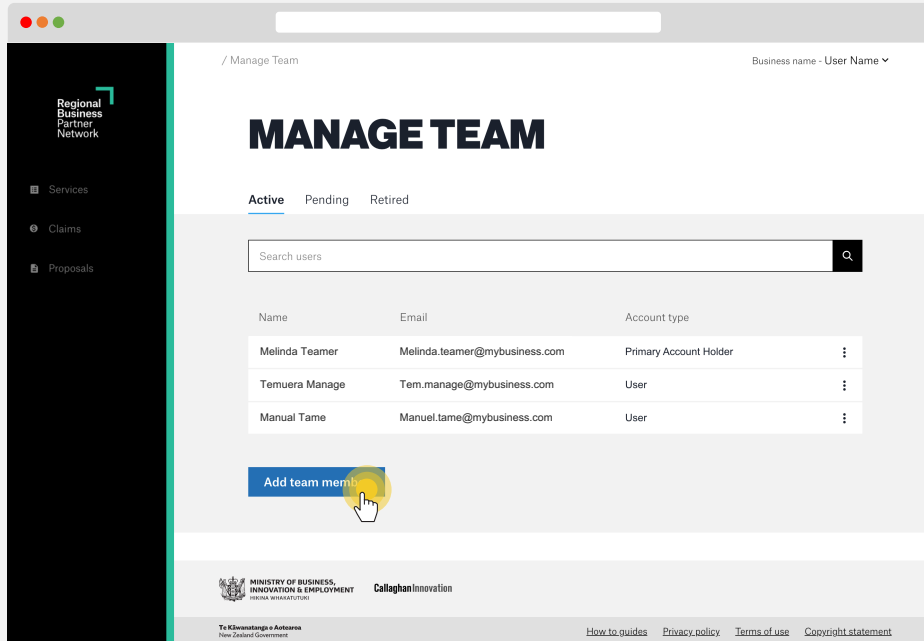
## Step 1

Select **Your Name** in the top menu. Click on **Manage Team**.



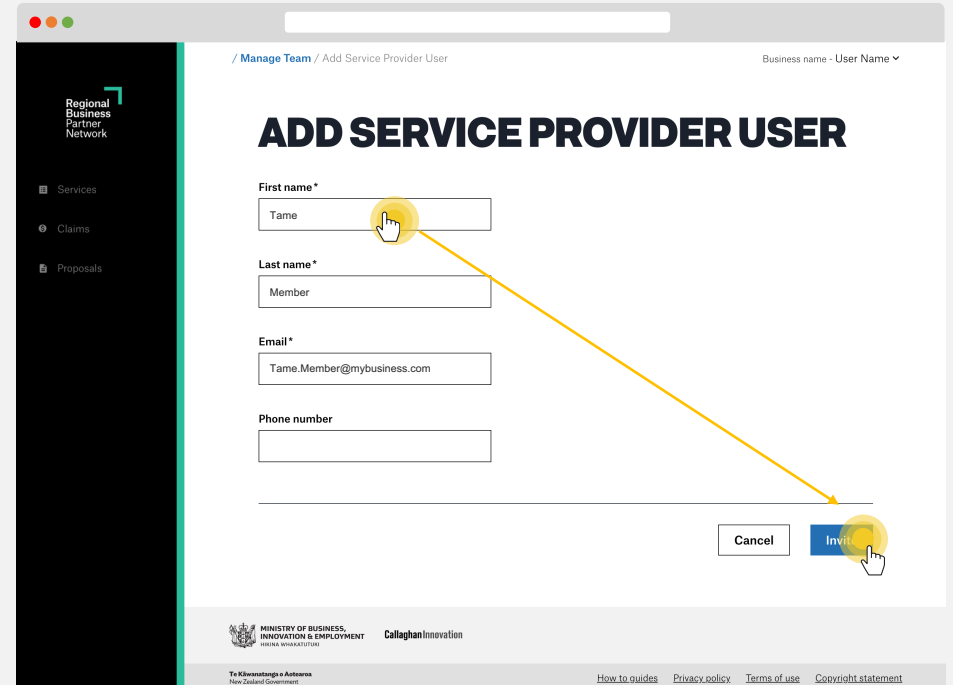
Step 2

Click Add Team Member button.



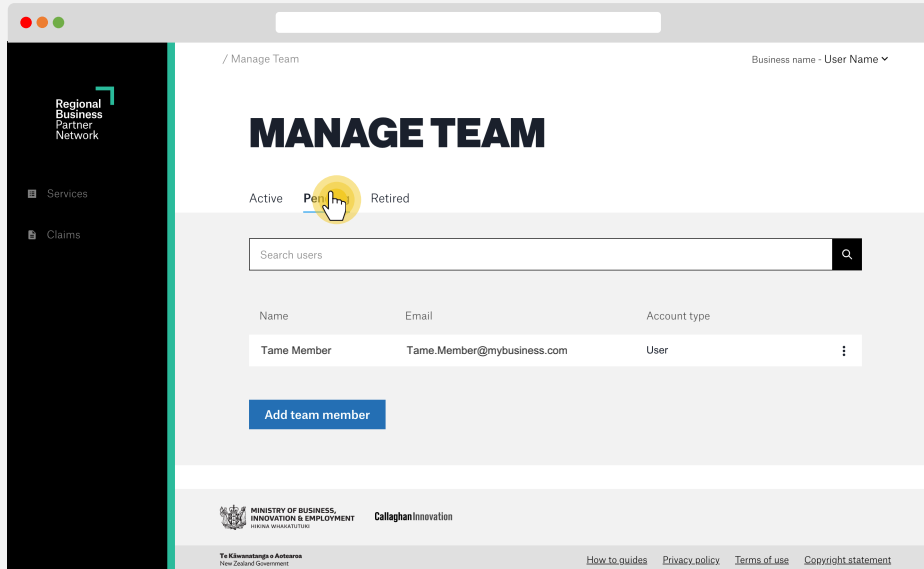
Step 3

Enter your team member's details and click Invite.



Step 4

Your invited team member will now show as **Pending**.



Step 5

They will be **sent an email inviting them to complete their account signup**. This includes confirming that they agree to the terms and conditions of the Regional Business Partner Network. Once they've agreed to the terms and conditions, the team member will show as Active.

