



HOW TO GUIDES

SERVICE PROVIDER

How to update your migrated services

Step 1
When you login as a provider for the first time you will land on the **migrated** tab.

Step 2
Click on the **service name** to open

Step 3
Click **actions** dropdown and select **edit service**

- Step 4**
1. Add a **service overview** description *(keep it concise like an elevator pitch. 500-character limit)*
 2. Review **current service** description *(remove price from description. 2000-character limit)*
 3. Add **price type** and **hourly rate** excl. GST *(for Capability fund services your full training service price will be captured when setting up an event)*

Check details in below fields

1. Review **category/s** and **region/s**

Service name and **fund type** cannot be edited *(to change these details, you will need to retire this service and setup a new service)*

Step 5
Click **edit service** button *(all updated services moves to the revision tab for the RBP team to review.)*

1 SERVICES

Current Pending Revision Retired **Migrated**

Search services

Service name	Locations	Hourly Rate	Number of events	Service fund	Actions
Playing to win strategy workshop	Auckland + 2 more	\$200	1	Capability	<ul style="list-style-type: none"> Add event Edit Service Retire Service

2 PLAYING TO WIN STRATEGY WORKSHOP

Service details

3 EDIT SERVICE

4 EDIT SERVICE

Service name: Playing to win strategy workshop

Service overview: Briefly describe your service - what's the elevator pitch? (500 characters maximum)

Service description: Strategic planning is often viewed as a bit of a black-art or bolt-on activity and not a month-on-month business process. In reality, strategic planning is actually very simple. Once you understand it is a step-by-step business process then all you have to do is learn the steps. It is at this point a break-through action is required. Bringing in a skilled strategy consultant to act as a teacher and facilitator to kick-start the activity with a rock-solid process and a structured workshop can make a real difference. The Business Co. three-session workshop covers a seven-step process based on the principles of the balanced scorecard methodology. By the end of the process, you will create a strategy scorecard. Price \$1000. Hourly rate: \$200. 3 Part workshop held with our instructor Kimberly.

Fund type: Choose the fund you'd like your service offered under. (Options: Capability, Covid, Tourism)

Service category: Business planning (checked), Business sustainability, Business systems, Capital raising, Export, Finance, Governance, Lean manufacturing / Business operations, Managing resources, Marketing strategies, Leadership.

Price type: Per Person (checked), Fixed

Hourly Rate: \$

Regions that this service can be provided in: Auckland (checked), Bay Of Plenty (checked), Canterbury, East Coast (checked), Hawke's Bay, Manawatu Wanganui, Marlborough Nelson Tasman, Northland, Otago, Southland, Taranaki, Waikato, Wellington, West Coast.

5 Edit service

IMPORTANT: If a password reset is requested, you'll have **12 hours** before that link expires.

An **email address** will replace usernames. Only **ONE** account login will be available at this stage.

How to register as a service provider

Go to regionalbusinesspartners.co.nz
 Click [New Zealand service providers](#)
 Click [Apply to become a service provider](#)

Step 1
 Click [Register now](#)

Step 2
 Enter your NZBN number, confirm details are correct **OR**
 If you need an NZBN number go here nzbn.govt.nz

Step 3

1. Download and fill in the **service contract PDF**
2. Upload the completed document, refer to **important** information top right.

PDF must be saved to your desktop first before filling in. If this is not done, the PDF won't save and will be blank.

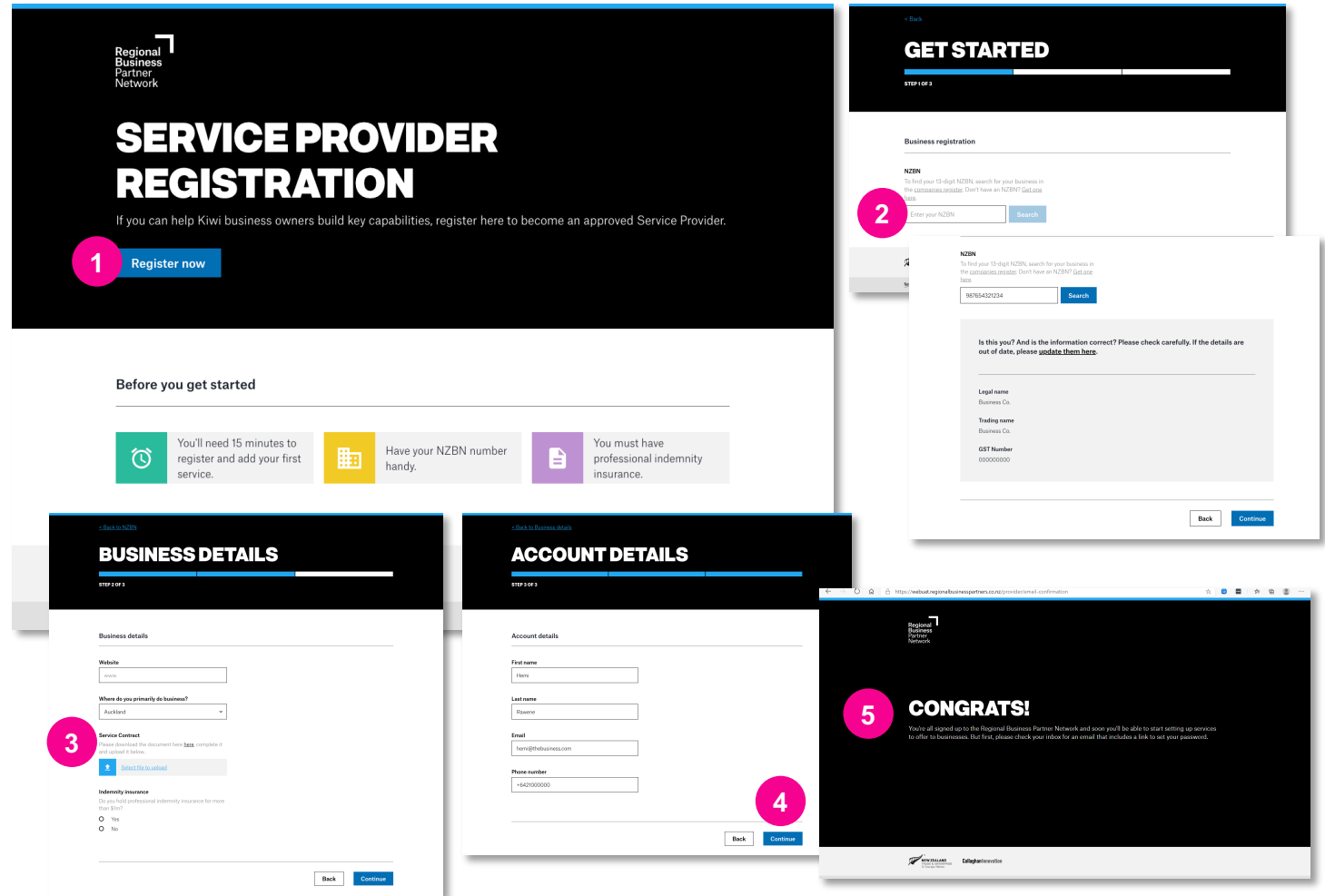
Step 4
 Complete **account** details, continue

Step 5
 Congrats! You're registered

IMPORTANT: Need an NZBN number? Go to nzbn.govt.nz

Applicants must complete, sign and date their **service contract**, then upload the contract with T&Cs for RBP to review.

Indemnity insurance is a mandatory Government requirement.



How to create a service

Step 1

Go to your Services dashboard, click **add service** button

Step 2

1. Enter **Service Name**
2. Write your **service overview** *(keep it concise 500-character limit)*
3. Check **service description** *(must meet the **eligibility criteria** for the relevant fund - 2000-character limit)*

Step 3

1. Select **fund type** *(to register advisory services under COVID & Tourism you will need to set up two separate services)*
2. Select **category/s**
3. Add **price type**
4. Add **hourly rate**
5. Add **location** details

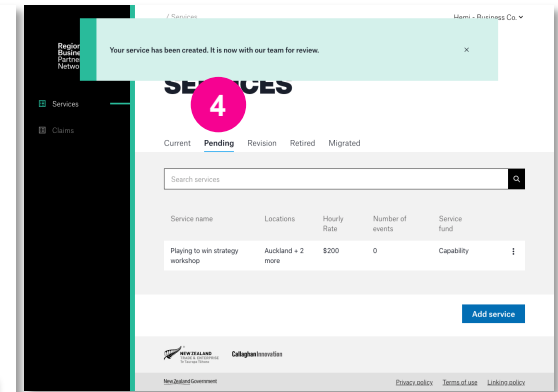
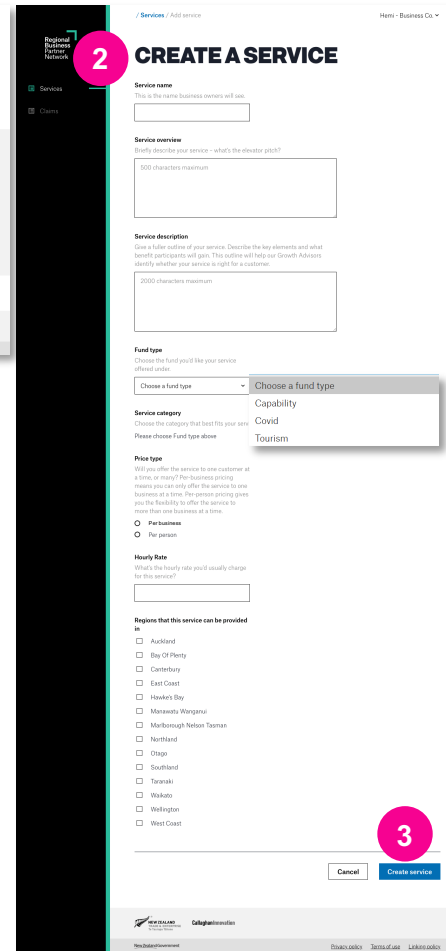
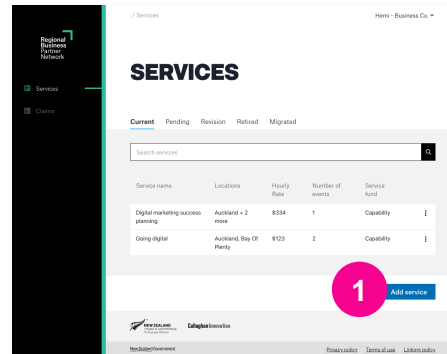
Step 3

Click **create service**

Step 4

Newly created service moves from **current** to **pending** tab *(the RBP team reviews all new services and any updated services)*

Fund type, price type and **service name** are un-editable after a service is created, please check carefully.



IMPORTANT: RBP network manages several **fund types**. Each fund type must meet the eligibility criteria. Find out more information [here](#).

How to create an event

Events are a one-off delivery of your registered service.

Step 1

Go to your **services** dashboard, select one of your registered services. *Refer to Quick Tip note top right.*

Step 2

Click on **actions** dropdown, select **add event**

Step 3

Complete the event details. If this is a one-to-one service, select **private**

Step 4

Click **Create event** button, save successful box will show

QUICK TIP: From the services dashboard, you can quickly access tasks to **Add event**, **Edit Service**, **Retire Service** by click on the 3 dots marked on **Step 1**

The screenshots illustrate the following steps:

- Step 1:** Accessing the 'SERVICES' dashboard. A table lists services with columns for Service name, Locations, Hourly Rate, Number of events, and Service fund. The 'Add event' button in the actions dropdown is highlighted with a red circle '1'.
- Step 2:** Viewing service details for 'DIGITAL MARKETING SUCCESS PLANNING'. The 'Add event' button in the actions dropdown is highlighted with a red circle '2'.
- Step 3:** The 'CREATE AN EVENT' form. Fields for Start date, End date, Delivery Type (Online/In Person), Instructor, and Event Type (Public/Private) are visible. A red circle '3' highlights the form area.
- Step 4:** The 'CREATE AN EVENT' form with the 'Create event' button highlighted with a red circle '4'.

How to make a claim and invoice

Select **claims** in navigation menu

Step 1

Click on **make a claim** button
Follow the 3-step process below

Step 2

Select bookings you intend to claim against by ticking the box and click on **continue**

Step 3

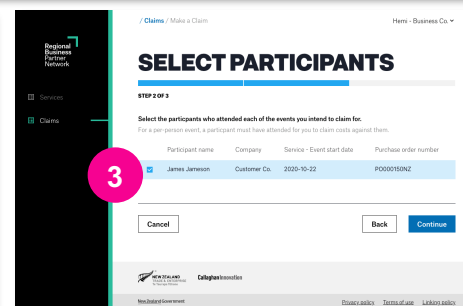
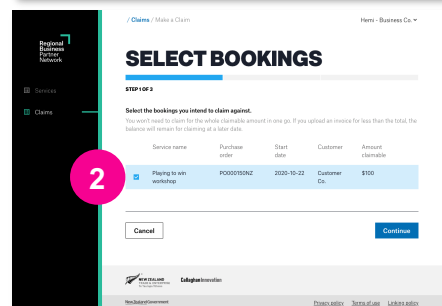
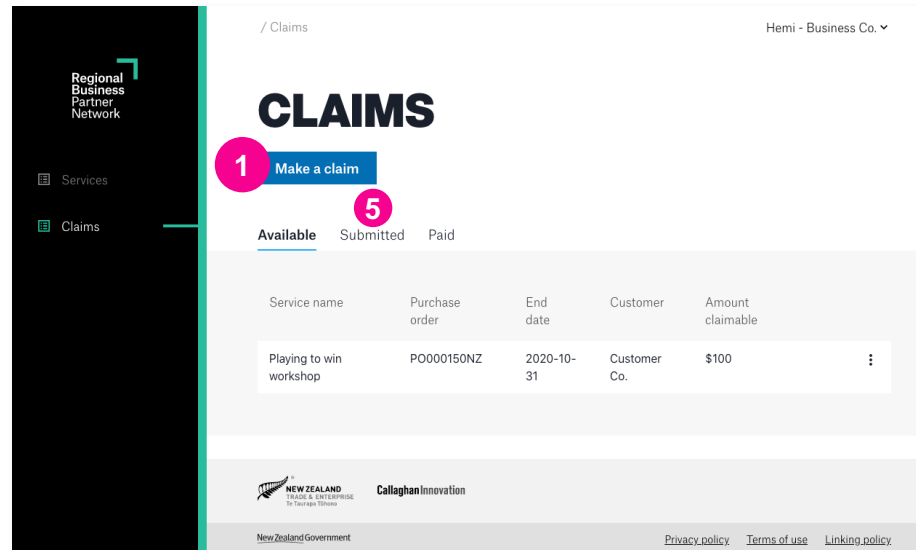
Select the participants who attended each of the events you intend to claim for by ticking the box and click on **continue**

Step 4

1. Enter the **total** amount you're claiming
2. Upload your **invoice**
(click to view a [sample invoice PDF](#))
3. Enter your **invoice number**
4. Click on **continue**

Step 5

To view claim, click on **submitted**



QUICK TIP: Claims can be made in part payments or one full payment.
For **part claims** you will need to have started your first session and progressed through each session according to the event setup.
Full and Final claims can only be claimed once the event has been completed.

