



Marketplace Engagement Notice and Billing Report Guide v1.0

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1 Engagement Notices

Suppliers must notify the lead agency (DIA, or MBIE for Construction) within 10 days of signing a contract with an agency for one or more services.

1.1 How to create and submit an Engagement Notice

Log into Marketplace and navigate to “Dashboard” - “Engagement Notices” and click “+NEW ENGAGEMENT NOTICE.”

The screenshot shows the Pae Hokohoko Marketplace interface. At the top, there is a navigation bar with the logo and the text 'Pae Hokohoko Marketplace'. To the right of the logo, there are links for 'Dashboard', 'Supplier details', and 'Users'. A dropdown menu is open, showing 'LIMITED'. Below the navigation bar, there is a sidebar with a 'Dashboard' section containing 'Applications', 'Engagement Notices', and 'Billing Reports'. The 'Engagement Notices' item is highlighted with a red box and labeled '2'. The main content area shows the 'Engagement Notices' page with a '+ NEW ENGAGEMENT NOTICE' button highlighted with a red box and labeled '3'. Below this, there is a 'Draft Engagement Notices' section with a table containing one entry. The table has columns for 'Start Date', 'End Date', 'Agency Name', 'Service', and 'Amount'. The entry has a 'Resume' button and a 'Remove' button. Below the table, there is a note 'Last saved on 18 Oct 2023'.

Fill in the required fields on the “Supplier Contact Details” form and then click “CONTINUE.”

The screenshot shows the 'Supplier Contact Details' form within the Pae Hokohoko Marketplace interface. The top navigation bar includes 'Dashboard', 'Supplier details', 'Users', and 'LIMITED'. A progress indicator at the top shows four steps: 'SUPPLIER CONTACT DETAILS' (active), 'AGENCY CONTACT DETAILS', 'ENGAGEMENT SUMMARY DETAILS', and 'CONFIRMATION'. The form itself has three mandatory fields: 'Contact name *' (with 'jen jentest' entered), 'Contact number *', and 'Contact email *'. A 'CONTINUE' button is located at the bottom right of the form. Below the form are two buttons: 'SAVE PROGRESS' and 'SAVE AND EXIT >'. A 'RETURN TO DASHBOARD' link is visible in the top left corner.

Fields with asterisks are mandatory.

You can save draft details before submitting. Draft engagement notices will be accessible from the Engagement Notices home page.

➤ Agency Contact Details

Fill in the required fields on the “Agency Contact Details” form and then click “CONTINUE.”

When an Agency Job Reference/Purchase Order has been selected, the “SOW Reference Number” will become optional.

◀ RETURN TO PREVIOUS STEP

SUPPLIER CONTACT
DETAILS

AGENCY CONTACT DETAILS

ENGAGEMENT SUMMARY
DETAILS

CONFIRMATION

Agency Contact Details

Agency name *

Agency Job Reference/Purchase Order *

SOW Reference Number

Agency Contact Name *

Agency Contact Number *

Agency Contact Email *

Agency Signatory Name *

Agency Signatory Position *

◀ BACK

CONTINUE

SAVE PROGRESS

SAVE AND EXIT >

➤ Engagement Summary Details

Enter the “Engagement Summary Details” and then click “REVIEW AND CONFIRM.”

On selecting a service from the dropdown, the catalogue and channel will be populated automatically.

[RETURN TO PREVIOUS STEP](#)

SUPPLIER CONTACT
DETAILS

AGENCY CONTACT DETAILS

ENGAGEMENT SUMMARY
DETAILS

CONFIRMATION

Engagement Summary Details

Service 1

Service *

Data Migration Services - (catalogue: Data & Informat

Catalogue

Data & Information Services

Channel

Consultancy and Professional Services

[Add additional service](#)

Engagement Title Description *

test

Amount *

9500

Start Date *

10/01/2023

End Date *

10/12/2023

Comments

test comments

[< BACK](#)

[REVIEW & CONFIRM](#)

[SAVE PROGRESS](#)

[SAVE AND EXIT >](#)

Click "EDIT DETAILS" to edit the corresponding section / page.

Check details on Confirmation page are all correct. Click "SUBMIT" if all of the information is correct.

Confirmation

ⓘ Please confirm all the data has been reviewed and is correct before submitting

Supplier Contact Details

[EDIT DETAILS](#)

Contact name

jen.jentest

Contact number

123

Contact email

test@123.com

Agency Contact Details

[EDIT DETAILS](#)

Agency name

Test Agency

Agency Job Reference/Purchase Order

1

SOW Reference Number

Agency Contact Name

Agency Contact Number

1234

Agency Contact Email

test@testing.com

Agency Signatory Name

test tester

Agency Signatory Position

manager

Engagement Summary Details

[EDIT DETAILS](#)

Service 1

Service

Data Migration Services

Catalogue

Data & Information Services

Channel

Consultancy and Professional Services

Service 2

Service

Advertising

Catalogue

Marketing

Channel

SaaS

Engagement Title Description

test

Amount

\$9,500

Start Date

01/10/2023

End Date

12/10/2023

Comments

test comments

[< BACK](#)

[SUBMIT](#)

➤ Submitted Engagement Notices

Submitted Engagement Notice's will appear under "Submitted Engagement Notices" on the "Engagement Notices" home page.

Engagement Notices + NEW ENGAGEMENT NOTICE

Draft Engagement Notices

1	Resume	Remove		
Last saved on 18 Oct 2023				
Start Date: 01 Oct 2023	End Date: 12 Oct 2023	Agency Name: Agency Test Limited	Service: Data Migration Services Advertising	Amount: \$9,500

No job reference [Resume](#) [Remove](#)

Last saved on 20 Oct 2023

Start Date:	End Date:	Agency Name:	Service:	Amount:
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No job reference [Resume](#) [Remove](#)

Last saved on 18 Oct 2023

Start Date:	End Date:	Agency Name:	Service:	Amount:
--------------------	------------------	---------------------	-----------------	----------------

Submitted Engagement Notices

Test123	Details	Withdraw		
Submitted on 20 Oct 2023				
Start Date: 01 Oct 2023	End Date: 12 Oct 2023	Agency Name: Agency Test Limited	Service: Analytics and Search Engine Optimisation	Amount: \$12,000

1.2 How to withdraw an engagement notice

Reasons for withdrawal may include for example the agency has cancelled the engagement, requested delay in start date, cancellation of the statement of work, funding has been delayed / not received or the supplier no longer provides service.

From the Engagement Notice homepage, click "Withdraw" alongside the Engagement Notice that you want to withdraw.

Submitted Engagement Notices

Test123	Details	Withdraw		
Submitted on 20 Oct 2023				
Start Date:	End Date:	Agency Name:	Service:	Amount:
01 Oct 2023	12 Oct 2023	Agency Test Limited	Analytics and Search Engine Optimisation	\$12,000

Select a reason for withdrawing then click “WITHDRAW ENGAGEMENT NOTICE.”

Withdraw Engagement Notice

Reason for withdrawal *

- Agency has cancelled the engagement
- Agency has requested delay in start date
- Agency has cancelled the SOW
- Agency funding delayed/not received
- Supplier no longer provides the service
- Other

[CANCEL](#) [WITHDRAW ENGAGEMENT NOTICE](#)

When selecting “Other,” the user must type a reason for withdrawing.

The withdrawn Engagement Notice is removed from the Engagement Notice home page.

1.3 How to update or add information to a submitted engagement notice

Contact the Support Services team and request them to change the engagement notice to a “draft” status. Please quote the “Agency Job Reference/Purchasing Order” number when making this request.

A link will be sent to the identified contact that when clicked on, will take the user to the updated engagement notice.

2 Billing Reports

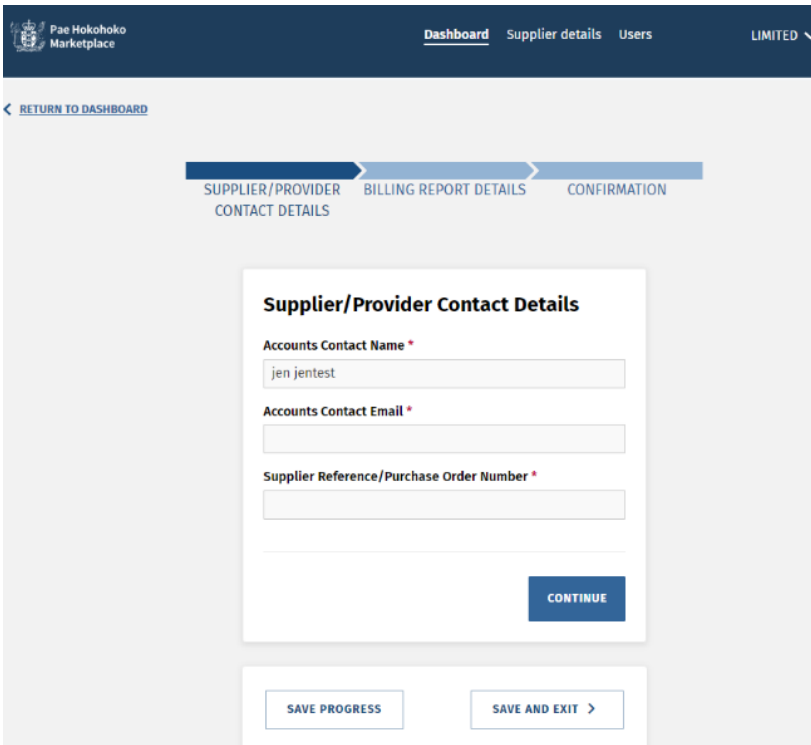
Billing reports need to be provided by suppliers providing agency total consumption of services provided by the supplier. This information will be used to calculate the Lead Agency Fee that the supplier will be invoiced for.

2.1 How to create and submit a Billing Report

On the Dashboard, navigate to “Billing Reports” and click “+ NEW BILLING REPORT.”



Fill in the “Supplier/Provider Contact Details” screen then click “CONTINUE.”



Note:

1.Account Contact Name:

Provide the relevant key contact name for DIA to quote in the Marketplace Lead Agency invoice description.

2.Accounts Contact Email:

Provide your preferred email address where you would like to receive the invoice.

3. Supplier Reference/Purchase Order Number:

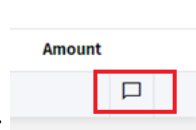
Provide the correct Supplier Reference/Purchase Order Number for the DIA team to quote on the Marketplace Lead Agency Fee invoice. If there is no Purchase Order issued then DIA will quote "MP Lead Agency Fee" as the Supplier Reference/Purchase Order Number. We DO NOT need Agency reference/PO number here.

Fill in the Billing Report Details.

The “Engagement Notice” and “Service” can be selected from dropdowns based on data previously entered in the Engagement Notice.

Dates cannot be in the future.

To duplicate or add a new billing item, click “+DUPLICATE BILLING ITEM” or “ADD NEW BILLING ITEM” respectively.



Click on the following icon to enter a comment:

Click the “REVIEW AND CONFIRM” button.

Confirm data entered is correct on the Confirmation page. If so, click Submit.

Submitted Billing Reports will be displayed on the Billing Reports home page under the “Submitted billing reports” section.

3 Engagement Notice and Billing Report Reminders

Engagement Notice and Billing report reminders will be automatically sent to the supplier contact email each quarter on the 20th of March, June, September and December reminding suppliers to complete engagement notices and quarterly billing report. Suppliers who have already submitted reports for that month will not be sent a reminder. Reminders will also be sent regarding overdue quarterly billing reports.

4 Access

4.1 How to give a new user access

Log into Marketplace using an administrator account. On the dashboard navigate to the “Users” screen by clicking on “Users,” and then clicking “+ NEW USER”.

Complete the form and click “CREATE NEW USER.”

The "Role / Title" is for your own use.

New User

Invite a new user to the supplier listing:
TEST SAFE LIMITED

Name *

Email *

Role / Title *

Permission level *

Select one ▼

CREATE NEW USER

Permission levels are as follows:

- "user" - can create and view applications, communicate with the assessors and create, and have full access to the engagement notices and billing reports features discussed above.
- "admin" - can create and view applications, communicate with the assessors, add additional team members within suppliers, update company information, and have full access to the engagement notices and billing reports features discussed above.