Regional Business Partner Network

Service Provider

How-to guides

Contents

October 2023

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

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 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

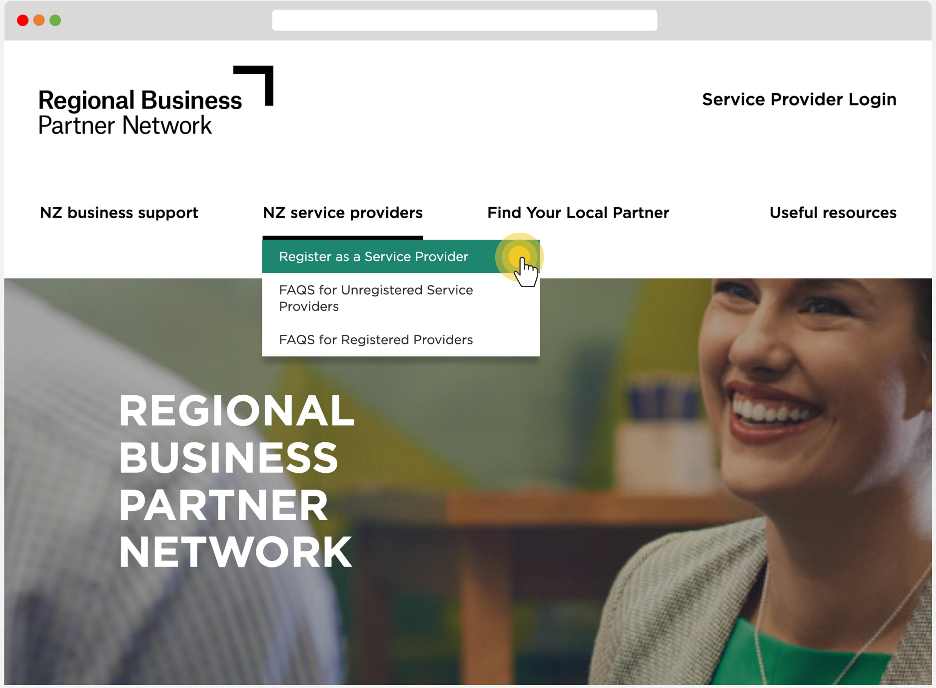
A minimum **$1 million** is a mandatory Government requirement.

Step 1

Visit regionalbusinesspartners.co.nz.

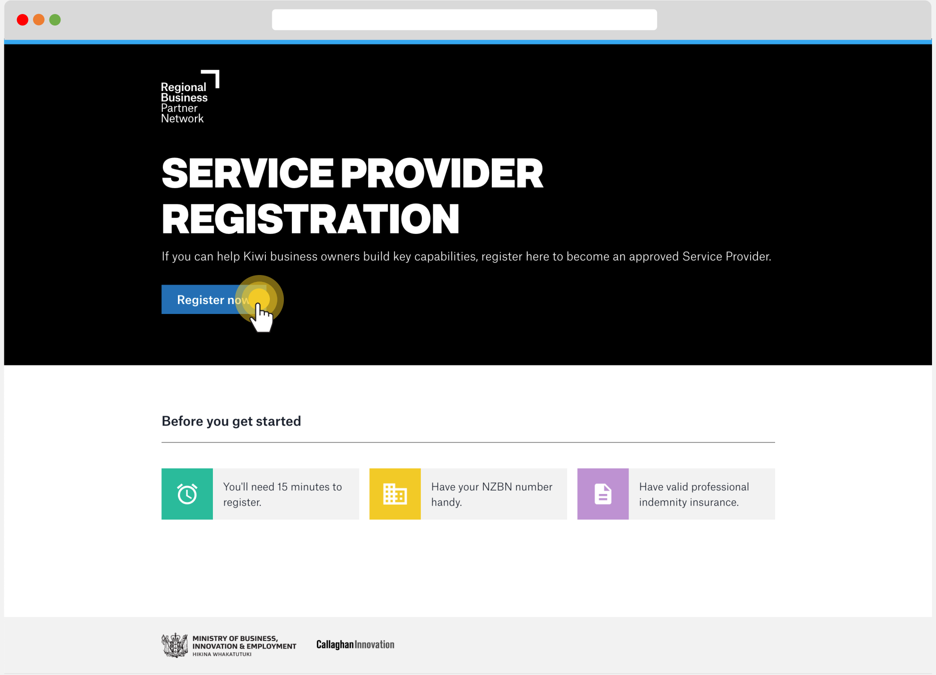
Hover mouse over **NZ service providers** for the drop-down menu to reveal.

Click **Register as a Service Provider.**



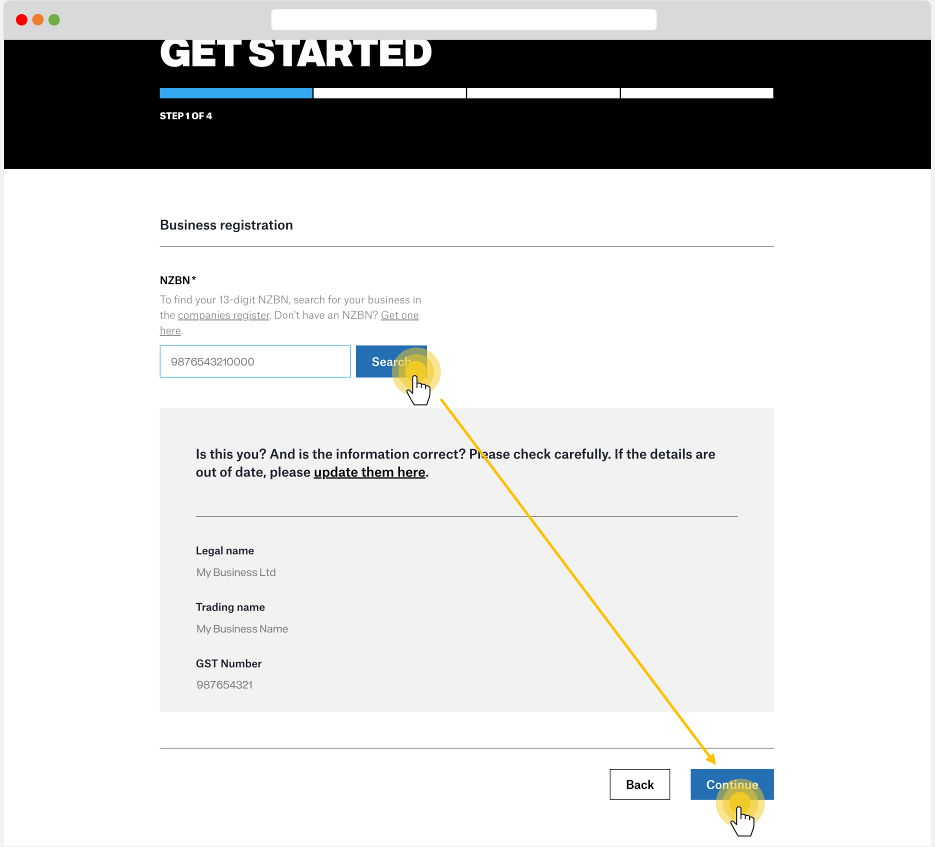
Step 2

Click Register now.



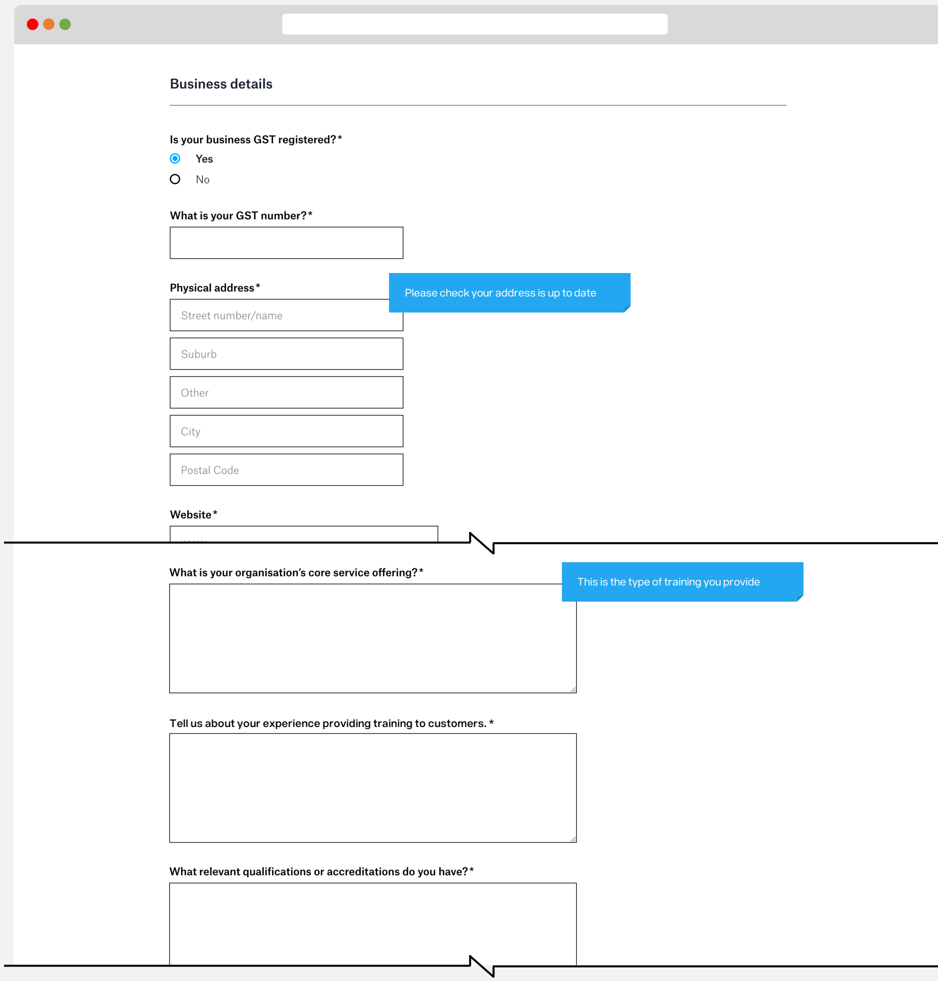
Step 3

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



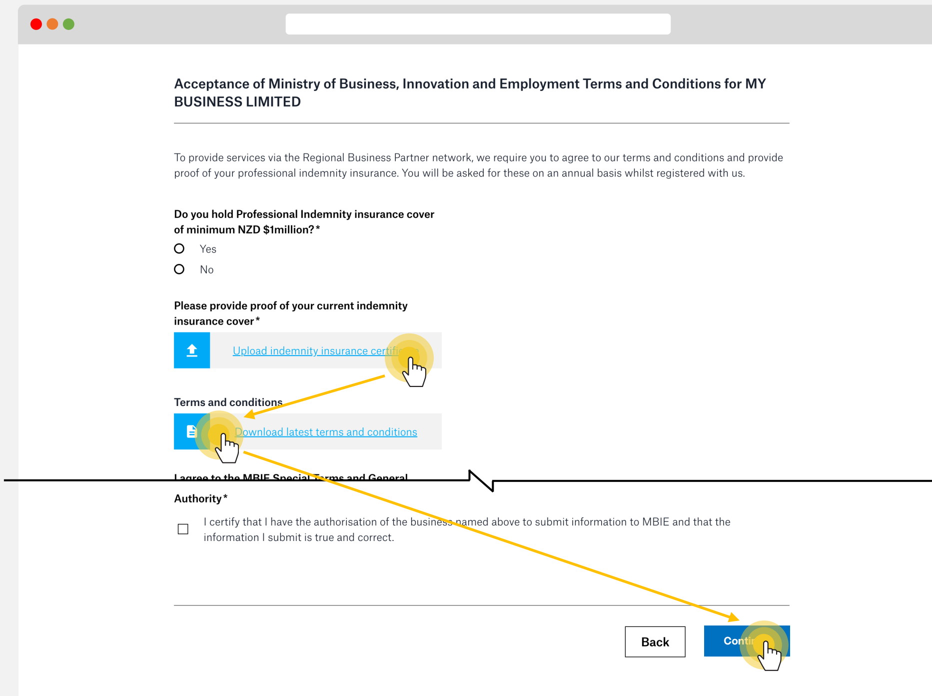
Step 4

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



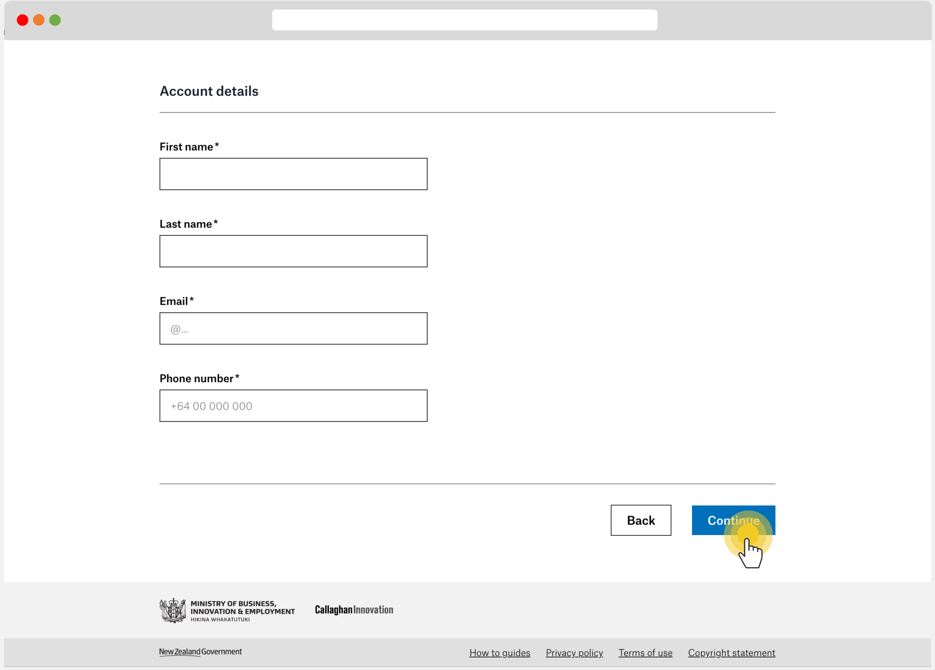
Step 5

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.**



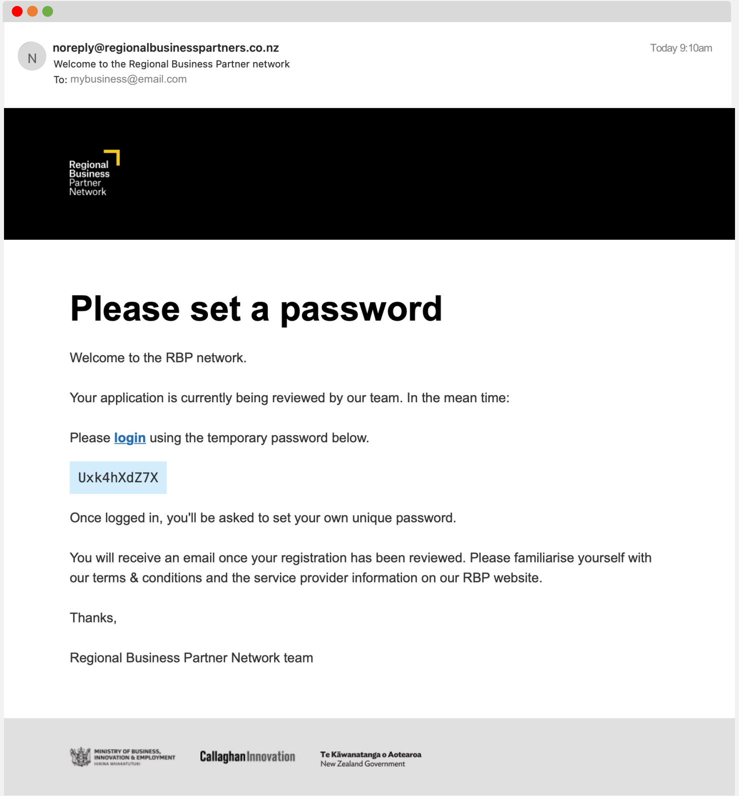
Step 6

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.**



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

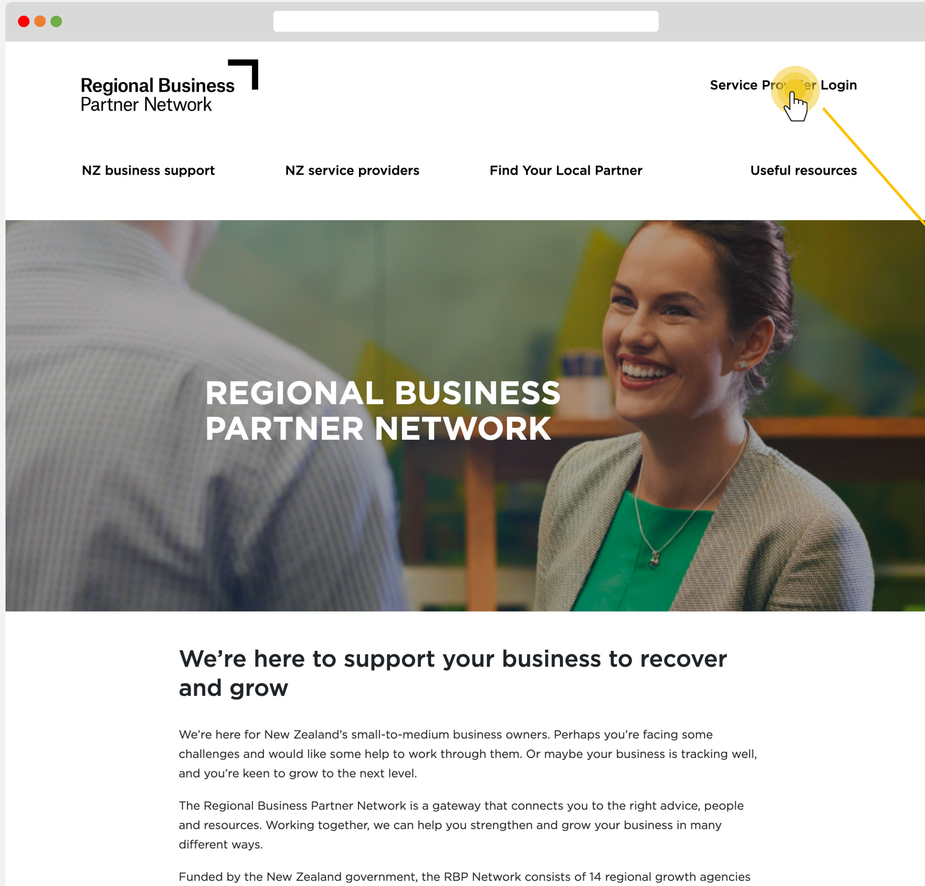
Click the **Service Provider Login** button.

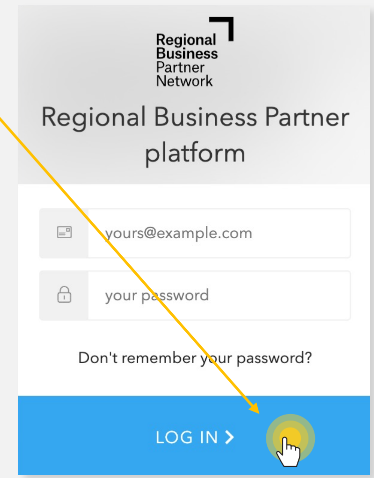
Enter your credentials into the login screen

Click **Log in**

Pro tip

Bookmark this address to go straight there:
web.regionalbusinesspartners.co.nz

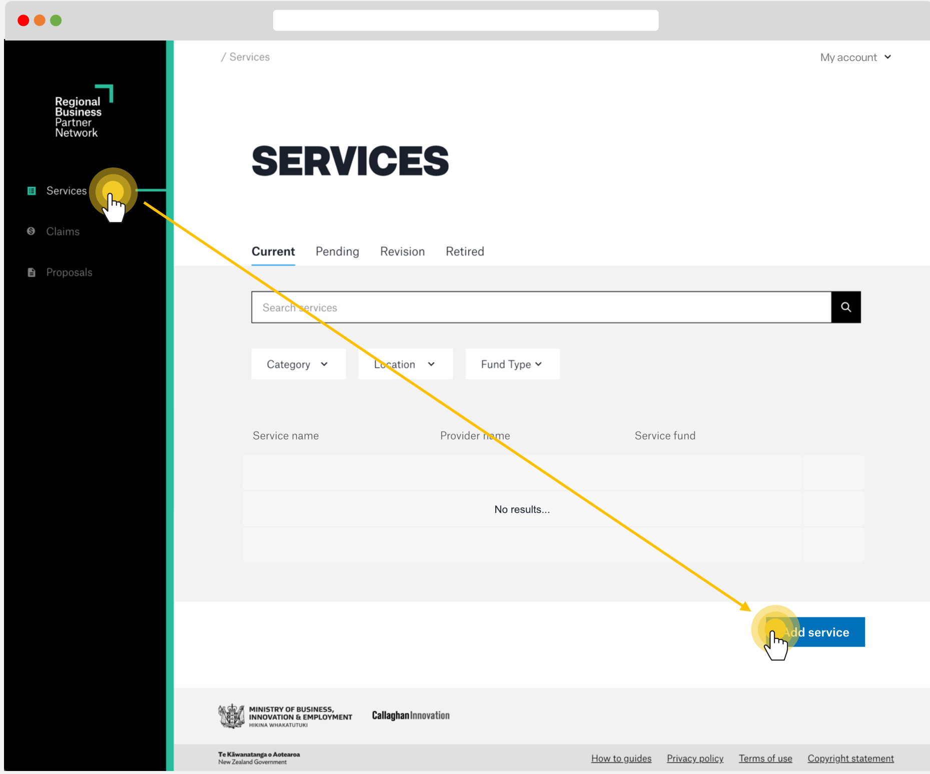




Create a Training Service

Step 1

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



Before you start

Does your service meet the criteria?

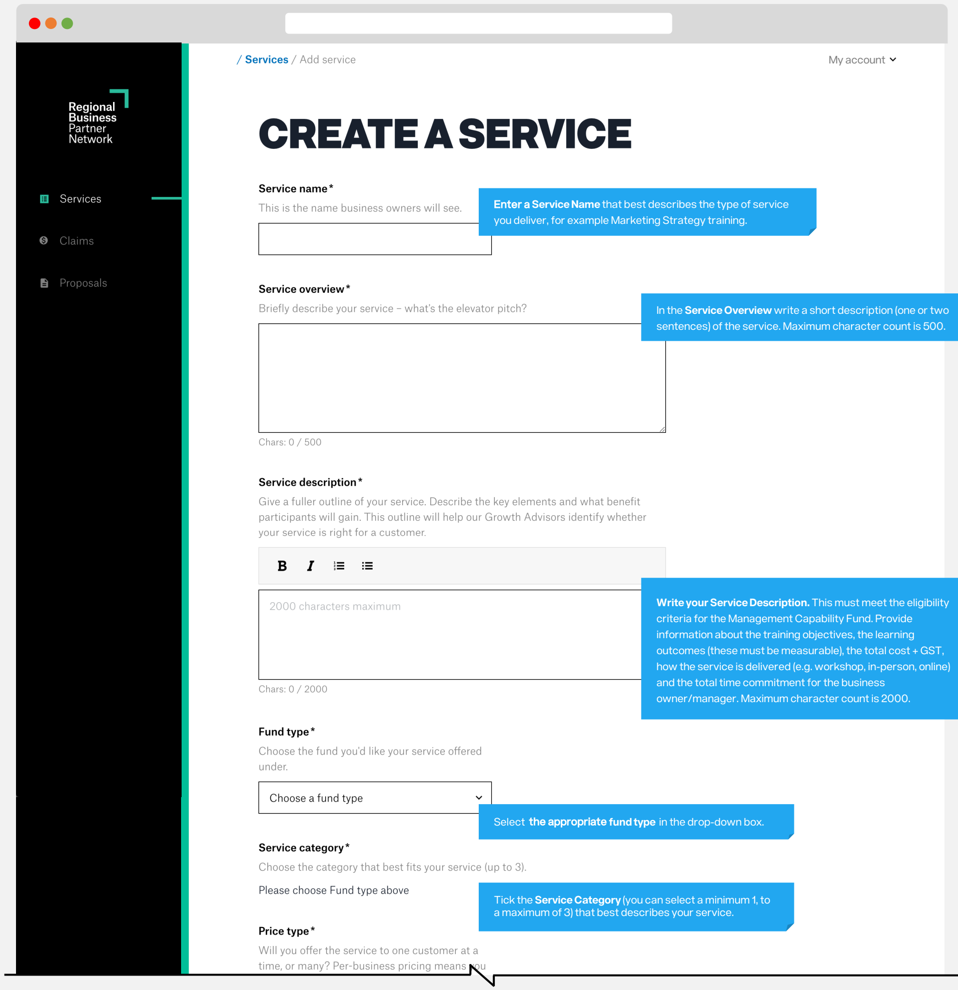
Your training service must meet the eligibility criteria for the RBPN Management Capability Fund – find out more here: Eligible service subjects.

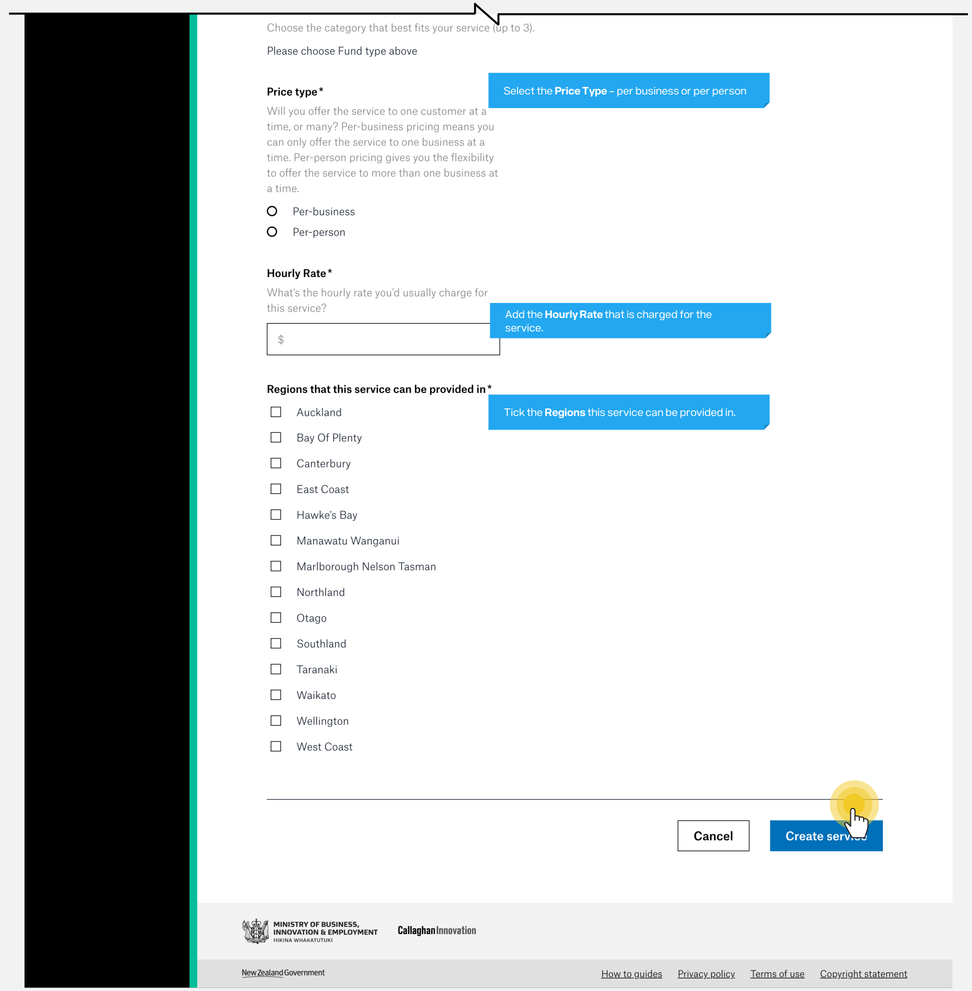
Categorize your service carefully.

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

Step 2

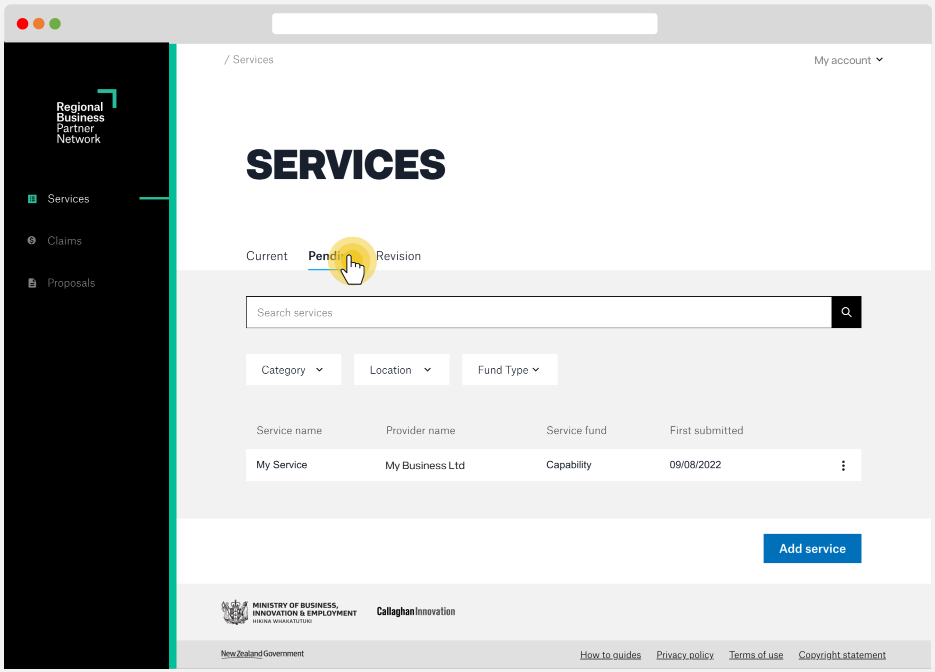
Complete the details in **Create a Service.**





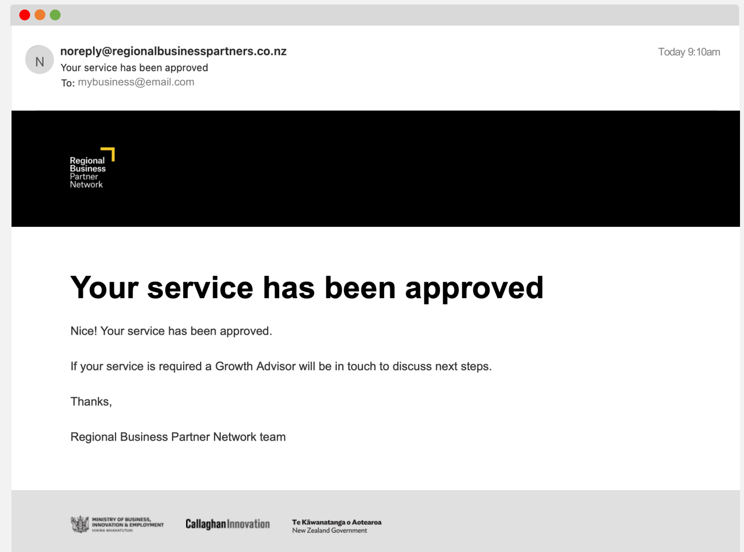
Step 3

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

Advisor requests proposal for a service

↓

You complete the proposal

↓

You share proposal with customer

↓

Customer accepts proposal

↓

Proposal is sent to advisor for approval

↓

Advisor approves proposal

↓

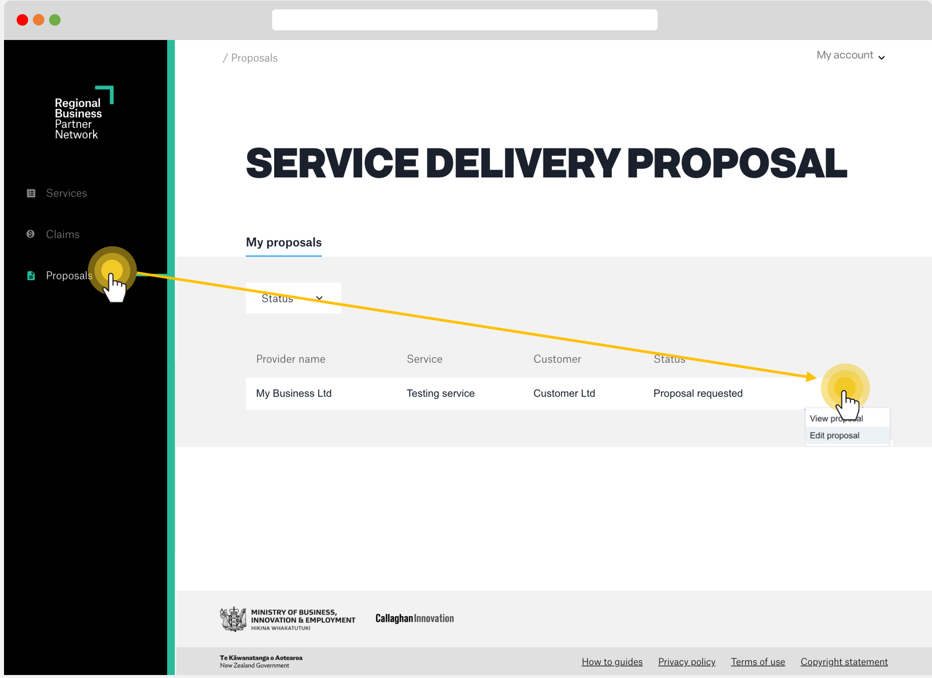
You create Event listing

↓

Advisor books customer on Event

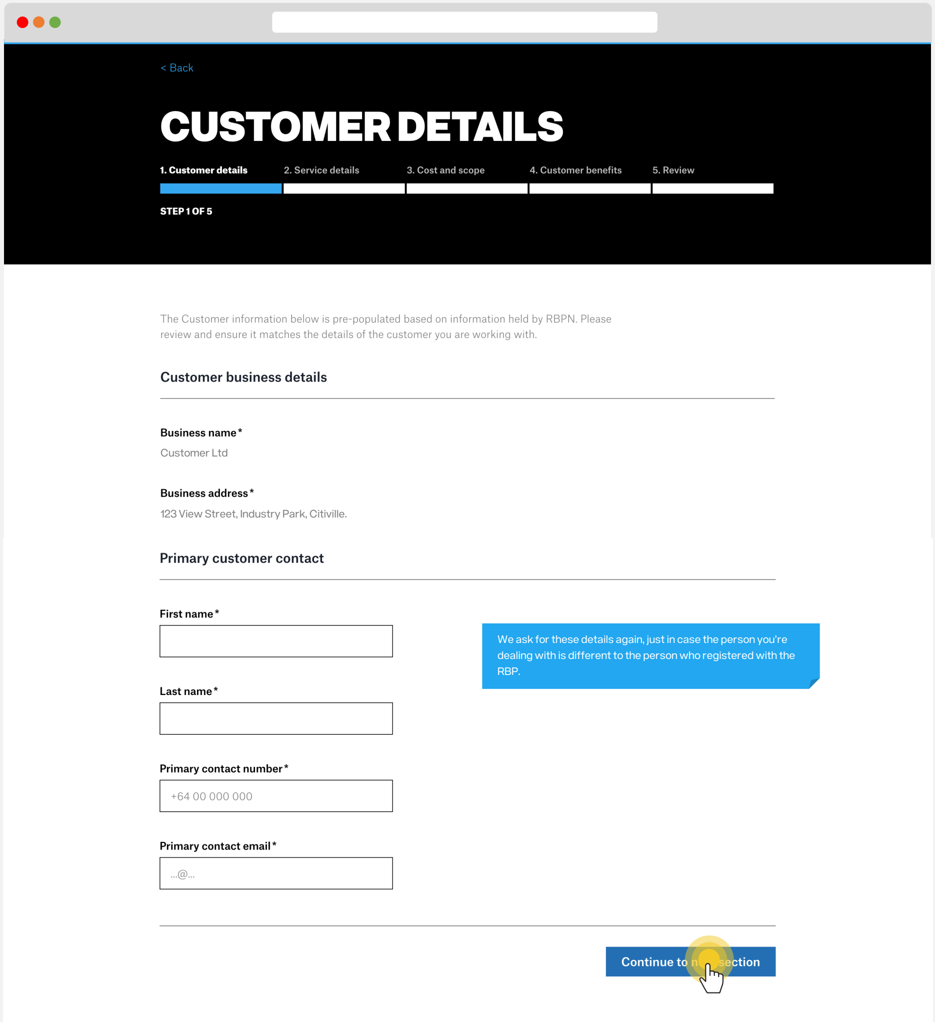
Step 1

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



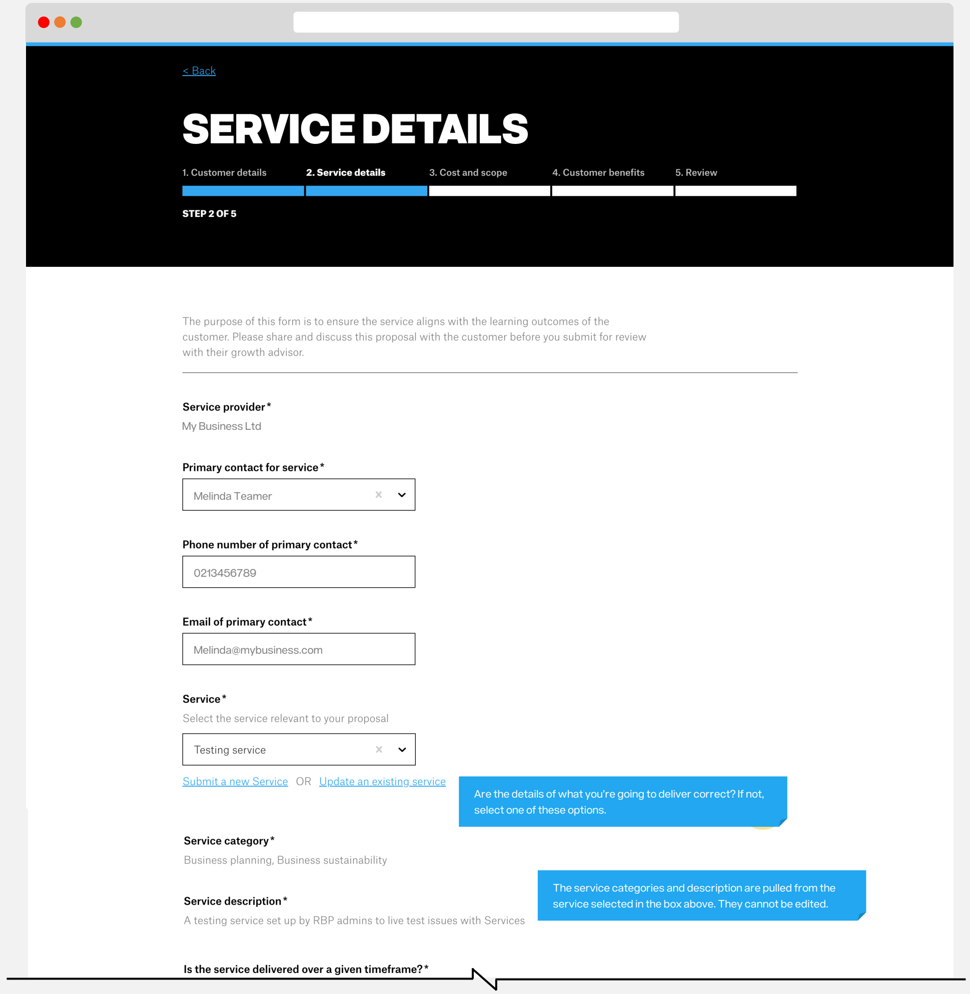
Step 2

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



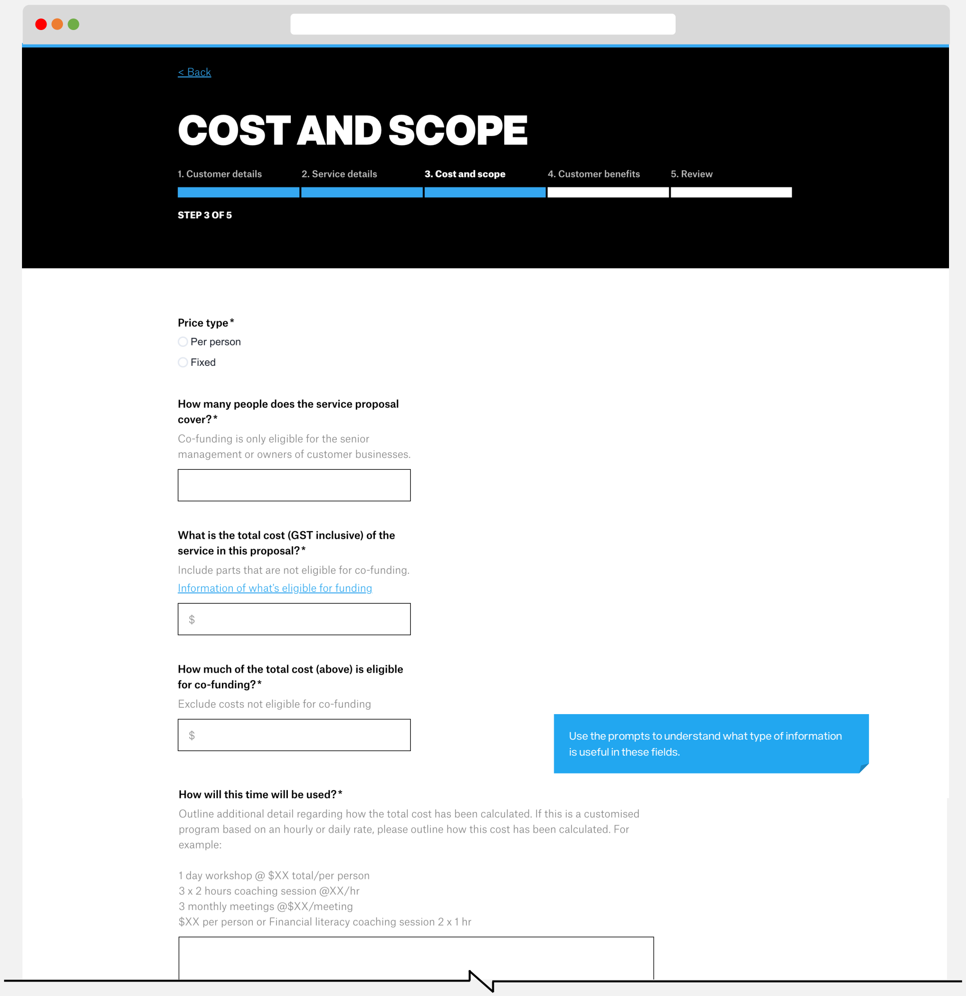
Step 3

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



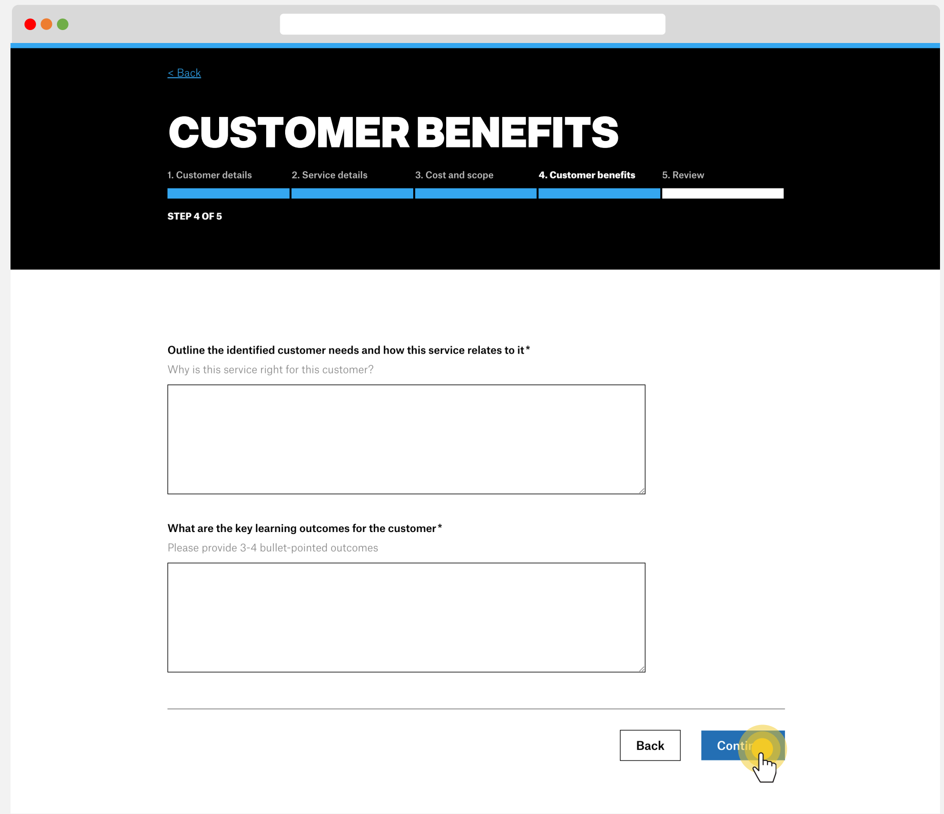
Step 4

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



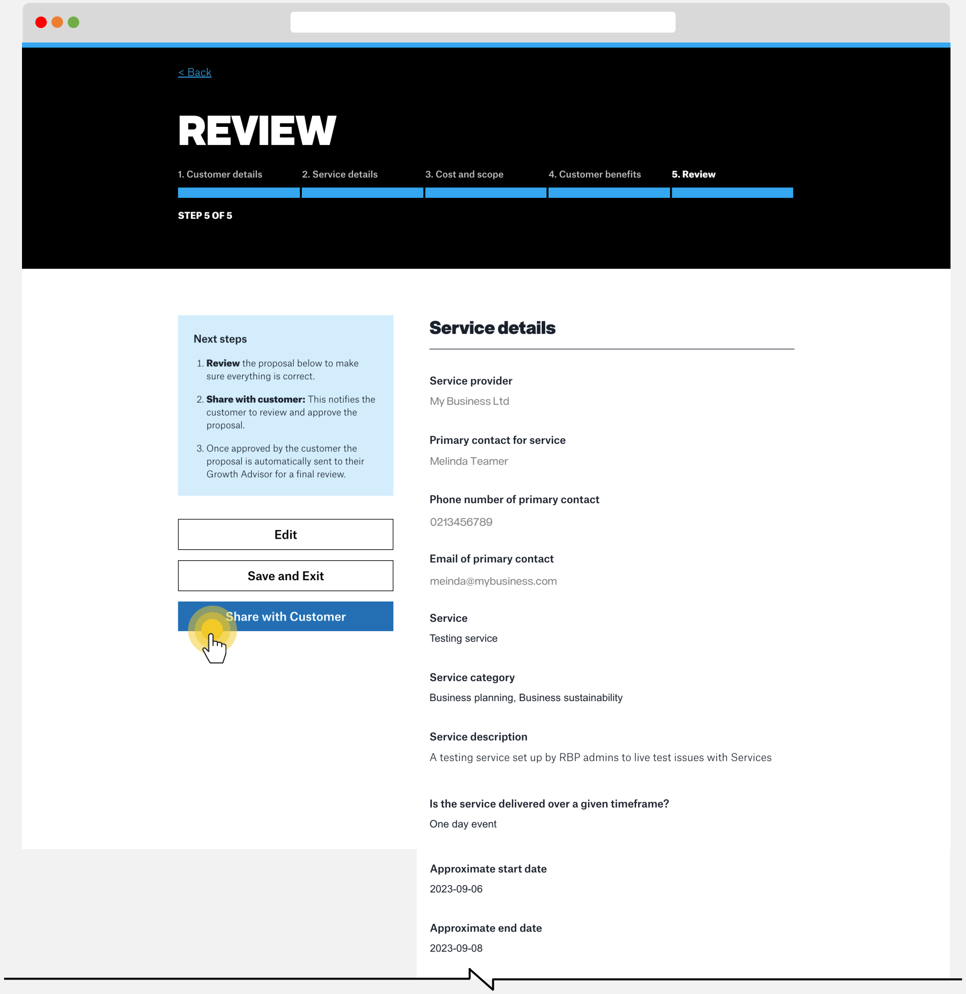
Step 5

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



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?

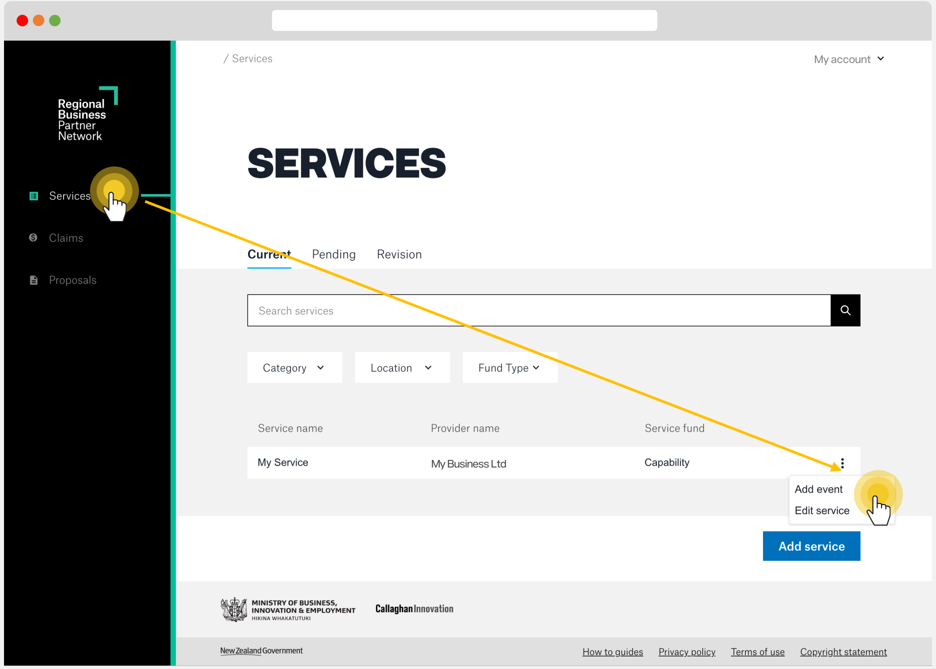
Events are a one-off delivery of a registered service. A Growth Advisor will request you create an event after a customer has chosen your service and is allocated funding. The Growth Advisor will provide details of who the customer is and how much they are funded for.

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.

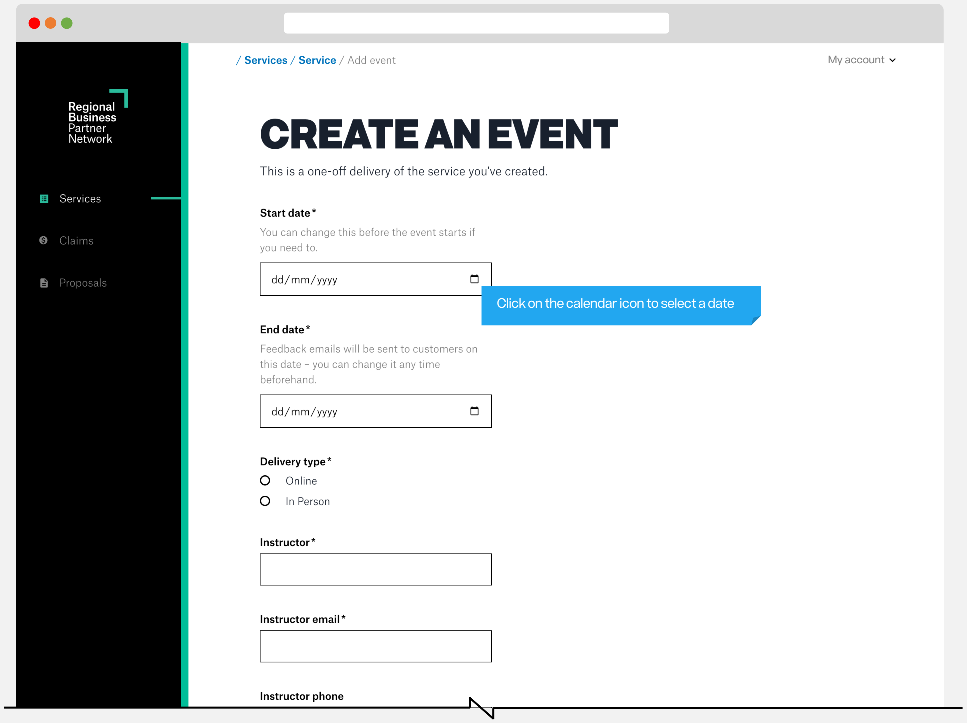
Step 1

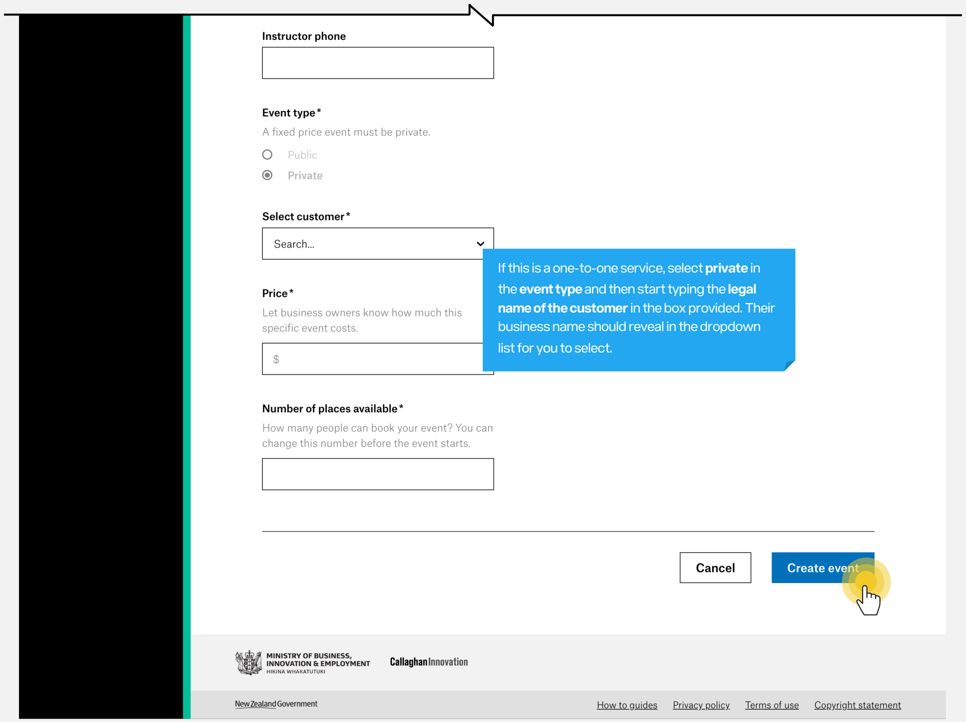
Select **Services** in the navigation menu and select one of your registered services. Click on the **three dots (⋮)**, and then click **Add Event.**



Step 2

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

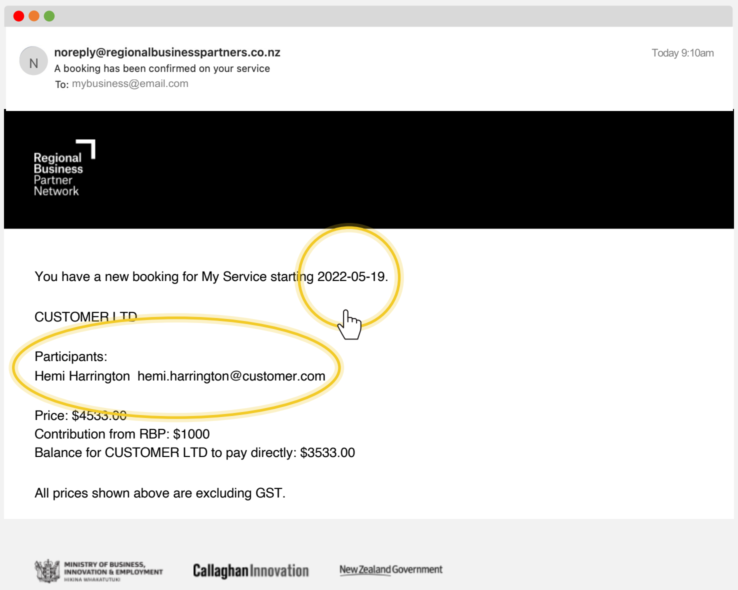




Step 3

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.



noreply@regionalbusinesspartners.co.nz
A booking has been confirmed on your service
To: mybusiness@email.com
Today 9:10am

Regional Business Partner Network

You have a new booking for My Service starting 2022-05-19.

CUSTOMER LTD

Participants:
Hemi Harrington hemi.harrington@customer.com

Price: $4533.00
Contribution from RBP: $1000
Balance for CUSTOMER LTD to pay directly: $3533.00

All prices shown above are excluding GST.

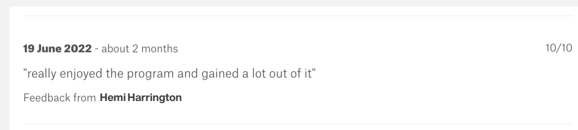
Ministry of Business, Innovation & Employment Callaghan Innovation New Zealand Government

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.



19 June 2022 - about 2 months 10/10
"really enjoyed the program and gained a lot out of it"
Feedback from **Hemi Harrington**

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?

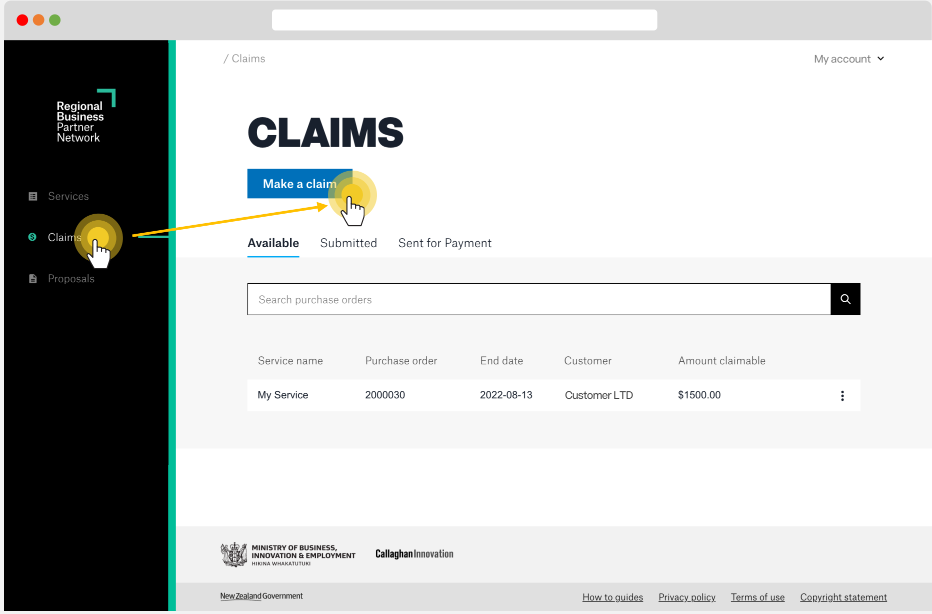
The customer **must be invoiced** for their contribution **before claiming** for Management Capability Fund training services.

When can I make the final claim?

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

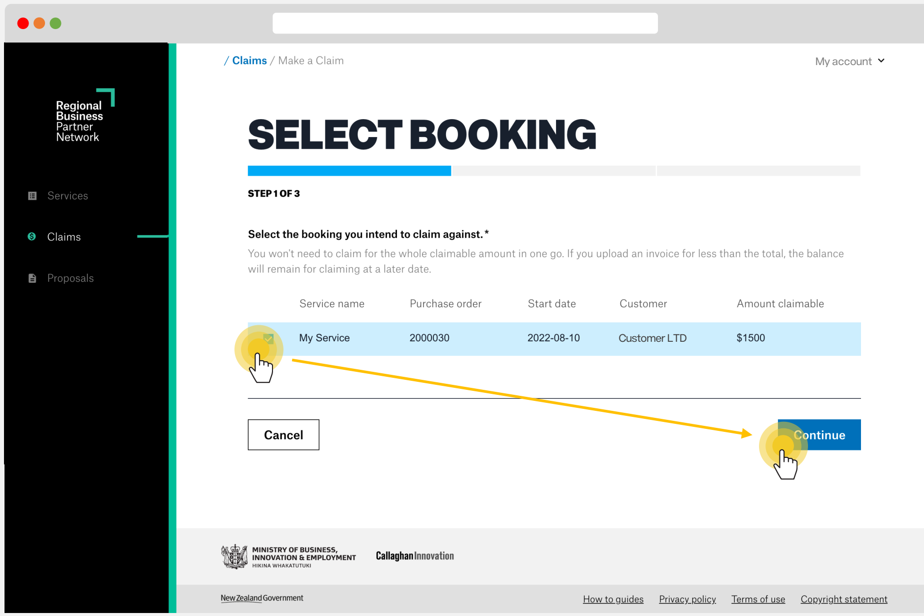
Step 1

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



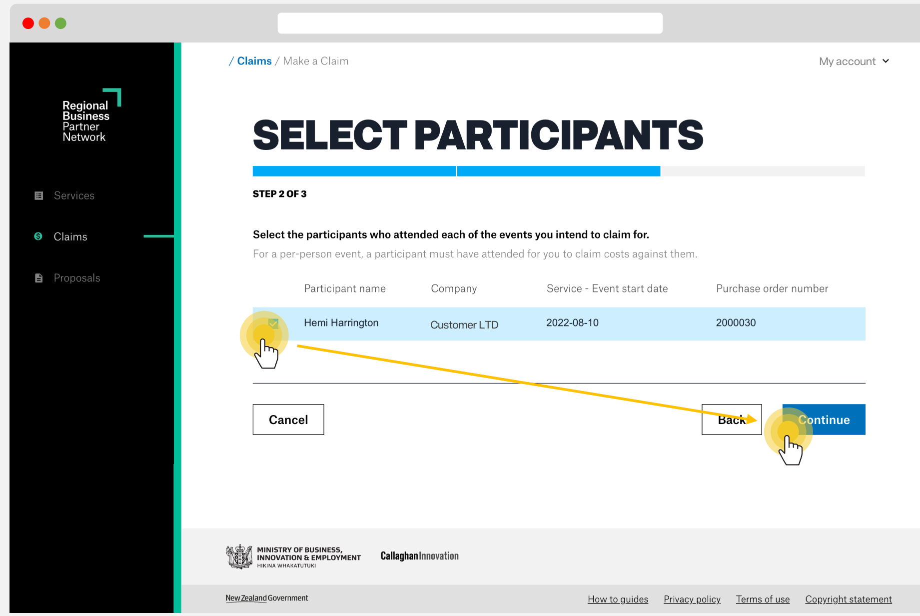
Step 2

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



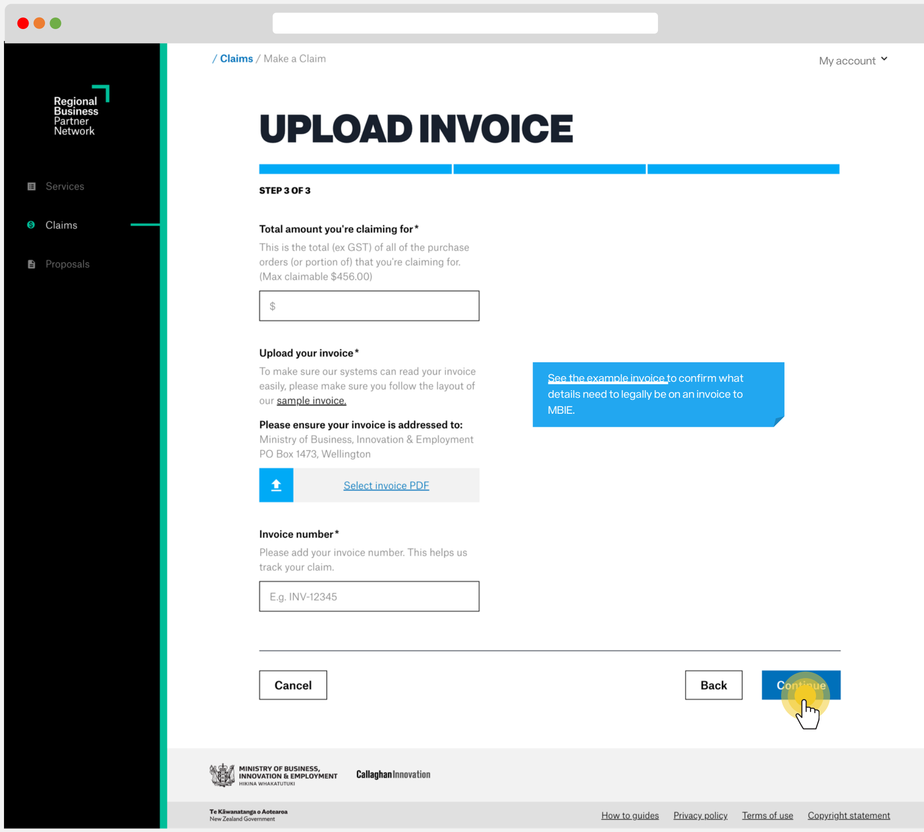
Step 3

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



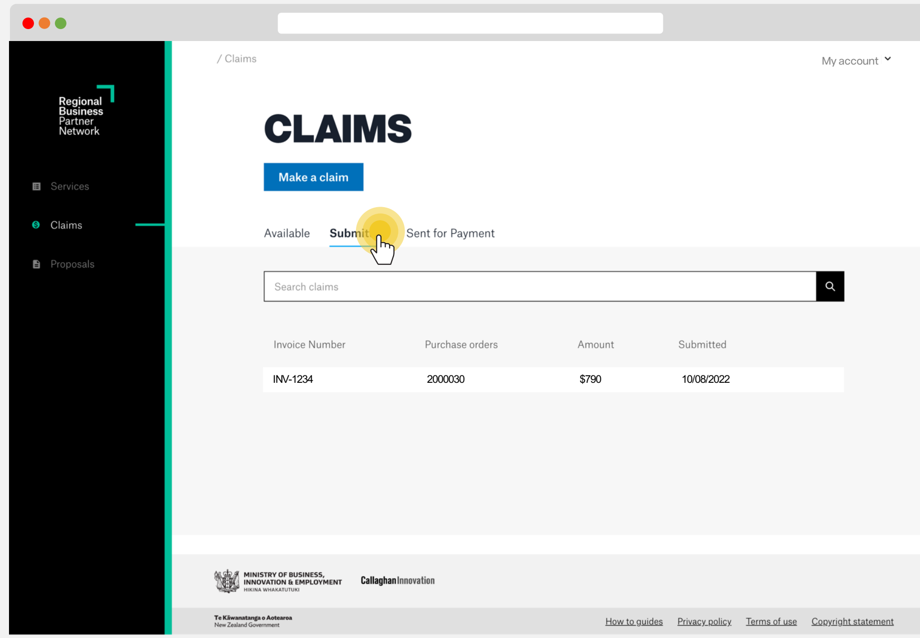
Step 4

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



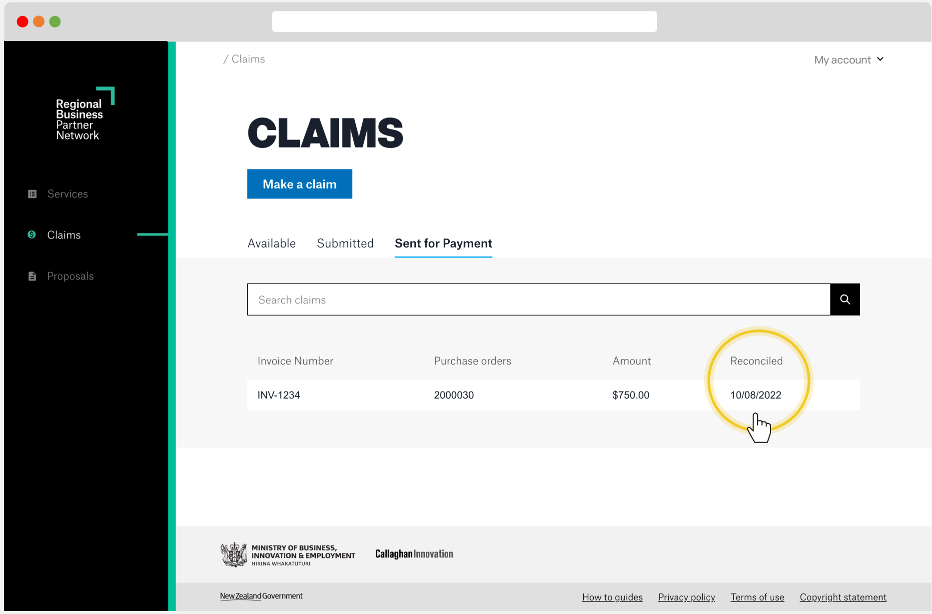
Step 5

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.



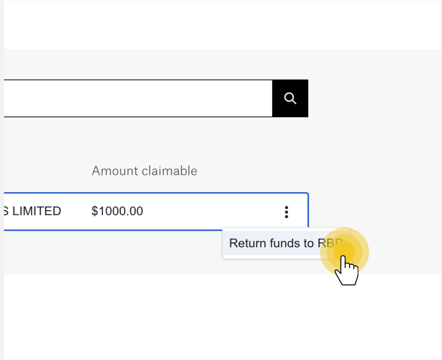
Returning funds to the RBP

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?

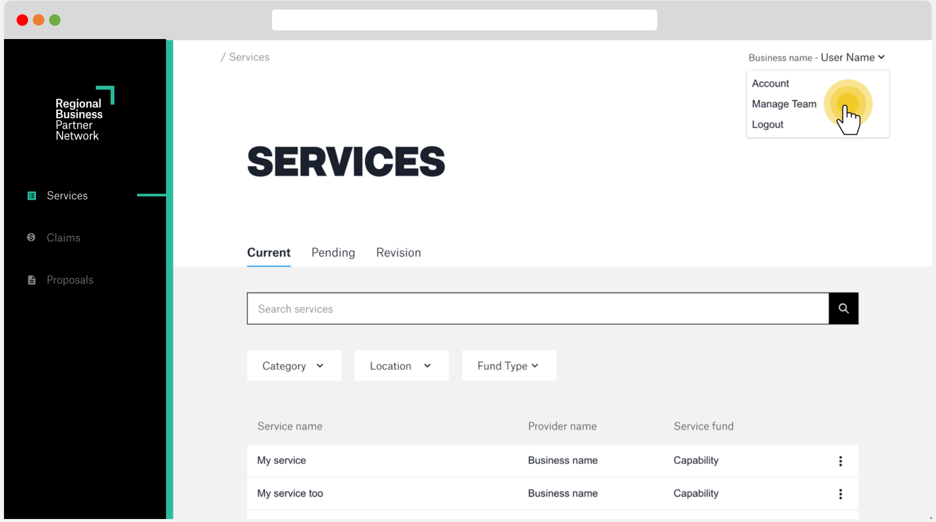
The primary account holder is the account owner for your organisation. This is the person who we'll contact if we need to query anything with your account.

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.**

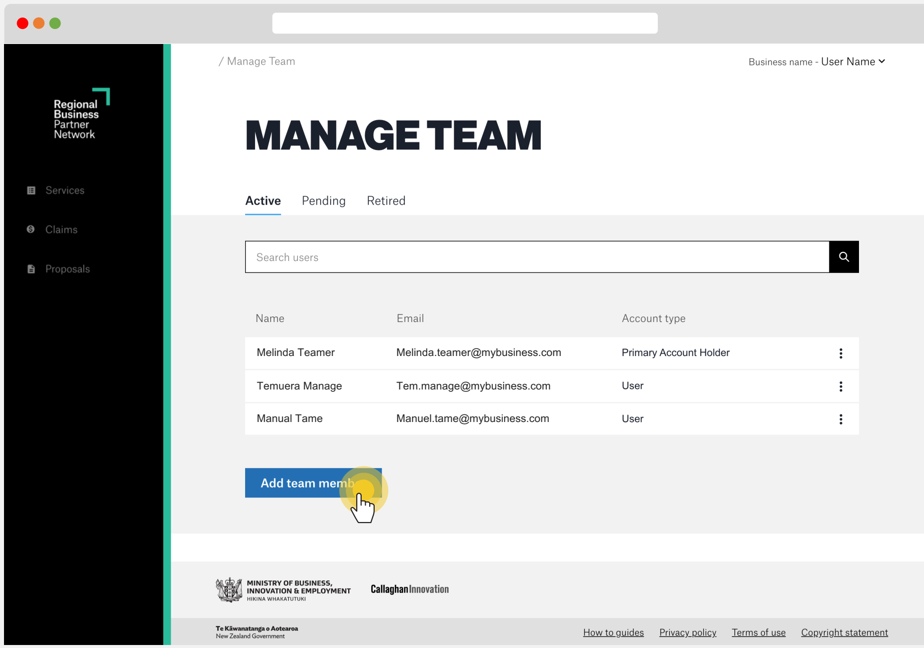
Step 1

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



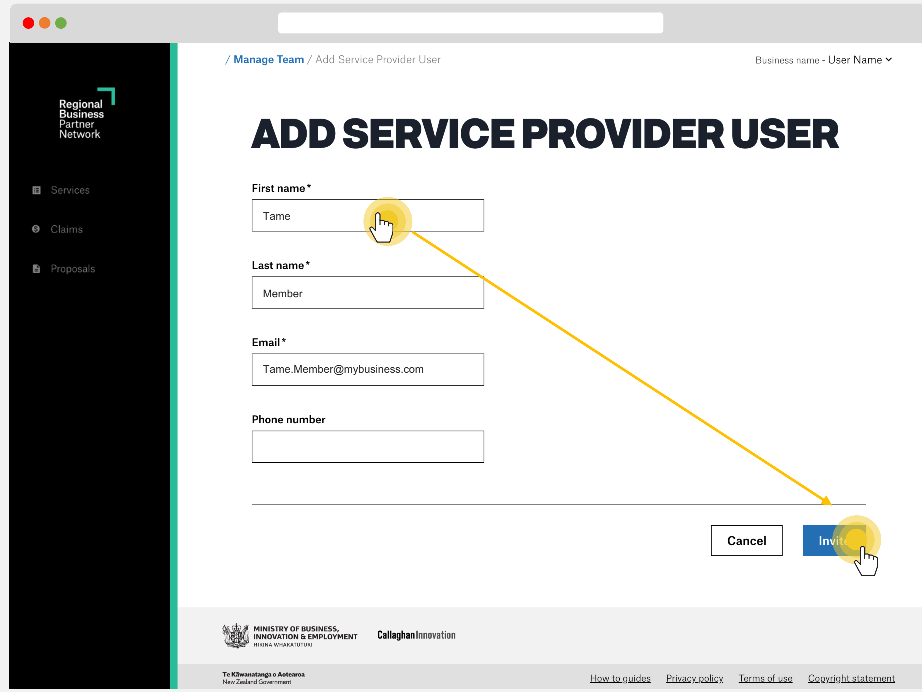
Step 2

Click Add Team Member button.



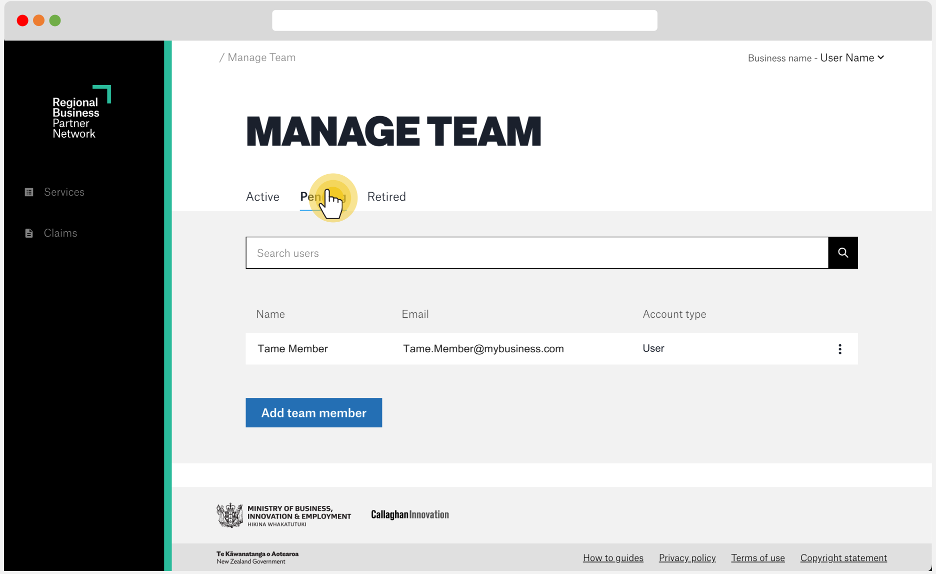
Step 3

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.