Pae Hokohoko Marketplace

Marketplace Engagement Notice and Billing Report Guide v1.0

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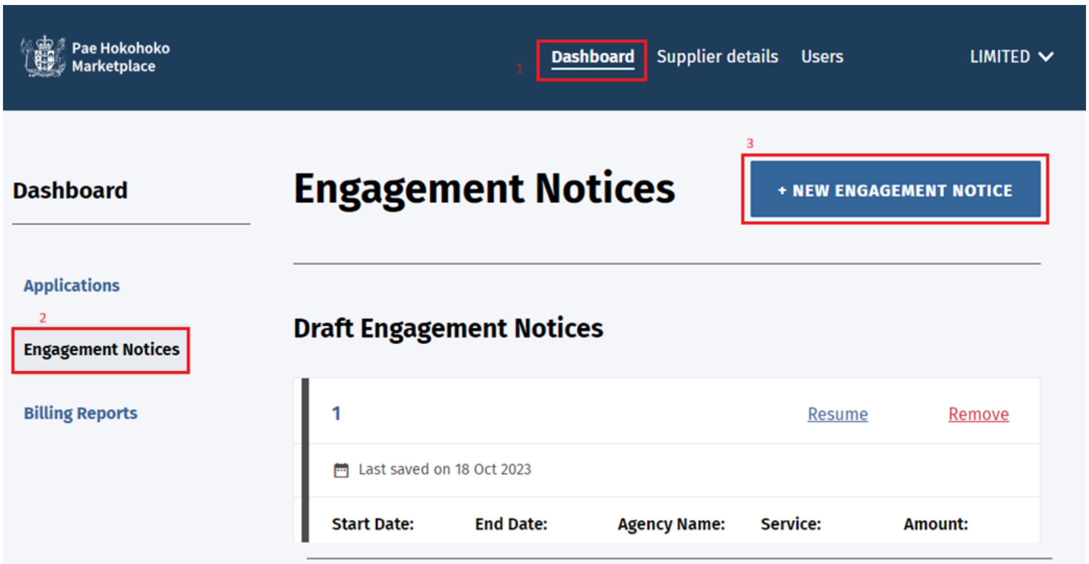
1 Engagement Notices

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.

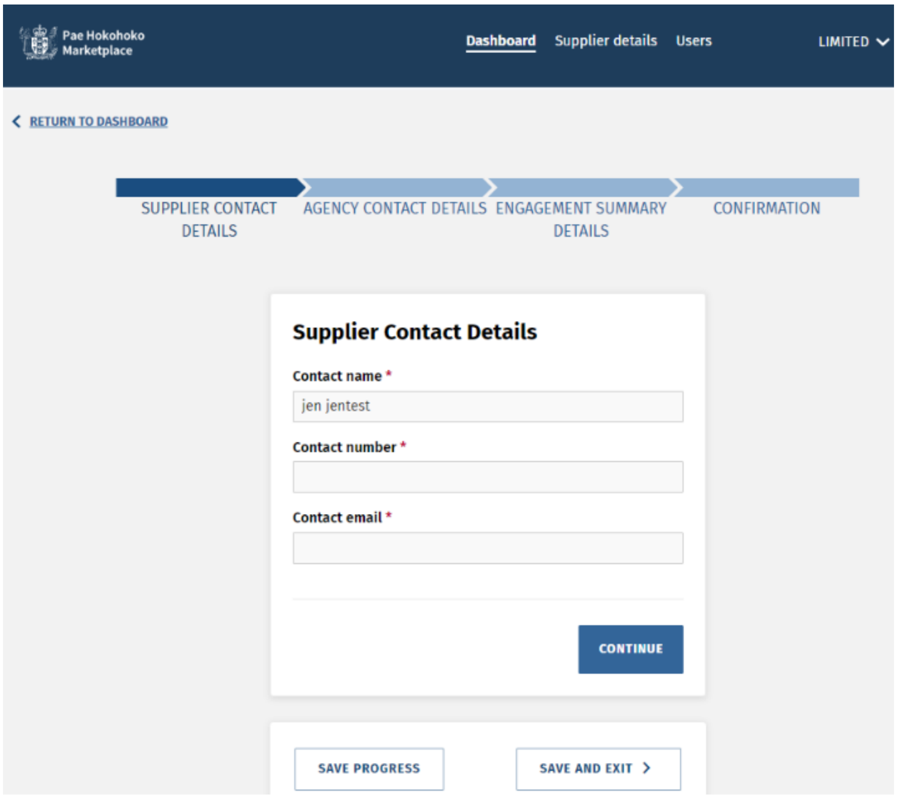
1.1 How to create and submit an Engagement Notice

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



- **Supplier Contact Details**

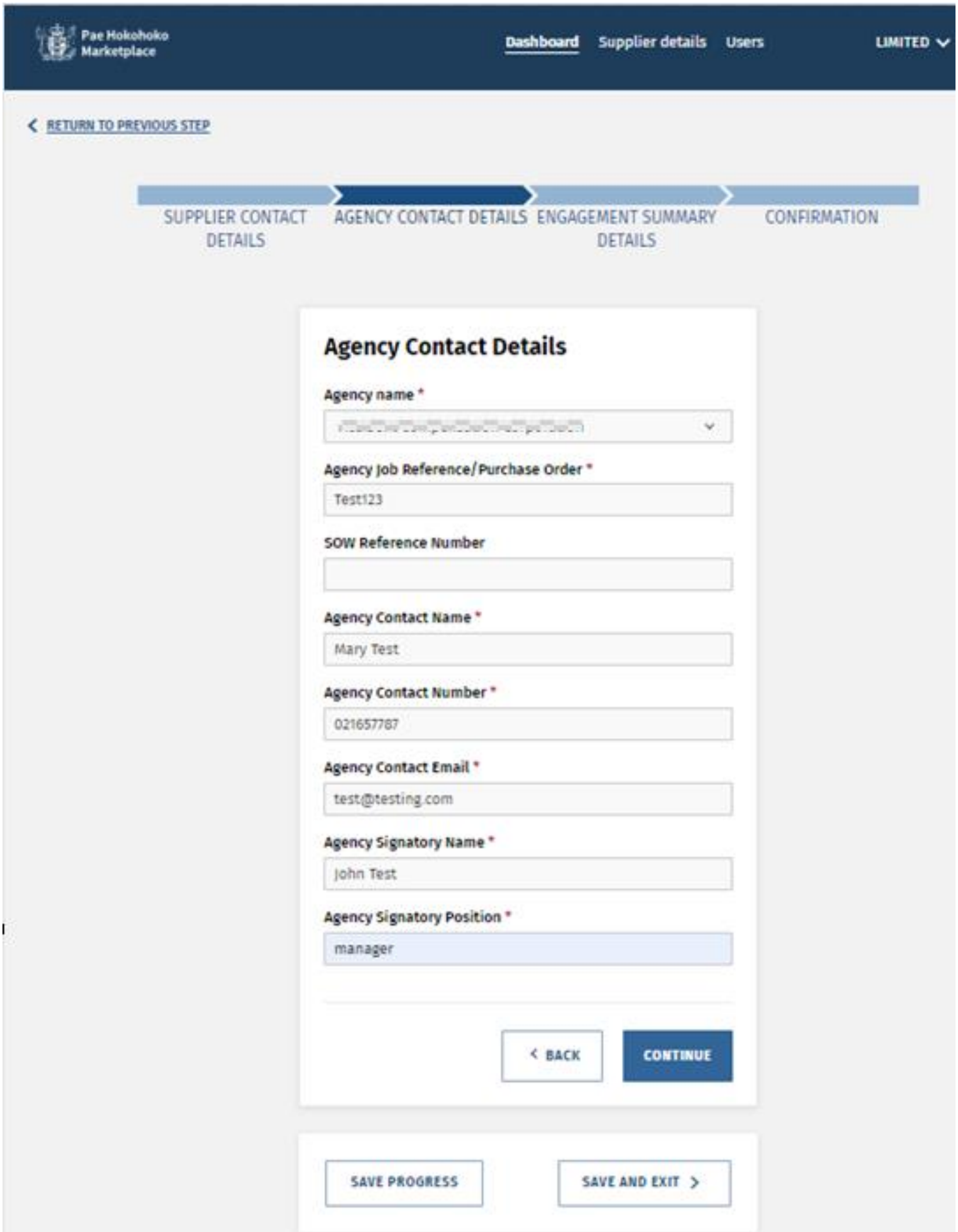
Fill in the required fields on the “Supplier Contact Details” form and then click “CONTINUE.”



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**

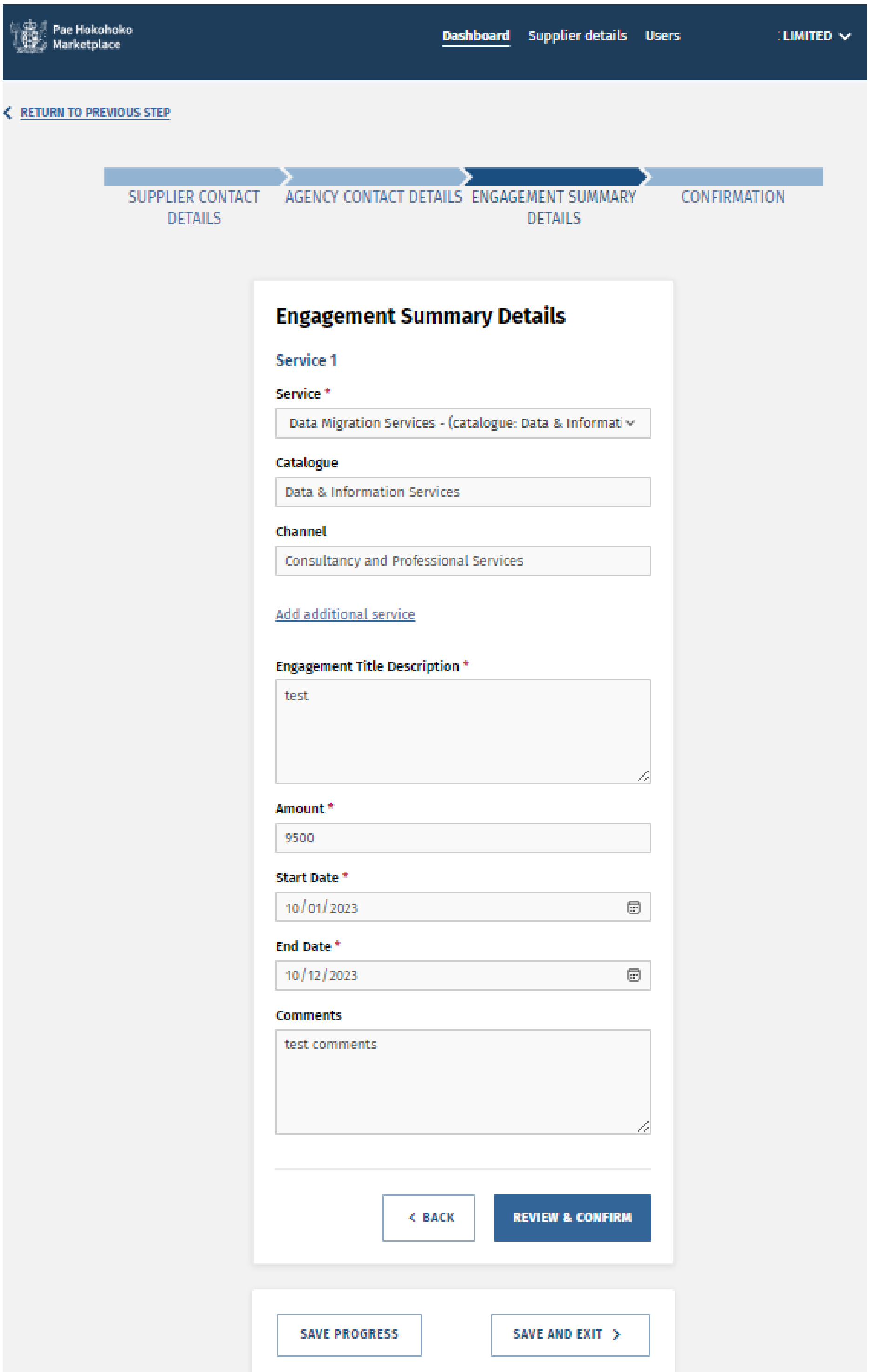
Fill in the required fields on the “Agency Contact Details” form and then click “CONTINUE.”
When an Agency Job Reference/Purchase Order has been selected, the “SOW Reference Number” will become optional.



- **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.



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

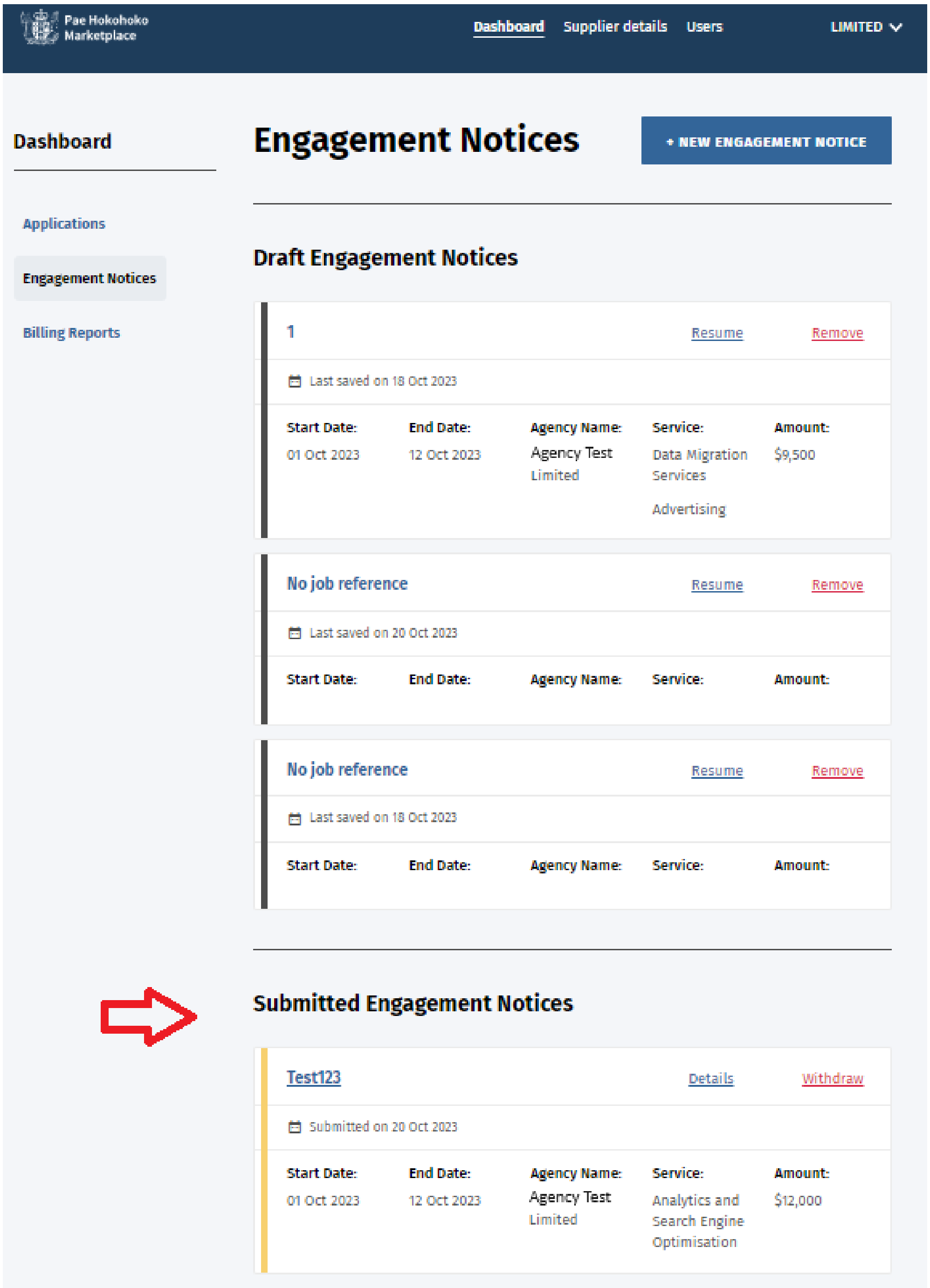
Comments
test comments

< BACK

SUBMIT

➢ **Submitted Engagement Notices**

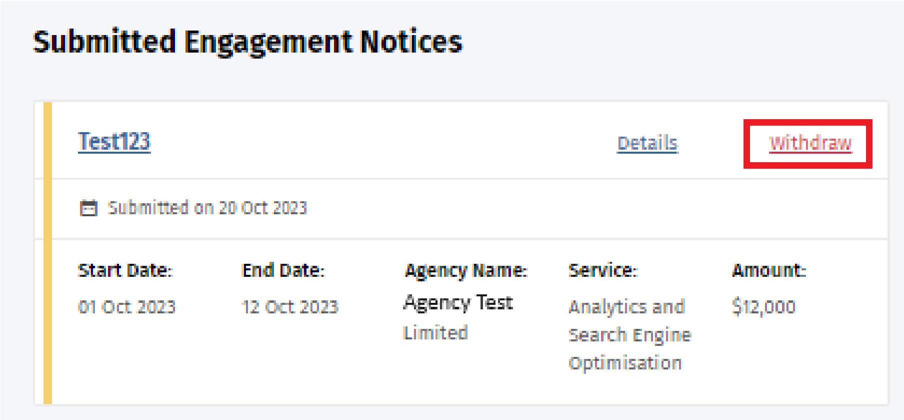
Submitted Engagement Notice's will appear under "Submitted Engagement Notices" on the "Engagement Notices" home page.



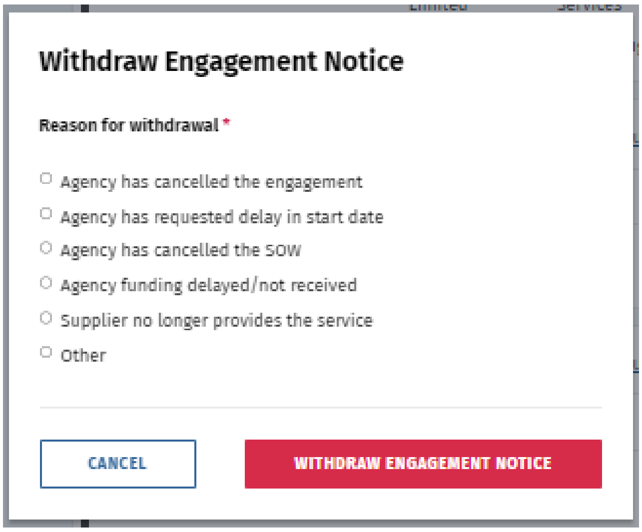
1.2 How to withdraw an engagement notice

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.



Select a reason for withdrawing then click “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.

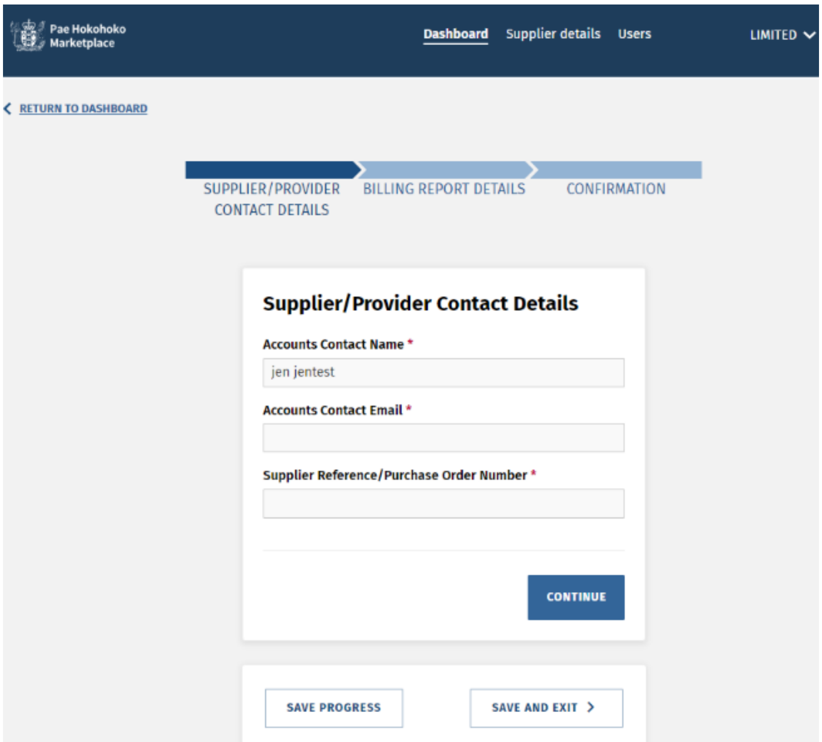
2 Billing Reports

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.”



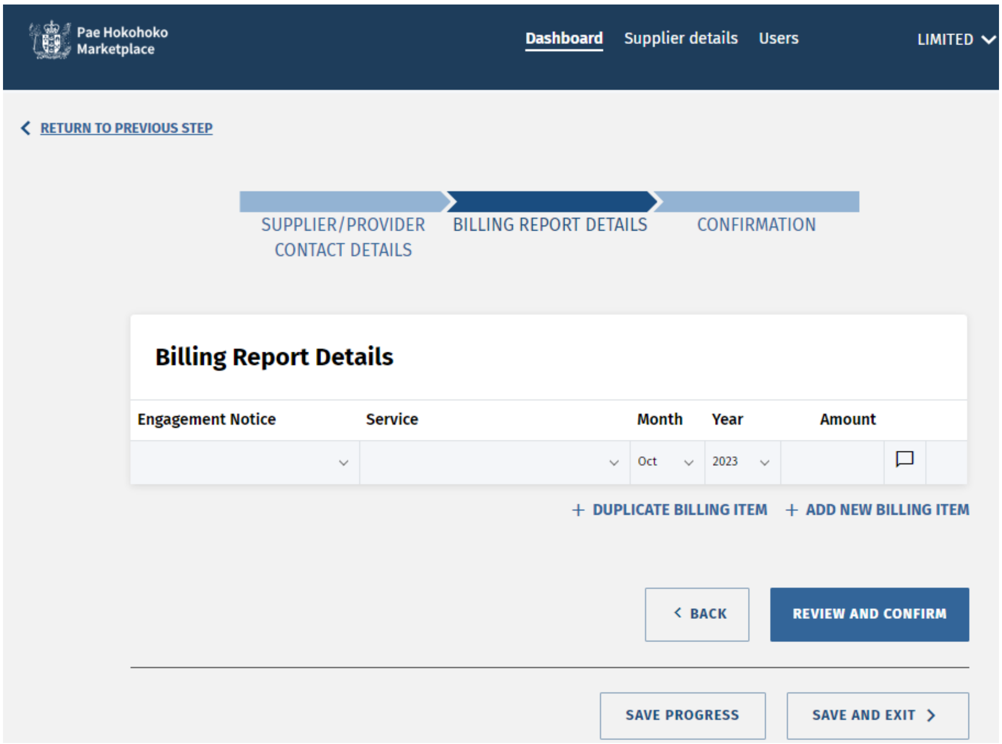
Note:

1. *Account Contact Name:*
Provide the relevant key contact name for DIA to quote in the Marketplace Lead Agency invoice description.

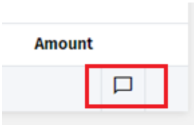
2. *Accounts Contact Email:*
Provide your preferred email address where you would like to receive the invoice.

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.

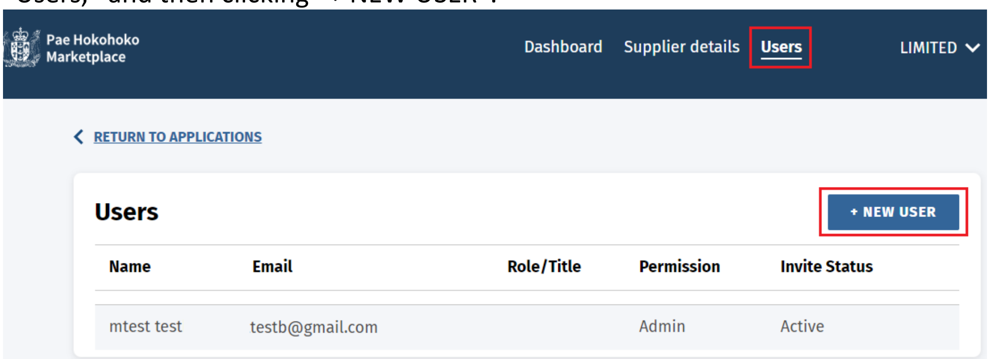
3 Engagement Notice and Billing Report Reminders

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

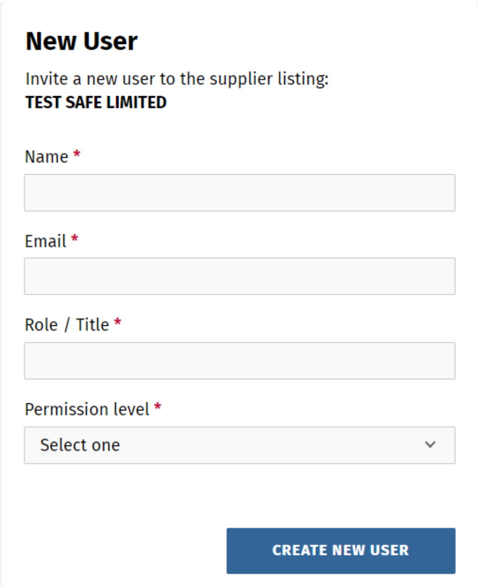
4.1 How to give a new user access

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.



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.