Regional Business Partner Website Guide for Service Providers

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SECTION 1 – INTRODUCTION

Using this website you will be able to create your own unique company profile, and list the services you want to register with the Management Capability Development Voucher Fund delivered by Regional Business Partner Network (RBP) Growth Advisors.

The services will be visible in the website Marketplace which businesses can search when seeking out suitable services. Details about registering are provided in Section 2 of the Manual.

About the Regional Business Partner Website

The Regional Business Partner website has been developed by New Zealand Trade and Enterprise (NZTE) and Callaghan Innovation with different user groups in mind.

Who Will Use the Regional Business Partner Website:

The groups that will use the website are:

Businesses	Growth Advisors	Service Providers	Fund Providers (NZTE)
Business Owners will:	Will use this site to:	Will use this site to:	Will use this site to:
Register their interest in	Manage Customer	Register management	Register Providers to
accessing support to	Information	training services.	deliver training services
grow their business.	Allocate vouchers to	Set up training events	under the voucher
Use the Marketplace to	businesses where	for businesses to book	fund.
find potential training	Management Training is	on.	Manage the voucher.
providers	a barrier to growth	Confirm bookings from	funds across the
Book training services		Businesses	country
using their vouchers		Claim voucher Funding	
		once services are	
		delivered.	

Management Capability Development Voucher Fund

The Management Capability Development Voucher Fund provides financial subsidy of up to 50% towards the cost of management capability building for eligible businesses. The maximum amount a business can receive in one year is \$5,000 excluding GST

Registered Services

Registered Services are the services that NZTE agrees to register for the Capability Development Voucher Fund. The categories services can be registered under are **Business Planning**, **Business Systems**, **Business Sustainability**, **Capital Raising**, **Export**, **Finance**, **Governance**, **Lean Manufacturing**/ **Business Operations**, **Managing Resources**, and **Marketing**.

¹eligible business – click <u>here</u> to see eligibility criteria for businesses

²Registered services: these have been registered under the NZTE Capability Development Scheme.



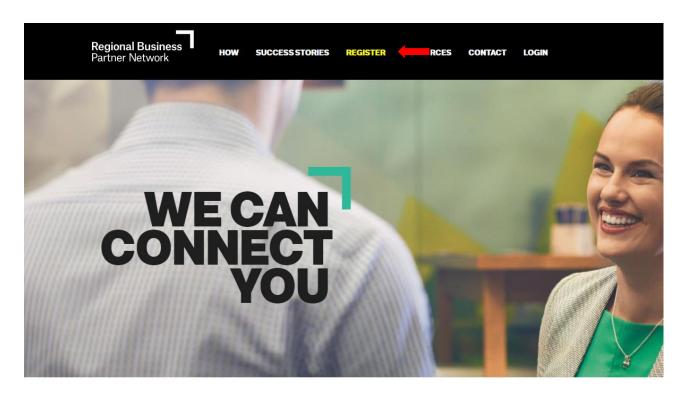
SECTION 2 - REGISTRATION

How to become registered as a Service Provider

- <u>Part 1:</u> register your organisation as a new provider on the Regional Business Partner (RBPN) website at www.regionalbusinesspartners.co.nz
- Part 2: Complete the Registration / Expression of Interest (EOI) process,
 - Down load required EOI Form
 - Ensure you are logged back in to the RBPN website and upload the completed registration document.
 - Create a service by entering the details of the training service/s you offer directly into RBPN, you
 may create one or more services.
 - o submit your EOI to NZTE.
- <u>Part 3:</u> NZTE will review your submission and either accept, or decline, your submission. If the submission is declined NZTE will advise why.

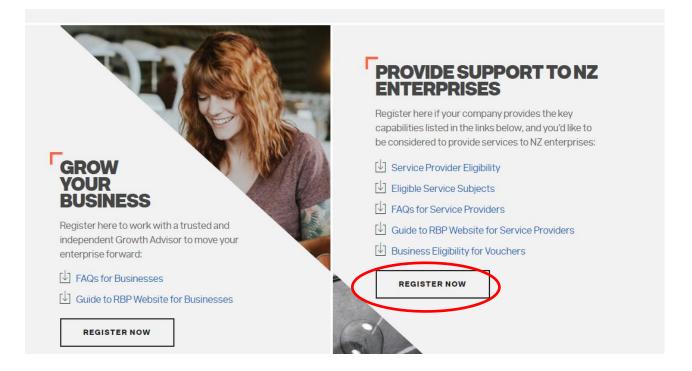
Part 1: Regional Business Partner Registration

1. To register on the Regional Business Partner website, go to www.regionalbusinesspartners.co.nz and click Register



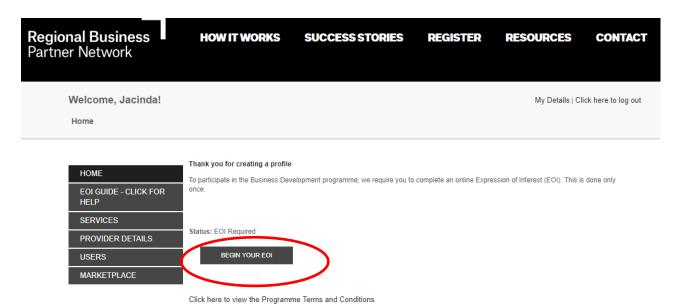


Our Growth Advisors take a birds-eye look at your whole business, then help you connect with the right resources and experts so you can build capability and grow. As part of a national network of people who can help, we're your first port of call when you want to grow your 2. Click 'Register Now', on the right hand side of the page to register as a Service provider.



- 3. Enter your Details to create a profile for your organisation
- 4. Enter your user details to create your personal login information, please remember you User Name and Password as you will need these to log in infuture.
- 5. Confirm your email address. Once you have registered an automated confirmation email will be sent to your email address to ensure we have a valid email address.
 - Check your email account and click on the link to confirm your email address. If you do not receive an email first check your spam/junk folder; if it is not there contact the Helpdesk on 0800 287 467.
 - Once your email address is confirmed, you can log in to the Regional Business Partner Website
 by clicking on the Login link on the top right of the page, or using the original URL
 (www.regionalbusinesspartners.co.nz) and clicking Login.

Once logged in, your home page will look like this:

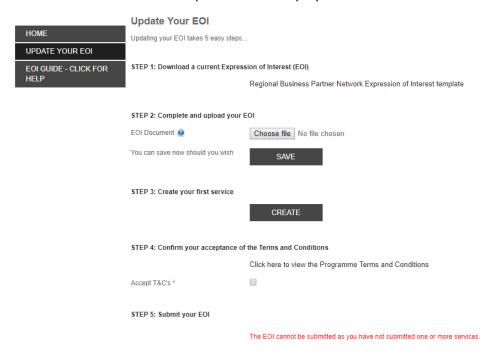


Part 2: Service Provider Expression of Interest process

Now that you are registered on the Regional Business Partner Website you will need to submit an Expression of Interest (EOI) to NZTE along with 1 or more services you wish to register. Note, once your registration is accepted you can submit new services for registration at any time.

To do this click on the "BEGIN YOUR EOI" button

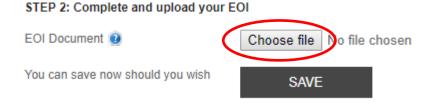
Your screen will show the 5 step EOI Process displayed below:





Step 1: Download and save the "Regional Business Partner Network Expression of Interest template". Then complete the required fields, sign the declaration and save.

Step 2: Click "Choose File" to search for the document saved above and select it to upload, then click "Save"



Step 3: Click "Create" to set up one or more services, the following screen will come up.

Create New Service	
* indicates a required field.	
Service Details	
Service Name * 0	
Description * 0	
	Given the number of providers registered on the website we suggest the following
	format for the service description to enable businesses to make a more informed choice:
	Is it a workshop, or one on one training? What does the training consist of? Course content.
	What are the learning outcomes for the business owner?
	What is the time commitment for the business?
	What is the cost of the service?
Category Registrations	

Service Category	Fund Provider	Request Registration	Comments	History
Business Planning	NZTE	Request Registration		
Business Sustainability	NZTE	Request Registration		
Business Systems	NZTE	Request Registration		
Capital Raising	NZTE	Request Registration		
Export	NZTE	Request Registration		
Finance	NZTE	Request Registration		
Governance	NZTE	Request Registration		
Lean	MZTE	Doguest Posistration		

Enter the following information:

Service Name: The service will appear in the marketplace under this name / title. *The name and description will be checked and registered by NZTE.*

Regional Business Partner Network

Description: The description appears in the marketplace and describes the service offered. Your description MUST cover the following points as a minimum;

- Style of training, is it a workshop, or one-to-one training?
- What does the training consist of?
- What are the learning outcomes for the business owner?
- What is the time commitment for the business owner?
- What is the cost of the service? Note only costs directly associated with training are eligible for voucher subsidy.

This is checked and registered by NZTE.

Category Registrations: A service can cover one or more categories, tick the categories applicable to the service. This is checked and registered by NZTE.

Service Regions: Regions where the service is available. You can modify regions at any time without going through the registration process.

Then click "Save"

Step 4: read the Programme Terms and Conditions and check the tick box.

Step 5: Submit your registration

Part 3: NZTE Review

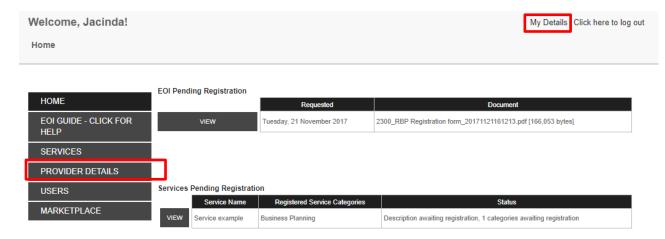
NZTE will review your registration / EOI document and review your service. This will be reviewed and responded to within 5 - 10 working days.

SECTION 3 – COMPLETE PROVIDER SETUP

With your registration either complete or underway here are some additional setup actions you can take to complete your company profile setup.

Updating details:

Click "My Details" to update your personel details and change your password Click "Provider Details" to update your organisation details.



Setting up new Users:

Step 1: To create new users click "Users" then "Create new Users"



Step 2: Fill out the details for the new user then click Create

* indicates a required field. User Details Title First Name * Last Name * Email Address * Phone Number Administrator CREATE * indicates a required field. User Details Title T CANCEL

Step 3: Send Registration code to the new user. The following screen will come up once you click create, please follow the instructions to send the code to the new user.

User Successfully Created

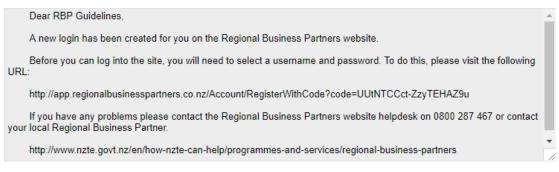
A user account for RBP Guidelines has been partially registered. This user's registration code is:

UUtNTCCct-ZzyTEHAZ9u

RBP Guidelines can complete his/her registration by visiting this website (http://app.regionalbusinesspartners.co.nz/) and registering with the above registration code. He/she can also register by simply visiting the following URL:

http://app.regional business partners.co.nz/Account/RegisterWithCode?code=UUtNTCCct-ZzyTEHAZ9unders.co.nz/Account/RegisterWithCode=UUtNTCCct-ZzyTEHAZ9unders.co.nz/Account/RegisterWithCode=UUtNTCCct-ZzyTEHAZ9unders.co.nz/Account/RegisterWithCode=U

You will need to send the registration code to RBP Guidelines (RBP.Guidelines@Example.nz). Below is a sample email message you can send to RBP Guidelines containing all the information he/she needs. You can use this message as-is, alter it, or send a completely new email message. The important part is that the user gets the registration code and instructions on how to use it.



You can send this message by completing the following steps:

- 1. Right click on the message text above and select Copy.
- Create a new email message addressed to RBP.Guidelines@Example.nz. This can be done by clicking on the link, or opening your email client (e.g. Outlook or Hotmail) and entering 'RBP.Guidelines@Example.nz' in the subject line.
- 3. In your email message, right click in the message body and select Paste.
- 4. Enter a subject line, edit the message if you wish, and send it.

Adding your logo to your Provider Details

Step1: Click "Provider Details" then click "Logo"

Home > Provider Betails	Home	> Provider Details		
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	_ RBP Guidelines example	
HOME	Provider	
SERVICES	Provider Trading Name	RBP G
PROVIDER DETAILS	Legal Business Name	RBP G
F EDIT	GST Number	456789
FLOG0	Company Office Registration	456789
USERS	Primary Business Location	Welling
MARKETPLACE	Contact Person Name	Jacinda
	Contact Person Email Address	jacinda
	Primary Physical Location	test Pro

Step 2: Click "Edit Logo"

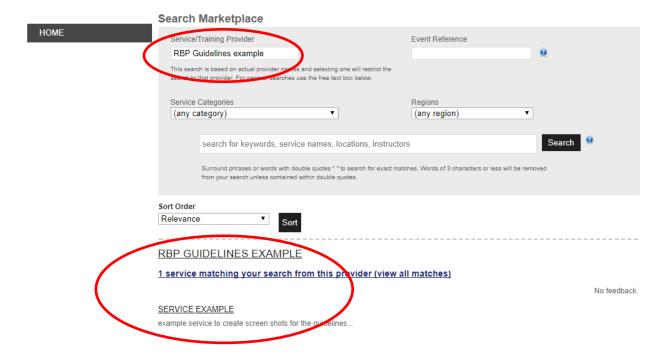
Step 3: Upload your logo file from your desk top

Then click the EDIT logo link, and upload a logo from your computer. **NOTE:** The logo must be a max of 200 pixels x 200 pixels. This is due to the large number of logos, and information, loaded into the application – large logos would slow the activity speed of the website.

Edit Logo Logo Details		
	You can upload a new ima	age file and/or edit the alternate text here.
Image File	Choose file No file ch	nosen
Alternate Text		
	SAVE	CANCEL

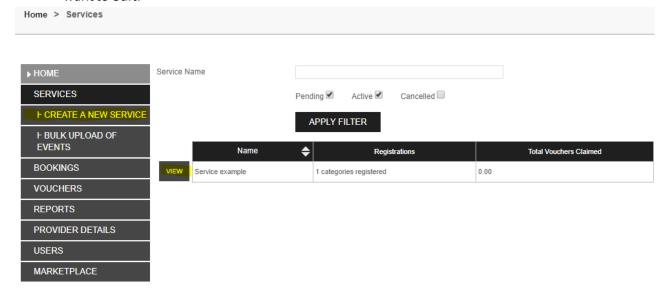
Services and the Marketplace

Once one or more of your services have been registered they will appear in the Marketplace for all to see. Businesses find your services using a range of search options. See screen shot of search and results shown below



Create a new service or edit existing services

- To create a New Service click on "Services" then "Create a New Service"
- To edit and existing service click "Services" then Click the "Veiw" button next to the Service you want to edit.

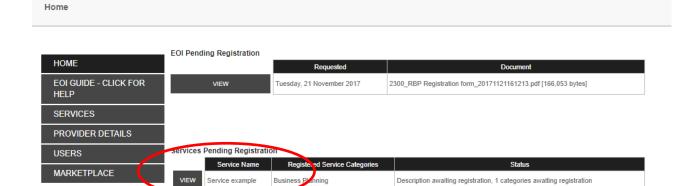


My Details | Click here to log out

NOTE:

Welcome, Jacinda!

- You can not edit a Service Name once the service has been registered.
- Changing the description of the service will hide the service from the Marketplace until NZTE has checked and re-resgitered the service.
- Whilst the service is being reviewed, it will show as a "service Pending Registration" on your HOME page. Once NZTE has confirmed the registration, it will disappear from here and be visible in the Marketplace again.



SECTION 4 - EVENTS

Creating Events

You must create and Event before a business can book on your service with the voucher. While the service description tells the business owner what your training covers the Event provides all the information on dates and location of training.





Website: http://www.regionalbusinesspartners.co.nz

Events

Phone: 041234657

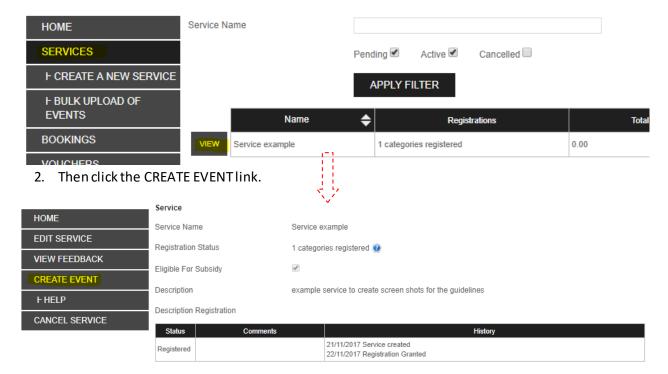
You can book directly onto the events below or contact Jacinda Swain on 041234657 or jacinda.swain@nzte.govt.nz to discuss further training options.



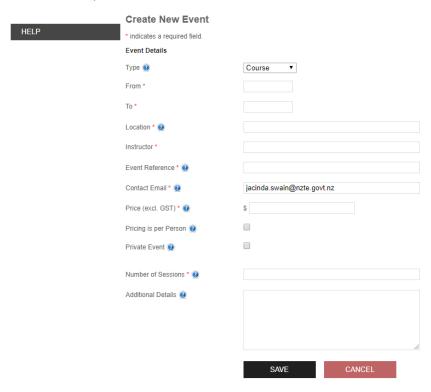
Create an Event

To Create an Event

1. click "Services" then click the "VIEW" view button next to the relevant service that you wish to create the event for and



3. Enter your event details and save



Notes on entering Event Details:

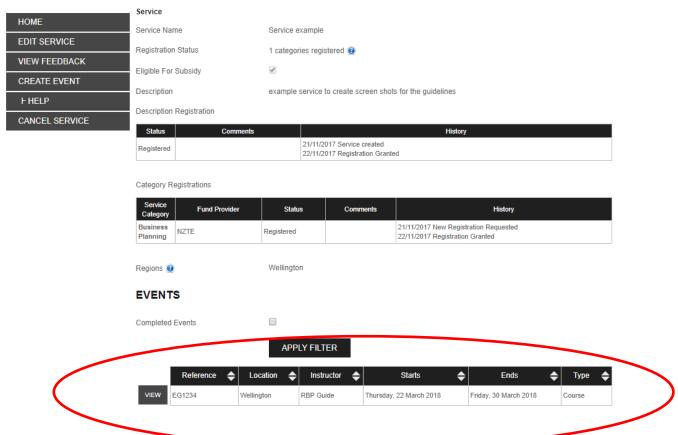
"From" Date: this must be a date in the future as businesses will not be able to book on courses retrospectively.

"Event Reference": Ensure you give this piece of information to any customers intending to book on your event. This filed is important as businesses can use it to find your event easily on the market place.

"Price": Always enter the Full cost of the event as vouchers booked onto the event will automatically be reduced to 50% of the "event cost" if this value is less than the amount the voucher was issued for. This is because businesses must also pay at least 50% of the cost of training.

"Private Event": Select this when and event is being set up specifically for one business. When you tick the box a text field will come up that you can start typing the business name into and when you see it come up select it from the list.

Once created all events will show up at the bottom of the page for the service, you can apply the tick box filter to show just the completed events (including all events that have reached their end date)

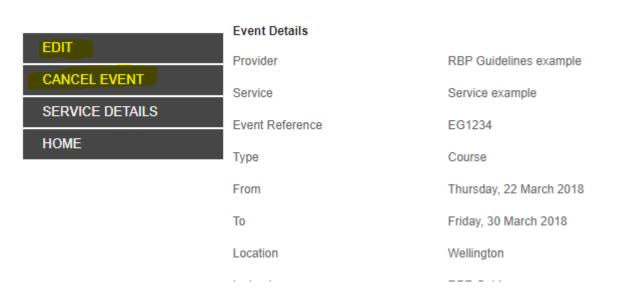


Edit/Cancel Events

If you need to edit or cancel events this can be done by viewing the service on the services page then clicking the "View" button next to the event



Then clinking either "Edit" or "Cancel Event"

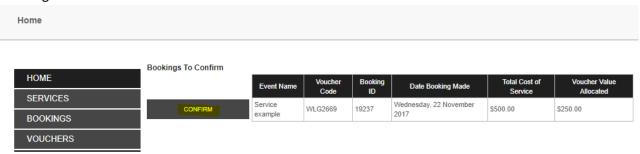


Note: Clicking the "Cancel Event" link will ask you to confirm that you wish to cancel the Event. Once cancelled an email is sent to any business owners booked on the Event.

SECTION 5 – BOOKINGS

Confirming/Cancelling bookings

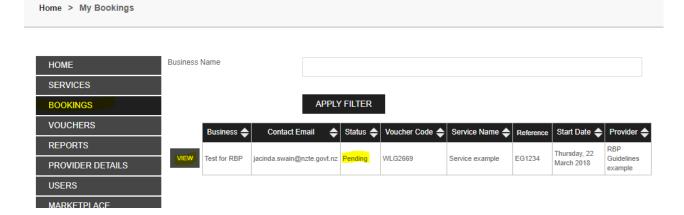
When a service is booked by a business you will get a notification on your HOME page showing you have a booking that needs confirmation.



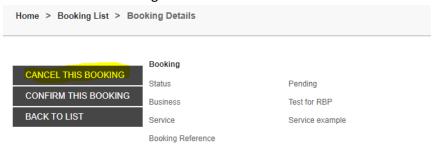
To confirm the booking, click "CONFIRM". This will send an email notification to the business (confirming the booking) and will update your HOME page.

Cancelling a Booking

- 1. Click on the "Bookings" tab on the left hand menu. This will provide a list of ALL bookings paced by businesses on your events.
- 2. Search for a booking with the search field for "Business Name". Click on the VIEW button of the booking you want cancel

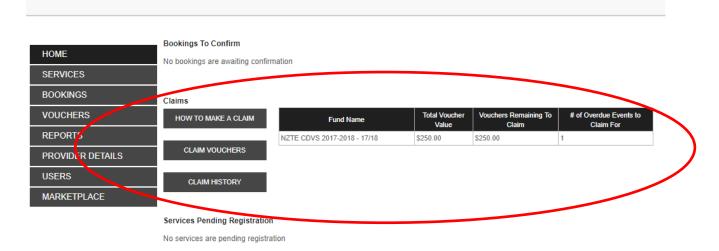


3. Click "Cancel this Booking".



SECTION 6 – CLAIMING A VOUCHER

The CLAIMS section will appear on your home page when an event a voucher is booked on has started.

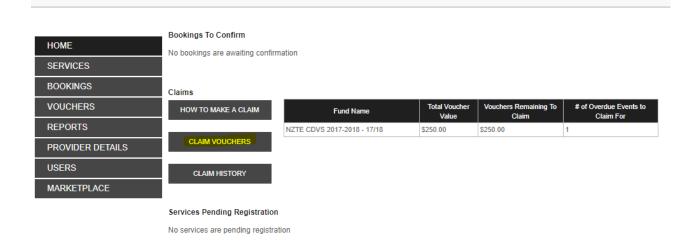


Making a Claim

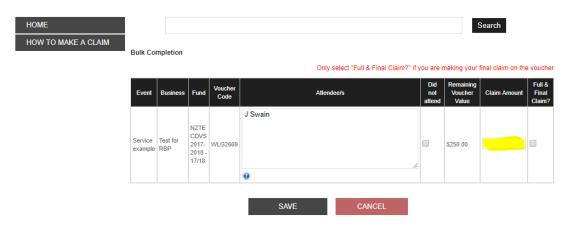
Home

Home

1. Select CLAIM VOUCHERS on your HOME page.

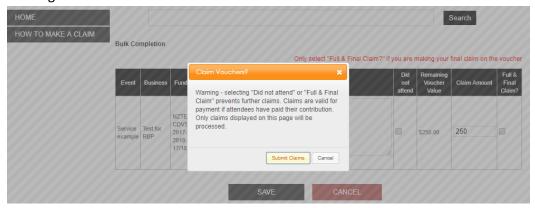


- 2. Enter the amount you are claiming. Note you can only claim for 50% of the cost of training that has been delivered.
- 3. If this is the final claim you will be making tick the "Full and Final Claim" box.



Note:

- Attendee/s: This will show the names of the attendees initally booked on the event.
 Please update if a different person attended the event. You can edit the names as required
- **Did Not Attend:** If the attendee did not attend the event, please tick this box. NZTE will not pay for services when there is non attendance.
- Full & Final Claim: Do not check the "Full and Final Claim" box until the final training session has been completed. Claims can be made at the end of each month and this process should be followed until the event sessions are complete.
- 4. Click SAVE
- 5. The next screen will show a warning message, ensuring that you are happy to complete a claim. Claims should only be made when you have received the client's share of the payment for the training.

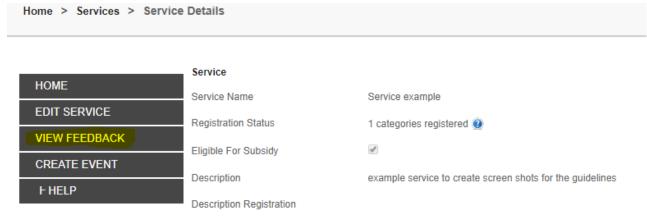


6. Once you have entered the Claim details in the website you will need to issue and invoice to NZTE/Your invoice needs to include the voucher numbers, name of the company that attended and name of registered service.

SECTION 7 – FEEDBACK & REPORTS

Once a business has completed their training, they will be sent an automated email requesting feedback on the training service and the degree that the service added value to their business.

The feedback ratings will be visible in the Marketplace for other businesses to see and you can also review them by clicking on Service Details and selecting the "Feedback" link or running the feedback report.



Reports

Clicking on the REPORTS tab from your HOME page will allow you to see three reports which you are able to run.



