Regional Business Partner Website Guide for <u>Service Providers</u>

July 2020



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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 RBP Voucher Funding schemes administered 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 this guide.

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 services.	Register Providers to	
accessing support to	Information	Set up events for	deliver services under	
grow their business.	Allocate voucher	businesses to book on.	the voucher funding	
Use the Marketplace to	funding to businesses.	Confirm bookings from	schemes.	
find potential training		Businesses	Manage the voucher.	
providers		Claim voucher Funding	funds across the	
Book training services		once services are	country	
using their vouchers		delivered.		

Registered Services

Registered Services are the services that NZTE agrees to register for the Voucher Funding schemes available.

RBP Voucher Funding Schemes:

The RBP network may at times administer more than one funding scheme on the RBP website. Current Funding Schemes are:

1. 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 may receive in one year is \$5,000 excluding GST. 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.

2. COVID-19 Business Advisory Funding

The Covid-19 Business Advisory Funding provides financial subsidy of up to 100% towards expert advice to support businesses impacted by the COVID-19 outbreak. The maximum amount a business may receive is \$5000. Categories services can be registered in are COVID-19 Support (compulsory category), Digital Enablement (if relevant to your service)

Business Eligibility

Management Capability Development Fund Business Eligibility click <u>here</u> COVID-19 Business Advisory Support Fund business eligibility click <u>here</u>



SECTION 2 - REGISTRATION

How to become registered as a Service Provider

- Part 1: create a profile for your business on the Regional Business Partner (RBP) website
- <u>Part 2</u>: Complete the Registration / Expression of Interest (EOI) process,
 - Down load required EOI Form and save it to your desktop.
 - Open the saved Form and fill it out.
 - \circ $\;$ Log back in to the RBPN website and upload the completed registration document.
 - Create a service by entering the details of the service/s you offer directly into the RBP Website, you may create one or more services.
 - Click Submit.
- <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 <u>www.regionalbusinesspartners.co.nz</u> and scroll down to the 'Provide support to New Zealand Businesses' section and click Register here

Provide support to I	New Zealand businesses
	Register now if your company provides the key capabilities listed in the links below, and you'd like to be considered to provide services to New Zealand businesses.
	Helpful resources: Service provider eligibility
	Eligible service subjects
	RBP Programme handbook for service providers
	RBP website User Guide for service providers
	Communication Guidelines for services providers

- 2. Enter your Details to create a profile for your organisation
- 3. 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 in future.
- 4. 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 button on the RBP website, or using the original URL (www.regionalbusinesspartners.co.nz) and clicking Login.



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

Regional Business Partner Network	HOW IT WORKS	SUCCESS STORIES	REGISTER	RESOURCES	CONTACT
Welcome, Jacinda! _{Home}				My Details Cli	ick here to log out
HOME E0I GUIDE - CLICK FOR	Thank you for creating a profile To participate in the Business Deve once.	elopment programme, we require you to	complete an online Expre	ssion of Interest (EOI). This is	done only
HELP SERVICES PROVIDER DETAILS	Status: EOI Required				
USERS	BEGIN YOUR EOI				

Click here to view the Programme Terms and Conditions

MARKETPLACE

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 more 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" to your desktop. Then complete the required fields, sign the declaration and save.

HOME UPDATE YOUR EOI	Update Your EOI Updating your EOI takes 5 easy steps		
EOI GUIDE - CLICK FOR HELP	STEP 1: Download a current Expression of Interest (EOI) Regional Business Partner Network Expression of Interest template		
	STEP 2: Complete and upload your	EOI	
	EOI Document 🥹	Choose file No file chosen	
	You can save now should you wish	SAVE	
	STEP 3: Create your first service	CREATE	
	STEP 4: Confirm your acceptance of	of the Terms and Conditions	
	Accept T&C's *		
	STEP 5: Submit your EOI		
		The EOI cannot be submitted as you have not submitted one or more services.	

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









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 Manufacturing/Rusiness	NZTE	Desured Desistration		

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.*

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

- Style of Delivery, is it a workshop, or one-to-one training?
- What does the service consist of?
- What are the 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 delivery to the business owner are eligible for voucher funding.

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.

Management Capability Categories: Business Planning, Business Systems, Business Sustainability, Capital Raising, Export, Finance, Governance, Lean Manufacturing/ Business Operations, Managing Resources, and Marketing.

COVID-19 Business Advisory Funding: COVID-19 Support (compulsory), Digital Enablement (if relevant)

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.

If your service is rejected you will receive and email, please click the link in the email to read the reason it was rejected.

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

Welcome, Jacinda!	My Details Click here to log out
Home	

	EOI Pending Registration		
HOME	THE CO. DESCRIPTION	Requested	Document
Eoi Guide - Click For Help	VIEW	Tuesday, 21 November 2017	2300_RBP Registration form_20171121161213.pdf [166,053 bytes]
SERVICES			
PROVIDER DETAILS			
USERS	Services Pending Registrat	tion	
	Service Name	Registered Service Categories	Status
MARKETPLACE	VIEW Service example	Business Planning	Description awaiting registration, 1 categories awaiting registration

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

Create New Provider Us	ser			
* indicates a required field.				
User Details				
Title		¥		
First Name *				
Last Name *				
Email Address *				
Phone Number				
Administrator				
		CREATE	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.regionalbusinesspartners.co.nz/Account/RegisterWithCode?code=UUtNTCCct-ZzyTEHAZ9u

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.

Dear RBP Guidelines.

A new login has been created for you on the Regional Business Partners website.

Before you can log into the site, you will need to select a username and password. To do this, please visit the following URL:

http://app.regionalbusinesspartners.co.nz/Account/RegisterWithCode?code=UUtNTCCct-ZzyTEHAZ9u

If you have any problems please contact the Regional Business Partners website helpdesk on 0800 287 467 or contact your local Regional Business Partner.

http://www.nzte.govt.nz/en/how-nzte-can-help/programmes-and-services/regional-business-partners

You can send this message by completing the following steps:

- 1. Right click on the message text above and select Copy.
- 2. 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

HOME

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

Home > Provider Details

	Provider	
SERVICES	Provider Trading Name	RBP G
PROVIDER DETAILS	Legal Business Name	RBP G
F EDIT	GST Number	456789
F LOGO	Company Office Registration	456789
USERS	Primary Business Location	Welling
MARKETPLACE	Contact Person Name	Jacinda
	Contact Person Email Address	jacinda
	Primarv Physical Location	test Pro

RBP Guidelines example

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.





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

	Search Marketplace					
HOME	Service/Training Provider	Event Reference				
	RBP Guidelines example		9			
	This search is based on actual provider names and selecting one will restrict the new blocks to that provider. For open researches use the free text box below.					
	Service Categories	Regions	7			
L	(any category)	(any region)				
	search for keywords, service names, locations, instructors					
	Surround phrases or words with double quotes " " to search for exact matches. Words of 3 characters or less will be removed from your search unless contained within double quotes.					
	Sort Order Relevance Sort					
	RBP GUIDELINES EXAMPLE					
	1 service matching your search from this provider (view all matches)					
	SERVICE EXAMPLE		No feedback.			
	example service to create screen shots for the querelines					

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 "View" button next to the Service you want to edit.

Home > Services

▶ HOME	Service Name		
SERVICES		Pending 🗹 Active 🗹 Cancelled 🗌	
F CREATE A NEW SERVICE		APPLY FILTER	
F BULK UPLOAD OF Events	Name	Registrations	Total Vouchers Claimed
BOOKINGS	VIEW Service example	1 categories registered	0.00
VOUCHERS			
REPORTS			
PROVIDER DETAILS			
USERS	8		
MARKETPLACE			

NOTE:

- 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.
 - If the service is rejected it will still show in your services and you can review the reasons for rejection and make corrections if needed.

Welcome, Jacinda!			My Details Click here to log out
Home			
2	EOI Pending Registration		
HOME	THE STOCE ADDRESS STOCKED	Requested	Document
EOI GUIDE - CLICK FOR HELP	VIEW	Tuesday, 21 November 2017	2300_RBP Registration form_20171121161213.pdf [166,053 bytes]
SERVICES			
PROVIDER DETAILS			
USERS	services Pending Registrat	1011	
	Service Name	Registe ed Service Categories	Status
MAINETTEACE	VIEW Service example	Business Planning	Description awaiting registration, 1 categories awaiting registration

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.



	Туре	Price (excl. GST)	Per Person	Reference	Location	Instructor	Starts	Ends	Additional Details
MAKE BOOKING	Course	\$500.00		EG1234	Wellington	RBP Guide	Thursday, 22 March 2018	Friday, 30 March 2018	Details



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

HOME	Service Nar	ne			
SERVICES			Pendin	g 🗹 Active 🗹 Cancelled 🗌)
F CREATE A NEW SERVIO	CE		AP	PLY FILTER	
F BULK UPLOAD OF EVENTS		Name	\$	Registrations	Total
BOOKINGS	VIEW	Service example	1	categories registered	0.00
2. Then click the CRE	ATE EVENT	link.			
Se	rvice		•		
Se S	rvice Name	Service e	xample		
Re	gistration Status	1 categor	ies registered 🧕		
VIEW FEEDBACK	gible For Subsidy	\$			
CREATE EVENT	corintian	ovampla	convice to create c	oroon chois for the quidelines	
F HELP	scription	example :	Service to create a	screen shors for the guidelines	
CANCEL SERVICE	scription Registration	1			
	Status	Comments		History	
Re	gistered		21/11/2017 Service 22/11/2017 Registr	e created ration Granted	

3. Enter your event details and save

	Create New Event	
HELP	* indicates a required field.	
	Event Details	
	Type 🧕	Course •
	From *	
	To *	
	Location * 🧕	
	Instructor *	
	Event Reference * 🧕	
	Contact Email * 🧕	jacinda.swain@nzte.govt.nz
	Price (excl. GST) * 🧕	\$
	Pricing is per Person 🧕	
	Private Event 🥹	
	Number of Sessions * 🥹	
	Additional Details 🧕	
		SAVE CANCEL

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.

"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)

LIQUE	
HOME Service Name Service example	
EDIT SERVICE Registration Status	
VIEW FEEDBACK	
Eligible For Subsidy	
Description example service to create screen shots for the guidelines	
FHELP Description Registration	
CANCEL SERVICE	
21/11/2017 Service created	
Registered 22/11/2017 Registration Granted	
Category Registrations	
Service Fund Browider Statue Commande History	
Category Fund Providen Status Comments Pristory	
Business Planning NZTE Registered 21/11/2017 New Registration Requested 22/11/2017 Registration Granted	
	1
Regions 🥑 Wellington	
EVENTS	
Completed Events	
APPLY FILTER	
Reference 🗢 Location 🗢 Instructor 🗢 Starts 🗢 Ends 🗢 Ty	pe 🜲
VIEW EG1234 Wellington RBP Guide Thursday, 22 March 2018 Friday, 30 March 2018 Course	e

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

EVENTS

Complete	d Events					
		APP	LY FILTER			
	Reference 🔶	Location 🔶	Instructor 🔶	Starts 🔶	Ends 🔶	Туре 🔶
VIEW	EG1234	Wellington	RBP Guide	Thursday, 22 March 2018	Friday, 30 March 2018	Course

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.

Home								
	Bookings To Confirm							
HOME		Event Name	Voucher Code	Booking ID	Date Booking Made	Total Cost of Service	Voucher Value Allocated	l
BOOKINGS	CONFIRM	Service example	WLG2669	19237	Wednesday, 22 November 2017	\$500.00	\$250.00	
VOUCHERS								

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

Home	>	Му	Bookings
------	---	----	----------

HOME	Business Name	8 C							
SERVICES									
BOOKINGS			APP	LY FILTER					
VOUCHERS	Bus	iness 🚖	Contact Email	Status 🖨	Voucher Code 🔶	Service Name 🔶	Reference	Start Date 🚖	Provider 🚖
REPORTS								Thursday 22	RBP
PROVIDER DETAILS	VIEW Test	for RBP	jacinda.swain@nzte.govt.r	z Pending	WLG2669	Service example	EG1234	March 2018	Guidelines example
USERS									
MARKETPI ACE	17. A								

3. Click "Cancel this Booking".

lome > Booking List > Bo	oking Details	
	Booking	
CANCEL THIS BOOKING	Status	Pending
CONFIRM THIS BOOKING	Business	Test for RBP
BACK TO LIST	Service	Service example
	Booking Reference	



SECTION 6 – CLAIMING A VOUCHER

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

HOME	No bookings are awaiting cont	firmation			
SERVICES					
BOOKINGS	Claims				
VOUCHERS	HOW TO MAKE A CLAIM	Fund Name	Total Voucher Value	Vouchers Remaining To Claim	# of Overdue Events to Claim For
REPORTS		NZTE CDVS 2017-2018 - 17/18	\$250.00	\$250.00	1
PROVIDUR DETAILS	CLAIM VOUCHERS				
USERS	CLAIM HISTORY	월 1			

Making a Claim

1. Select CLAIM VOUCHERS on your HOME page.

Home

HOME	Bookings To Confirm	rmation			
SERVICES					
BOOKINGS	Claims				
VOUCHERS	HOW TO MAKE A CLAIM	Fund Name	Total Voucher Value	Vouchers Remaining To Claim	# of Overdue Events to Claim For
REPORTS		NZTE CDVS 2017-2018 - 17/18	\$250.00	\$250.00	1
PROVIDER DETAILS	CLAIM VOUCHERS				
USERS	CLAIM HISTORY				
MARKETPLACE					
	Services Pending Registration	n			
	No services are pending regist	ation			

- Enter the amount you are claiming. Note you can only claim for eligible cost of the service that has been delivered. The portion will depend on the Funding Scheme being used, i.e. 50% for the Management Capability Development Fund, 100% for the COVID-19 Business Advisory Fund.
- 3. If this is the final claim you will be making tick the "Full and Final Claim" box. Please do not tick this if you are making a part claim.

HOWE TO MAKE A CLAIM	Bulk Co	mpletion			Only select "Full & Final Claim?" If	/011 are r	naking your l	Search	vouche
	Event	Business	Fund	Voucher Code	Attendee/s	Did not attend	Remaining Voucher Value	Claim Amount	Full & Final Claim?
	Service example	Test for RBP	NZTE CDVS 2017- 2018 - 17/18	WLG2669	J Swain		\$250.00		
	-				9				

Note:

- Attendee/s: This will show the names of the attendees initially 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.

HOME	11						Search	
HOW TO MAKE A CLAIM	Bulk Co	mpletion						
			11	Only select "Full & Final Claim?" #	you are i	making your	final claim on the	e voucher
	Event	Business	Fund	Claim Vouchers?	Did not	Remaining Voucher	Claim Amount	Full & Final
	-		100	Warning - selecting "Did not attend" or "Full & Final	attend	Value		Claim?
		vice Test for CC mple RBP 20 17/	NZTE	payment if attendees have paid their contribution. Only claims displayed on this page will be processed.	× 52	\$250.00		
	Service example		CDVS 2017- 2018 17/18				250	
				Submit Claims Cancel				
				SAVE CANCEL				



5. Once a claim is entered into the regional business partners.co.nz website you will need to generate an invoice from your own invoicing system. The invoice will need to be addressed to:

NZTE PO Box 2878 Wellington, 6140

Invoices should be emailed to trainingproviders@nzte.govt.nz

The following information must be included in the Invoice:

- Voucher Code
- Name of the business receiving the training
- Name of the service you delivered to the business
- The net amount you are claiming against the voucher

Multiple vouchers can be invoiced for on one invoice. It is preferred that you only send one invoice to NZTE each month covering all voucher claims for the month.

NZTE does pay the GST relating to the amount of the voucher so please include GST in your invoice.

All invoices are aimed to be paid before the 20th of the month following receipt.

SECTION 7 – FEEDBACK & REPORTS

Once a business has completed their service, 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.

Home > Reports

HOME	Services Report
SERVICES	Vouchers Report
BOOKINGS	Feedback Report
VOUCHERS	
REPORTS	
PROVIDER DETAILS	
USERS	
MARKETPLACE	