# Marketplace Engagement Notice and Billing Report Guide v2.1

## Contents

## Version History

| Version | Date | Description |
| --- | --- | --- |
| 1.0 | 2020 | Original release. |
| 2.0 | 26/8/2025 | Major update including new Billing Report feature for submitting bulk billing items, enhancements to user access and contact roles and updated Engagement Notice processes. |
| 2.1 | 28/11/2025 | Minor updates include additions of search and sort functions and card summary views to Billing Report feature. |

## Purpose

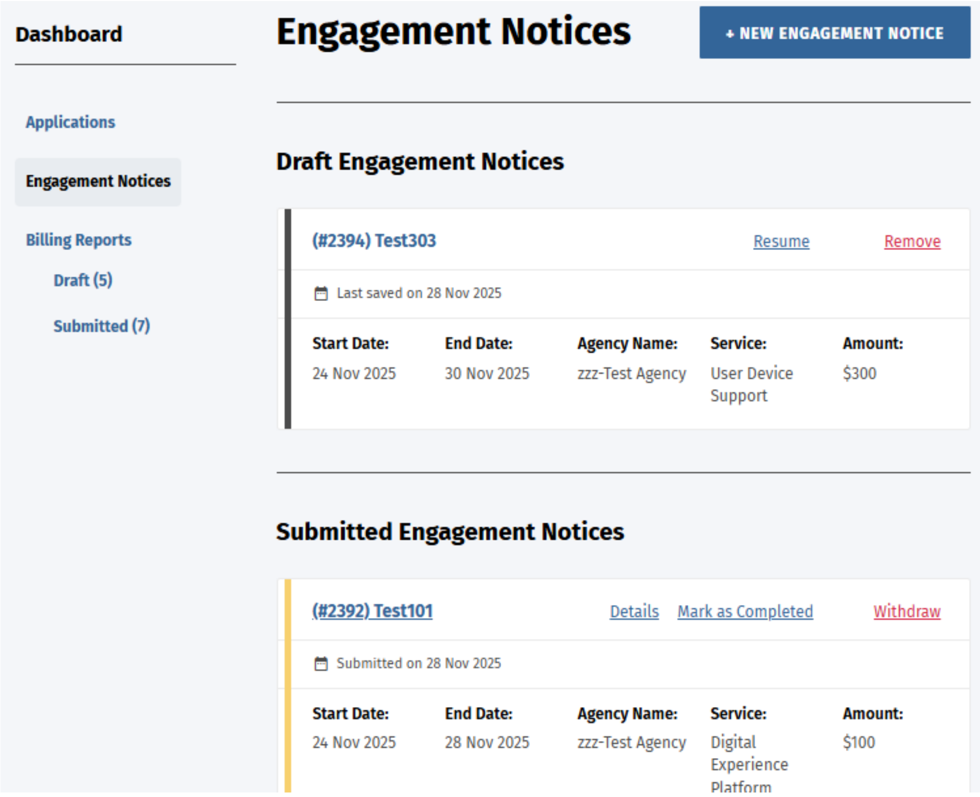
This guide provides suppliers with step-by-step instructions for managing engagement notices and submitting quarterly billing reports through the Marketplace dashboard. It outlines recent enhancements - including the new billing report feature, updates to user access and contact roles, and improvements to engagement notice workflows - to support accurate reporting, streamlined communication, and self-management of supplier account details.

# 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.

On the Marketplace dashboard, you'll find three sections:

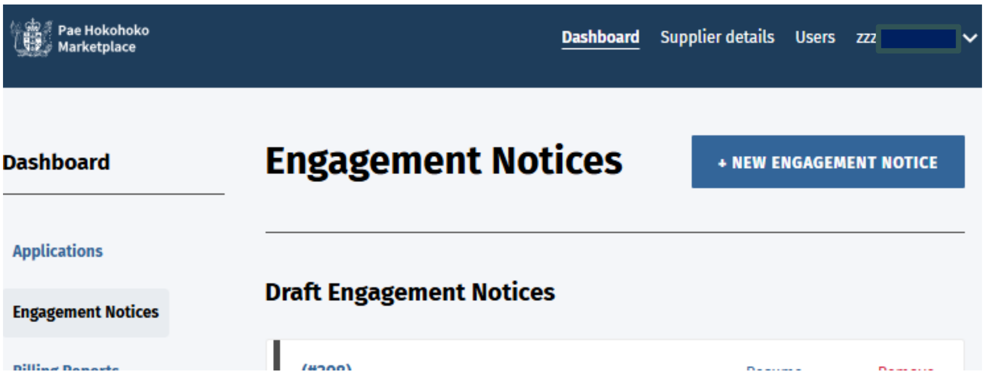
- **Draft Engagement Notices** - notices in progress, not yet submitted.
- **Submitted Engagement Notices** - notices that have been finalised and sent to the Marketplace team.
- **Completed Engagement Notices** – submitted notices where the engagement has concluded and the notice can be marked as completed. This will remove it from future billing reports.





# Create a new Engagement Notice

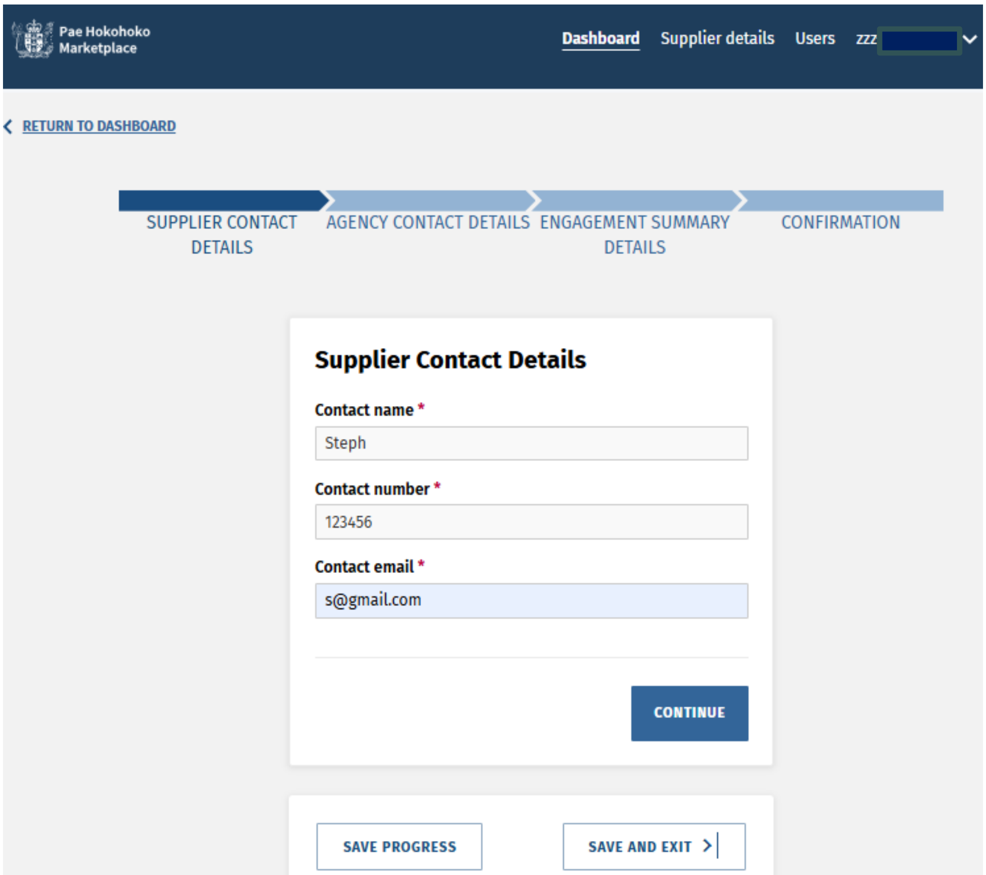
1. On the dashboard, navigate to 'Engagement Notices' and click button '+ NEW ENGAGEMENT NOTICE'




## Provide Supplier Contact Details

On this page, you'll select the **Supplier Contact** for the engagement notice. This person may be contacted by the Marketplace team if any clarification or follow-up is needed regarding the engagement.

1. Complete the page and click button 'CONTINUE'.




## Provide Agency Contact Details

On this page, you'll select the **agency** from a dropdown list. All listed agencies are registered on Marketplace and available for engagement.

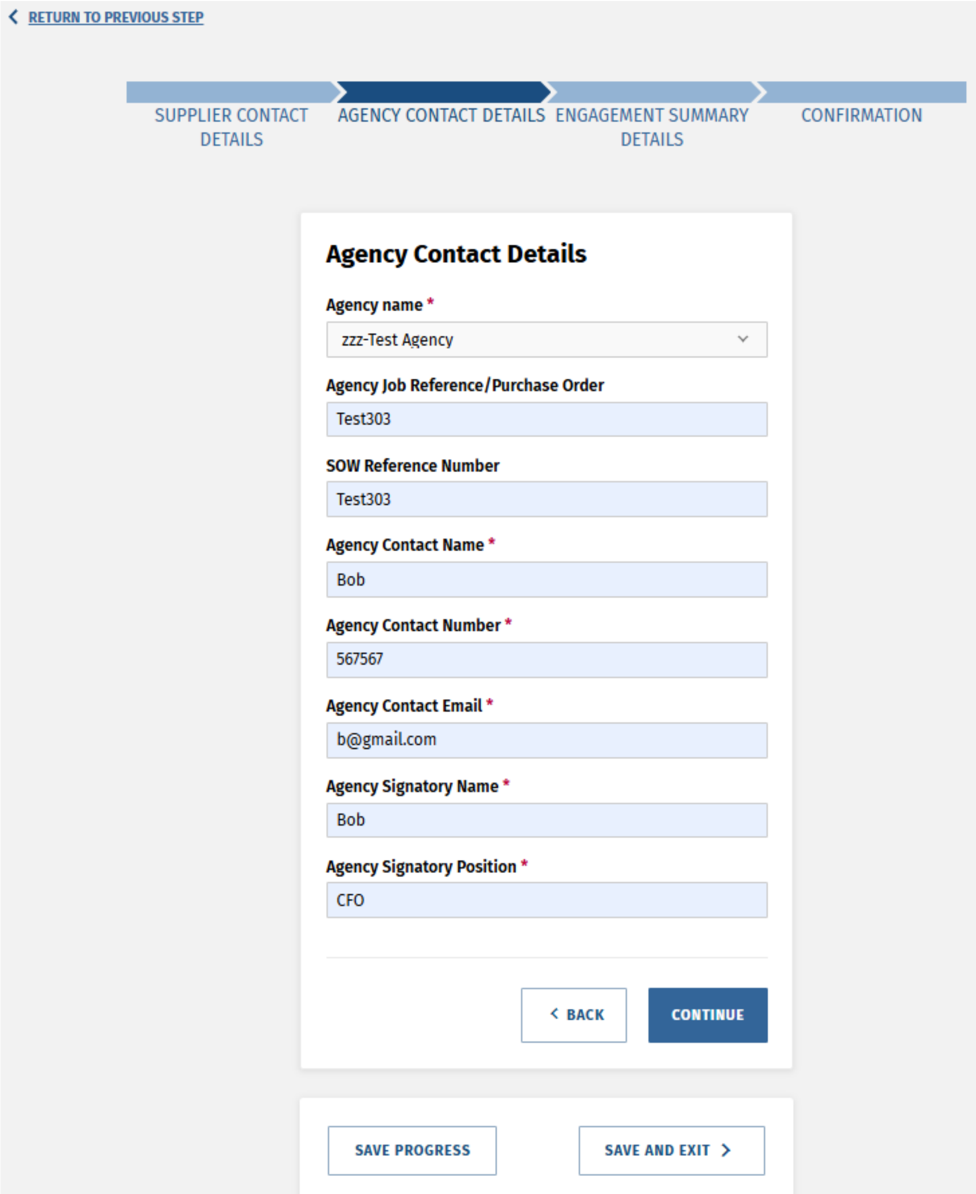
You'll also enter the **Agency Job Reference** (typically a purchase order number). This reference is critical - it links the engagement notice to the corresponding billing report and helps identify the engagement across the system.

Once the engagement notice is submitted:

- The system generates a unique Engagement Notice ID, which is concatenated with the Agency Job Reference.
- The format is: (#nnn) [Agency Job Reference]
  *(e.g., (#123) WCCP01*

This combined reference is used throughout the dashboard and in email communications to identify the engagement notice. It ensures consistency between the engagement notice and billing report, as the selected agency and service also automatically determine the associated catalogue and channel.

1. Complete the page and click button 'CONTINUE'.




## Complete Engagement Details

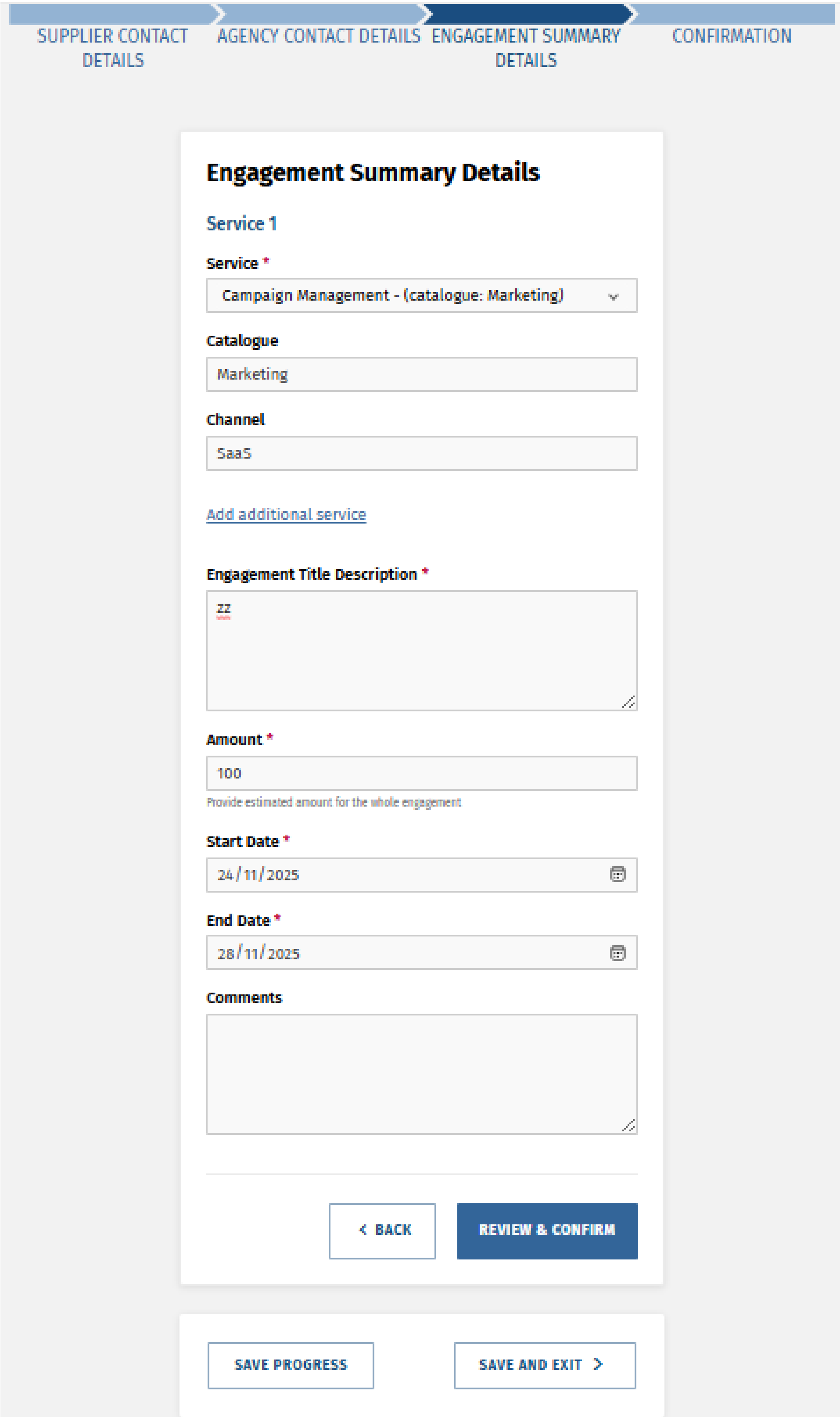
On this page, you'll select the **service** being delivered under the engagement. Once selected, the system will automatically populate the corresponding catalogue and channel, ensuring consistency across reporting.

You can add multiple services under a single engagement notice.

You'll also need to complete:

- An engagement estimate.
- The expected start and end dates of the engagement.

1. Complete the page and click button 'CONTINUE'.

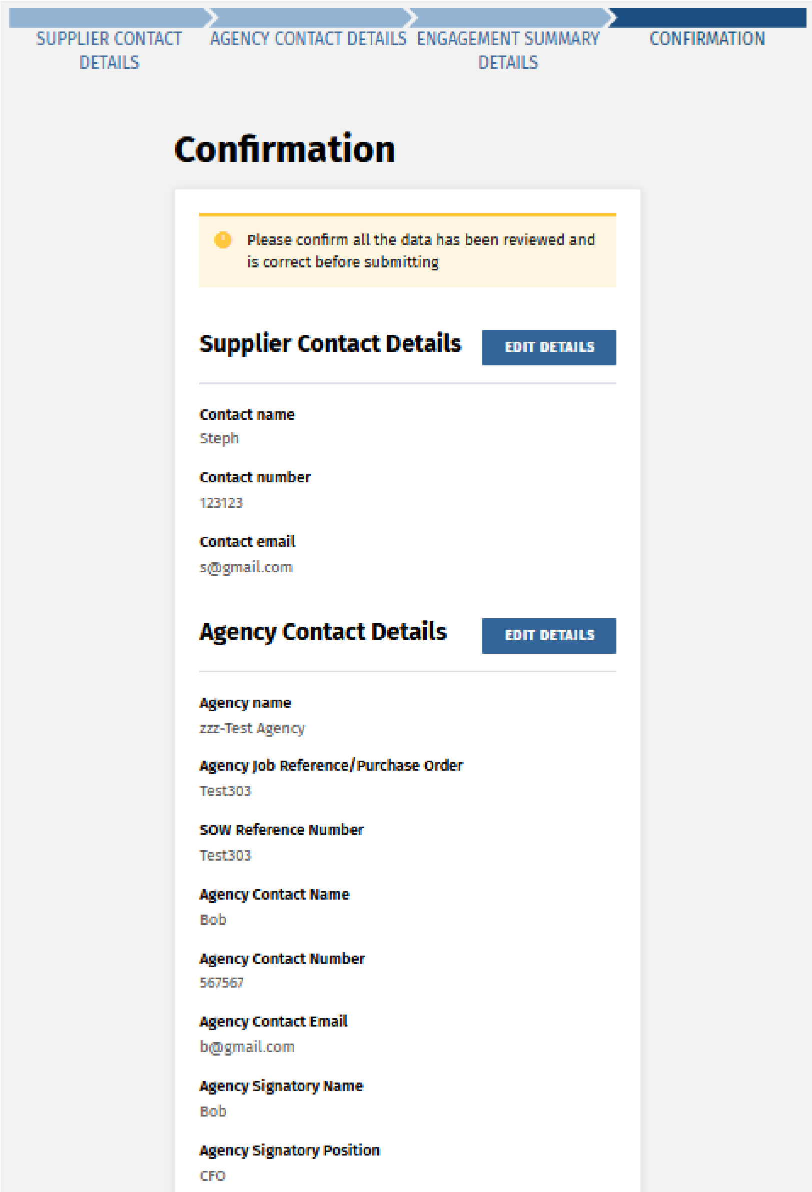


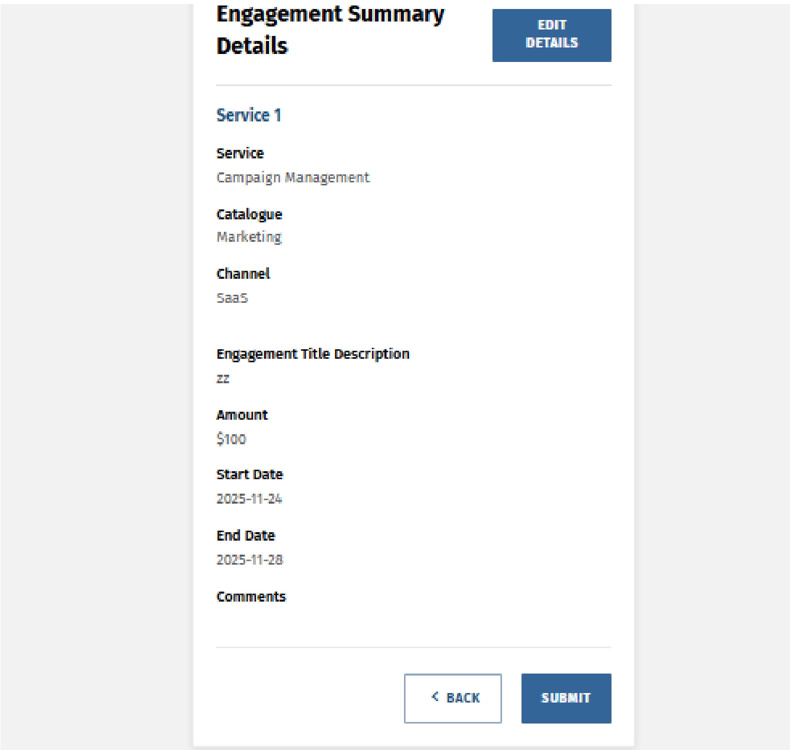

## Review, Confirm & Submit

The final page is to **review and submit** your entered engagement details.

1. Review the listed engagement notice details and use the 'Edit' functions as needed.
2. Click button 'SUBMIT'.

   The finalised engagement notice is displayed in your 'Submitted Engagement Notices' section on your dashboard.


SUPPLIER CONTACT DETAILS
AGENCY CONTACT DETAILS
ENGAGEMENT SUMMARY DETAILS
CONFIRMATION
Confirmation
Please confirm all the data has been reviewed and is correct before submitting
Supplier Contact Details
EDIT DETAILS
Contact name
Steph
Contact number
123123
Contact email
s@gmail.com
Agency Contact Details
EDIT DETAILS
Agency name
zzz-Test Agency
Agency Job Reference/Purchase Order
Test303
SOW Reference Number
Test303
Agency Contact Name
Bob
Agency Contact Number
567567
Agency Contact Email
b@gmail.com
Agency Signatory Name
Bob
Agency Signatory Position
CFO

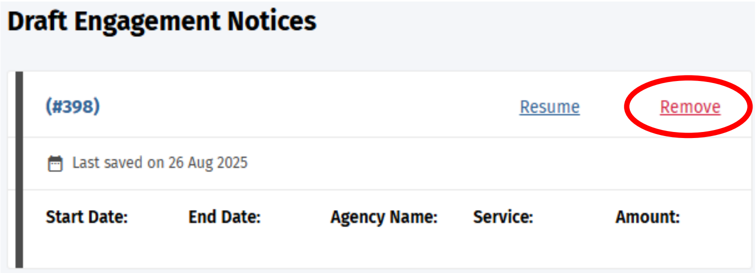

Engagement Summary Details
EDIT DETAILS
Service 1
Service
Campaign Management
Catalogue
Marketing
Channel
SaaS
Engagement Title Description
zz
Amount
$100
Start Date
2025-11-24
End Date
2025-11-28
Comments
BACK
SUBMIT

# Change status of Engagement Notice

Suppliers can manage the status of their engagement notices at different stages. Here's how each status works:

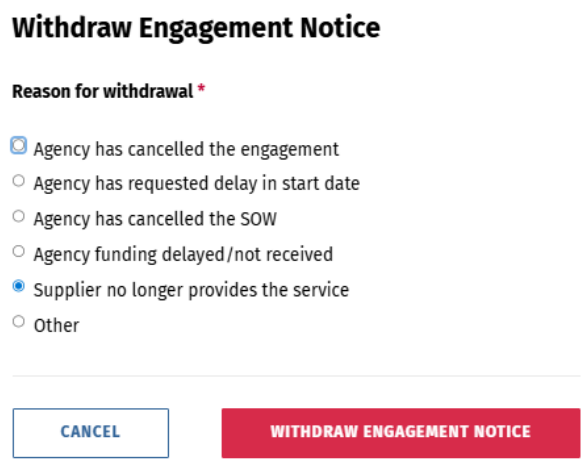
## Draft Engagement Notices

- You can remove a draft engagement notice if it's no longer needed.
- Deleted drafts are permanently removed and cannot be recovered.
- Draft notices are not included in billing reports.




## Submitted Engagement Notices

- You can withdraw a submitted engagement notice by providing a withdrawal reason.
- A withdrawn engagement notice can be reverted to submitted by the Marketplace Support Services team if needed.
- Submitted engagement notices can also be reverted to draft by the Marketplace Support Services team to allow further editing.
- Submitted engagement notices are included in billing reports.




## Completed Engagement Notices

- You can mark an engagement notice as completed once the engagement work is finished.
- Completed notices are excluded from billing reports.
- If the engagement is ongoing, you can toggle it back to “Not Completed”, which returns it to the submitted status.
- You can invoke the withdraw function of completed engagement notice but it will have to be moved back to the submitted section to follow through with a withdrawal.


## Contact Marketplace Support Services Team

If you need assistance with engagement notices - such as reverting a submitted or withdrawn notice back to draft, please contact the Marketplace Support Services team: invoicing@dia.govt.nz

When making a request:

- Quote the relevant Engagement Notice reference. This is the concatenated system generated unique engagement notice ID and your ‘Agency Job Reference / Purchase Order’ reference, to help identify the engagement notice.

  The format is: (#nnn) [Agency Job Reference/Purchase Order]
  *(e.g., (#123) WCCP01*

- The team will update the status as needed and send a direct link to the engagement notice. Clicking the link will take you to the updated version, ready for review or editing.

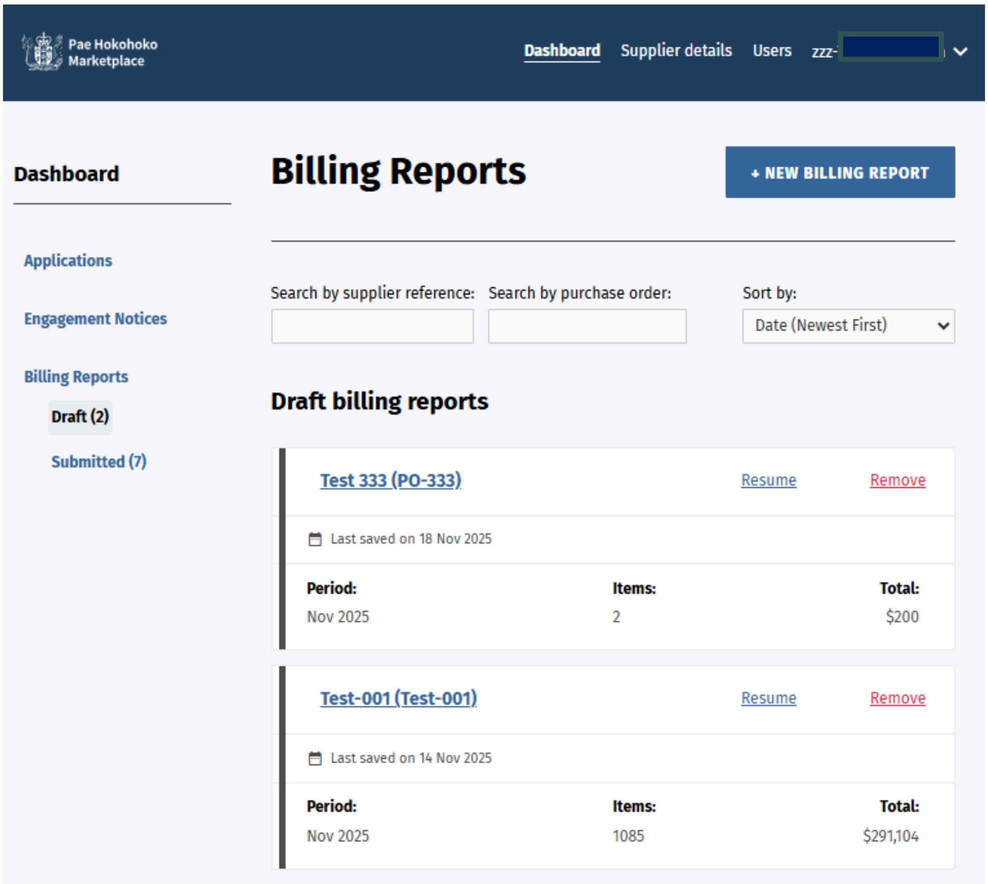
# Billing Reports

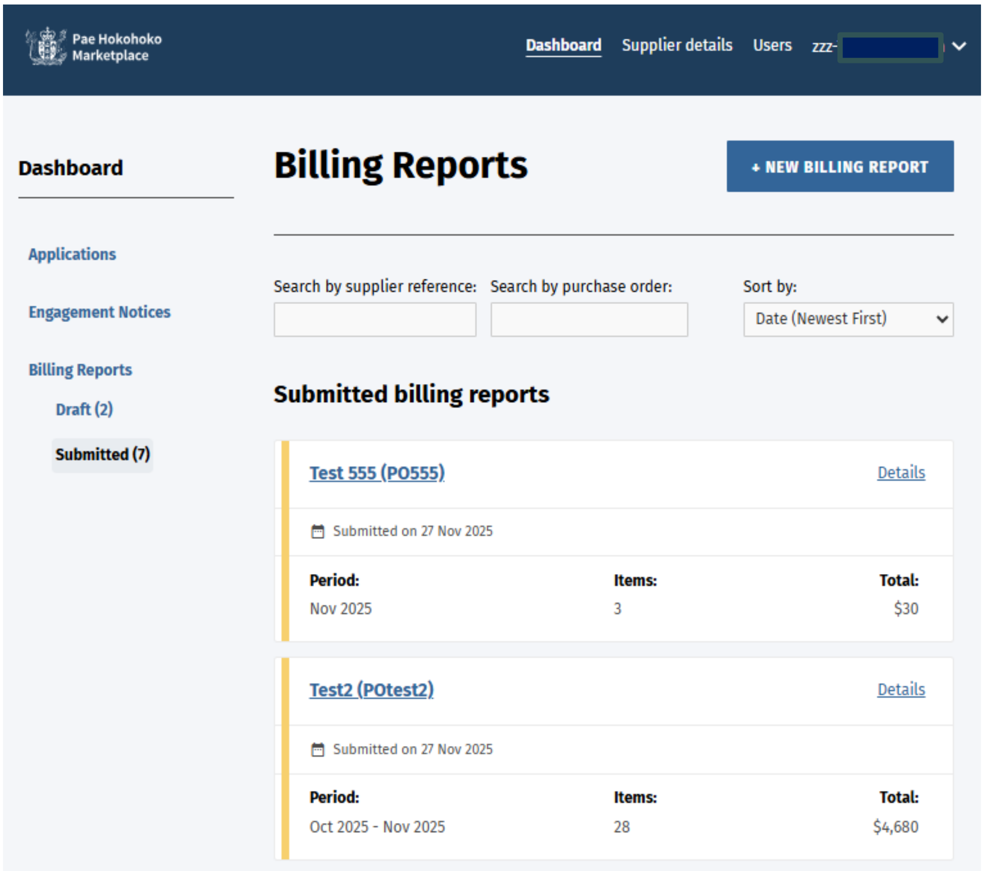
Billing reports need to be submitted quarterly by suppliers to provide agency total consumption of services delivered under Marketplace engagement notices. This information is used to calculate the applicable Lead Agency Fee, which the supplier will be invoiced for.

On the Marketplace dashboard, you'll find two sections:

- **Draft Billing Reports** – a summary view of reports in progress, not yet submitted.
- **Submitted Billing Reports** – a summary view of reports that have been finalised and sent to the Marketplace team.

1. To open a draft billing report, click on the summary card link 'Resume'.
2. To open a submitted billing report, click on the summary card link 'Details'.






## Search and Sort on Billing Reports

On the Billing Reports dashboard, you can search and sort billing reports.

1. Search by supplier reference or by purchase order.
2. Sort by ascending or descending date or supplier reference.

## Create a new Billing Report

1. On the dashboard, navigate to ‘Billing Reports’ and click button ‘+ NEW BILLING REPORT’


### Provide Accounts Contact Details

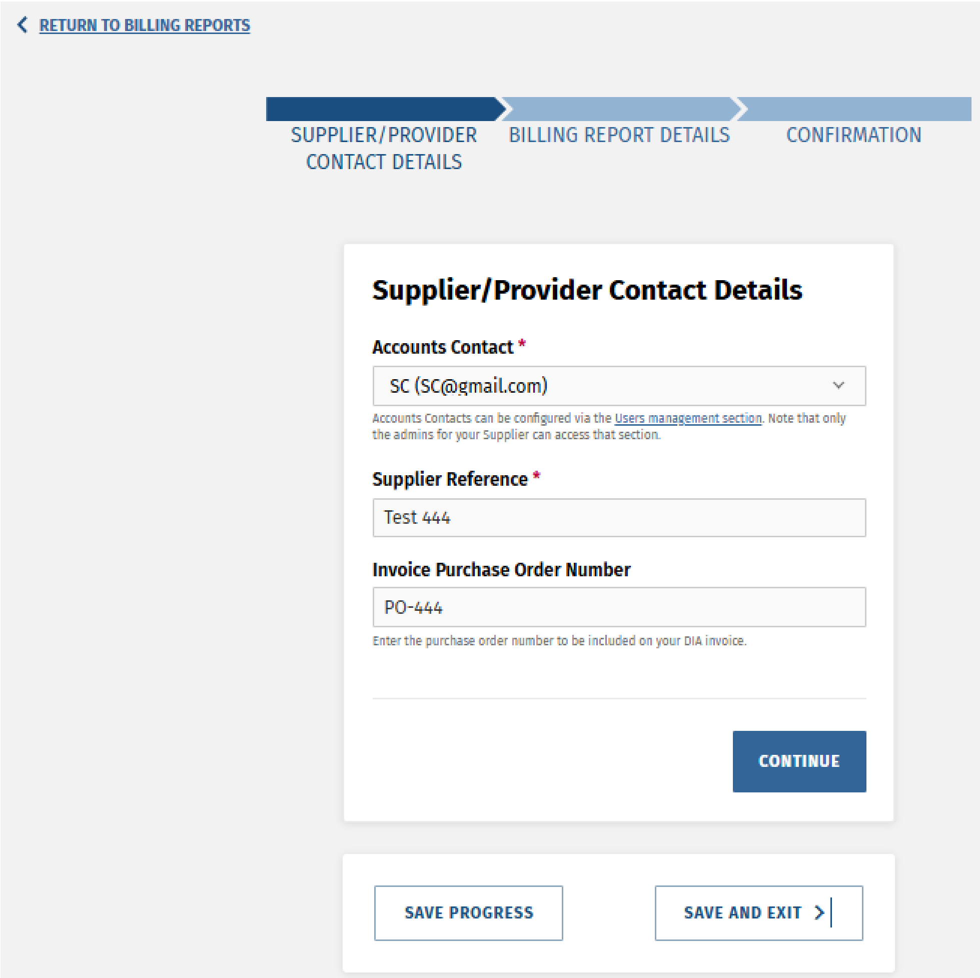
On this page, you’ll select the **Accounts Contact** for this billing report. This person will receive all related communications for this billing report.

1. Use the dropdown to select from existing users that have been recorded in the dashboard Users section as "Accounts Contact" or "Admin".

   If no Accounts Contact is recorded, then the Admin will be the default recipient.

2. If the correct contact isn't listed, click the link 'Users management section' and add a new user into the Users table with the "Accounts Contact" role. Return to the billing report.

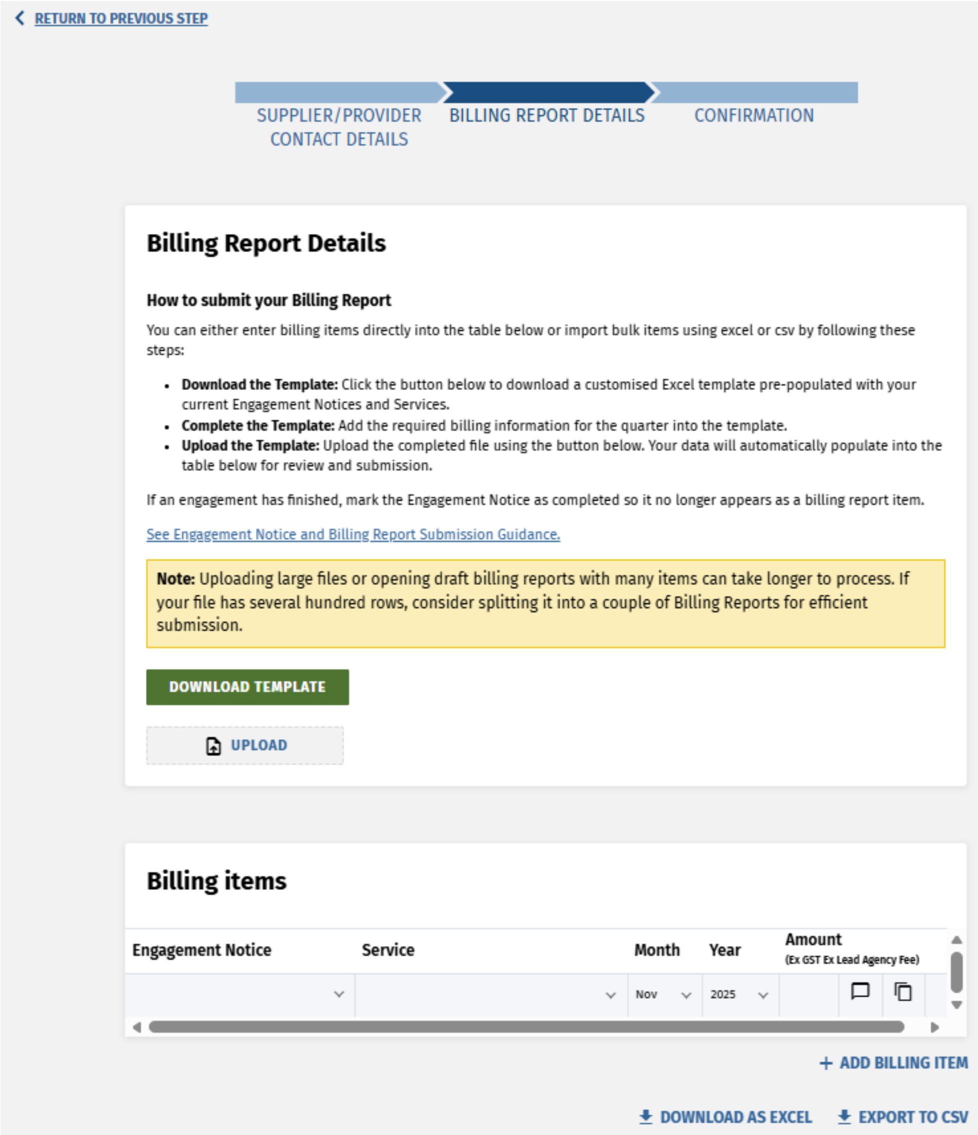
3. Complete the remaining fields and click button 'CONTINUE'.




## Complete Billing Report Details

This is the main section where you enter billing data. You have two options

- **Direct entry** to add and edit billing items into the Billing items table.
- **Download Template** for bulk importing of billing items using a downloadable Excel template.




### *Download the Template:*

1. Click button ‘DOWNLOAD TEMPLATE’.

   The spreadsheet will be pre-filled with your current engagement notices and services. Each row represents a unique combination of engagement notice and service. **If an engagement has concluded, mark the Engagement Notice as ‘Completed’ in the Engagement Notices section of your dashboard. This will remove it from future billing reports.**

### *Complete the Excel Template:*

1. Review the instructions tab on the template.

2. Complete the template. You can:

   - Duplicate rows for additional or recurring billing.

   - Edit date, amounts and comments.

   - Delete rows you don’t need.

### *Validation Rules:*

- Do not edit or delete Engagement Notice or Service (catalogue) fields.

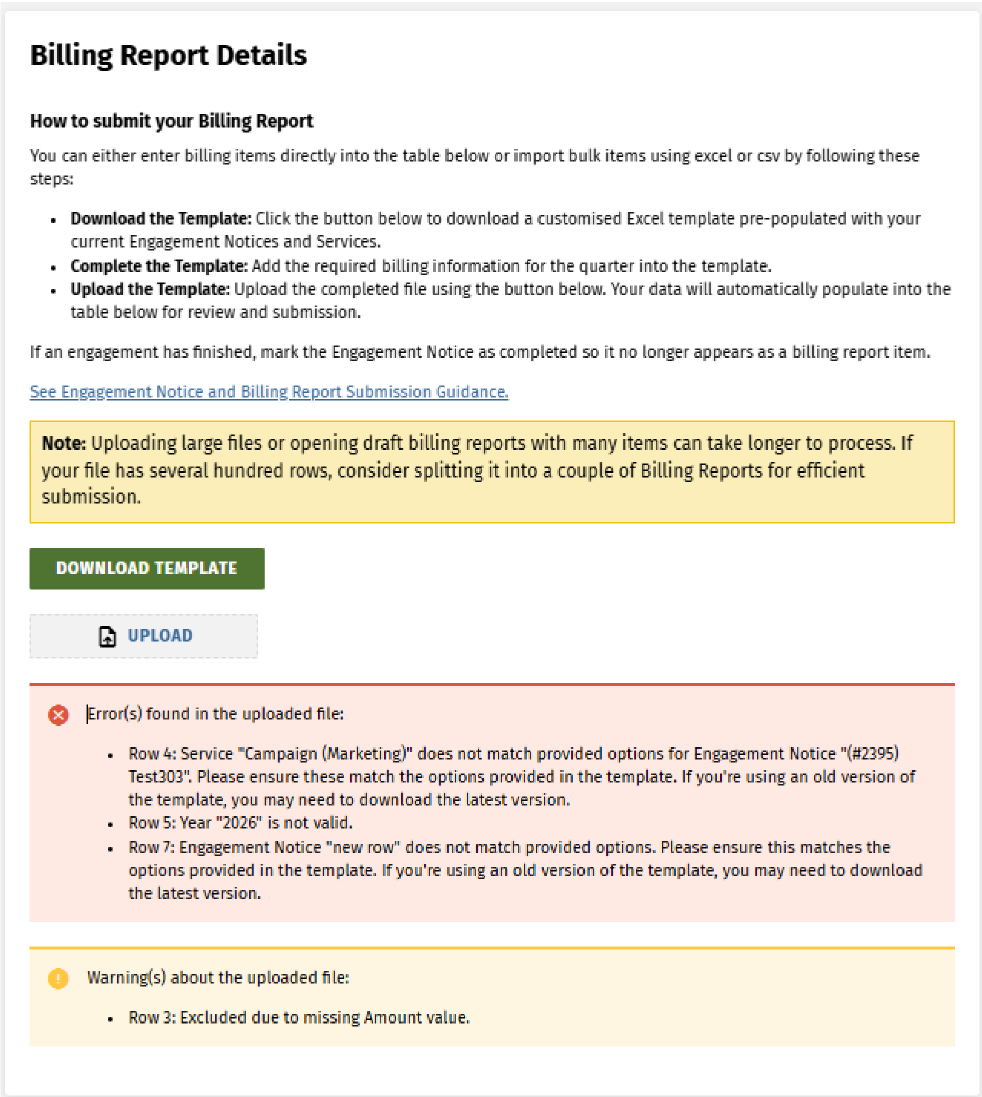
- Do not use future dates or years before 2000.
- Do not enter free text rows.
- Missing amounts will be treated as deleted rows.
- You may add columns or delete the agency name, and they won't affect processing.

### *Upload the Template:*

1. Click button 'UPLOAD'.
2. Choose to Append (add to existing table) or Overwrite (replace current table).
3. Click button 'PROCESS UPLOADED DATA'.

   Errors will be flagged with row numbers and descriptions.

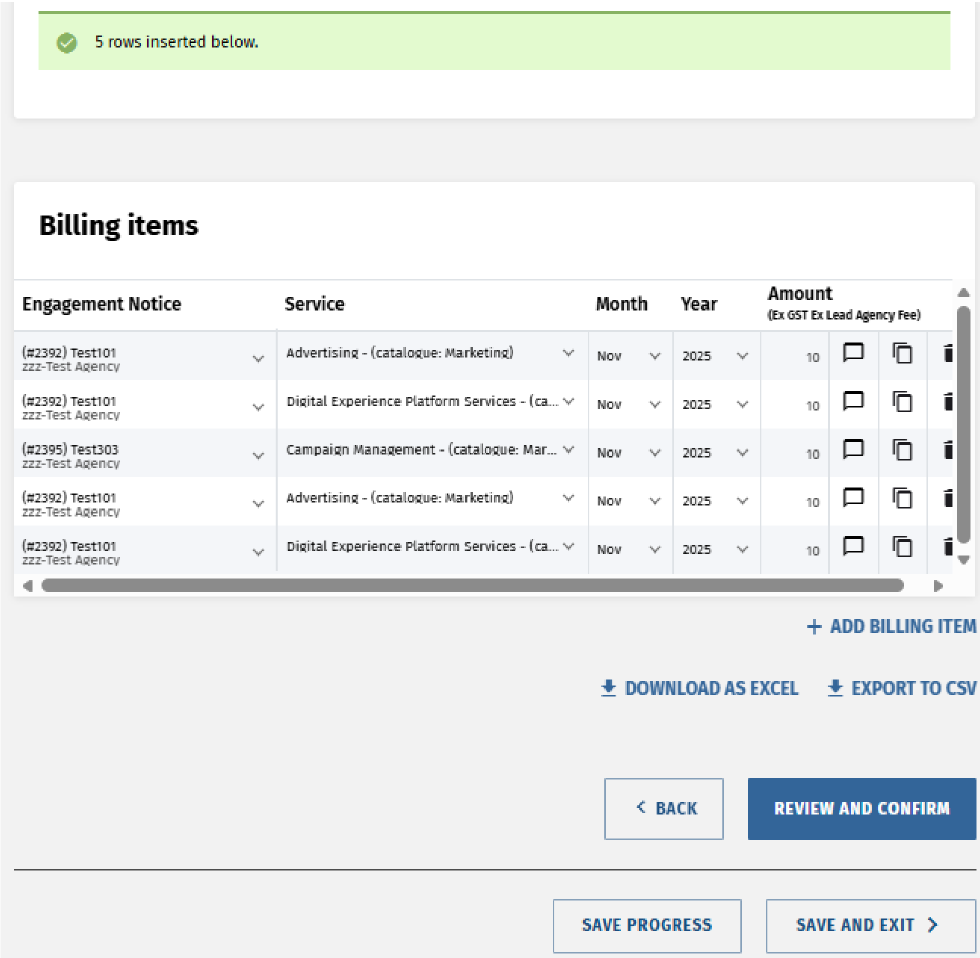
4. You must fix errors in the spreadsheet and reupload*. (*Some date errors can be fixed in the dashboard table instead.)



The errors displayed above correspond to the errors made in the template below:

| | Engagement Notice | Agency | Service (Catalogue) | Month | Year (yyyy | Amount (Ex GST Ex Lead Agency Fe | Comment | new column |
|---|---|---|---|---|---|---|---|---|
| 2 | (#2392) Test101 | zzz-Test Agency | Advertising (Marketing) | Novembe | 2025 | 10 | | |
| 3 | (#2392) Test101 | zzz-Test Agency | Digital Experience Platform Services (Digital Experien | Novembe | 2025 | | | |
| 4 | (#2395) Test303 | zzz-Test Agency | Campaign (Marketing) | Novembe | 2025 | 10 | | |
| 5 | (#2392) Test101 | zzz-Test Agency | Advertising (Marketing) | Novembe | 2026 | 10 | | |
| 6 | (#2392) Test101 | zzz-Test Agency | Digital Experience Platform Services (Digital Experien | Novembe | 2025 | 10 | | |
| 7 | new row | | service 1 | Novembe | 2025 | 10 | | |

The successfully uploaded file is displayed in the Billing items table:




### *Add or Edit the Billing items directly in table:*

1. You can:

    - Add new billing items.
    - Click on the copy icon to duplicate rows.
    - Click on the rubbish bin icon to delete rows.
    - Click on the comment icon to add comments.
    - Edit date, amounts and comments.

### *Download the Billing items table as Excel:*

Once you've populated your billing items table, you can download it as excel using the same template format as the original spreadsheet.

1. Click the button 'DOWNLOAD AS EXCEL' to export the current table.
2. You can:
    - Continue editing the billing data in Excel using the same validation rules.
    - Reupload it to the dashboard Billing items table – choose to overwrite it or append new rows.

### *Export the Billing items table to CSV:*

Use the Export to CSV function to save a copy of the final table for your records.

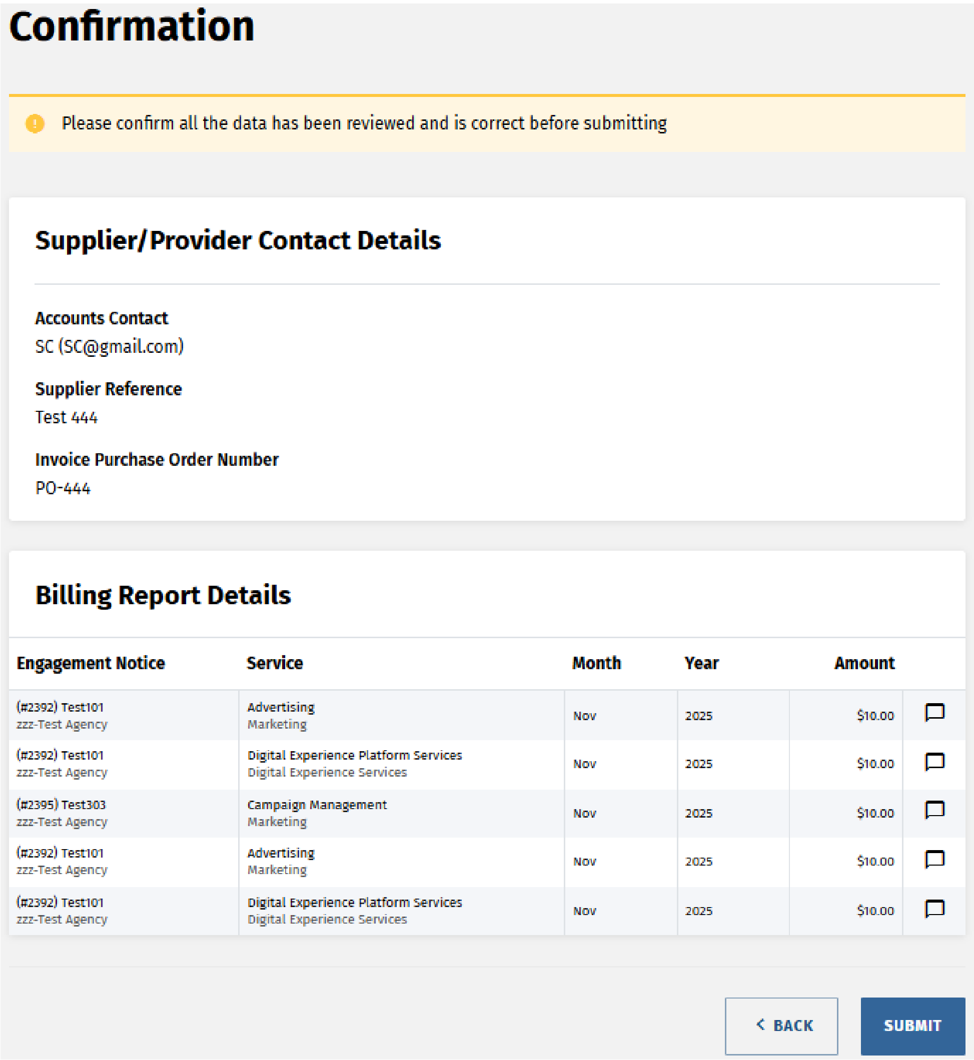
1. Click the button 'EXPORT TO CSV' to export the current table and save as your own record.

## Review, Confirm & Submit

Only data in the dashboard Billing items table is submitted. **The spreadsheet is a tool for entry, not the submission itself.**

1. Review the Billing items table.
2. Click button 'REVIEW AND CONFIRM' and ensure all data is correct.
3. Click button 'SUBMIT'.

   The finalised report is displayed in your 'Submitted billing reports' section on your dashboard.



# Confirmation

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

**Supplier/Provider Contact Details**

**Accounts Contact**
SC (SC@gmail.com)

**Supplier Reference**
Test 444

**Invoice Purchase Order Number**
PO-444

**Billing Report Details**

| Engagement Notice | Service | Month | Year | Amount | |
|---|---|---|---|---|---|
| (#2392) Test101 zzz-Test Agency | Advertising Marketing | Nov | 2025 | $10.00 | |
| (#2392) Test101 zzz-Test Agency | Digital Experience Platform Services Digital Experience Services | Nov | 2025 | $10.00 | |
| (#2395) Test303 zzz-Test Agency | Campaign Management Marketing | Nov | 2025 | $10.00 | |
| (#2392) Test101 zzz-Test Agency | Advertising Marketing | Nov | 2025 | $10.00 | |
| (#2392) Test101 zzz-Test Agency | Digital Experience Platform Services Digital Experience Services | Nov | 2025 | $10.00 | |

< BACK SUBMIT

# Engagement & Billing Report Reminders

Each quarter, on the 20th of March, June, September, and December, suppliers receive a reminder email to complete their engagement notices and submit their quarterly billing report.

These reminders are sent to:

- All listed Accounts Contacts for the registered supplier.
- The first Admin user of the registered supplier, if no Accounts Contact is provided.

Suppliers are responsible for keeping their Accounts Contact details up to date in the dashboard. This ensures reminders are sent to the correct and current recipients, improving communication accuracy.

If your organisation had no engagements with agencies during the quarter, the email instructs to simply reply to the reminder email with:

> *"No engagements this quarter."*

If your application for services is still pending approval or your Service Listings are not yet published on the agency-facing portal, you can ignore the reminder until you begin engaging with agencies via Marketplace.

# User Access

Marketplace suppliers can self-manage their user details and dashboard access through the Users table in the dashboard. This includes reviewing and updating contact roles, such as CISO, Security Contacts, and Accounts Contacts, and assigning dashboard permissions where needed.

Dashboard Access and Authentication

- Dashboard access requires authentication via the Marketplace login system.
- At the time of supplier registration, the first Admin user is recorded and granted dashboard access once authenticated.
- Only users with Admin access can maintain the Users table, including adding or updating contact roles and permissions.
- Users with dashboard access (Admin or Dashboard User) must be authenticated before they can access the dashboard. They can also be assigned any of the other contact type roles.

Keeping contact roles accurate ensures the right people receive the correct communications and have access to perform necessary actions in the portal.

## User Roles and Contact Types

### Admin

- Has dashboard access once authenticated and can be assigned additional contact type roles.

- Can manage all users and contact roles within the supplier account.
- Can manage and process all dashboard features – Applications, Engagement Notices, Billing Reports, Supplier and User details.

## User

- Has dashboard access once authenticated and can be assigned additional contact type roles
- Can manage and process dashboard features – Applications, Engagement Notices and Billing Reports.

## Contact type - CISO (Chief Information Security Officer)

- Mandatory: Only one CISO. Each supplier must have one user recorded as the CISO.
- Used for security-related communications.
- May or may not have dashboard access.

## Contact type - Security Contact

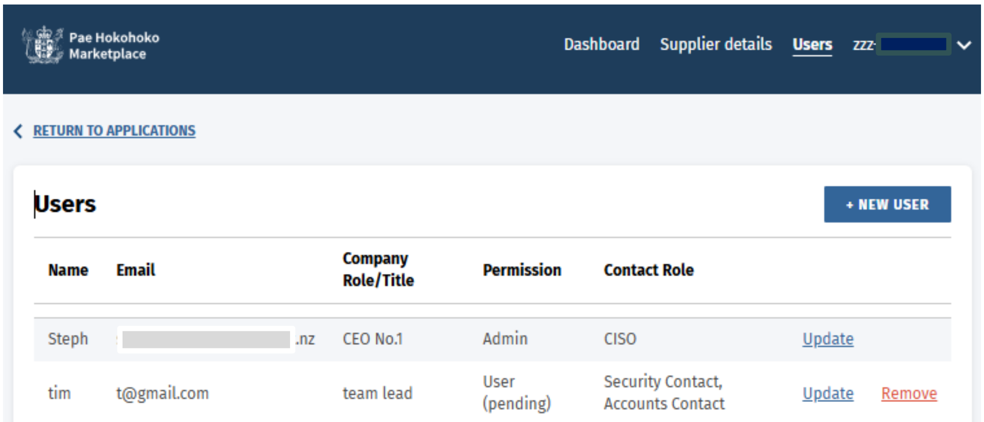
- Optional: Multiple users can be assigned.
- Used for security and operational communications.
- May or may not have dashboard access.

## Contact type - Accounts Contact

- Optional: Multiple users can be assigned.
- Used for billing report reminder emails and other billing-related communications.
- May or may not have dashboard access.

# Admin Add User

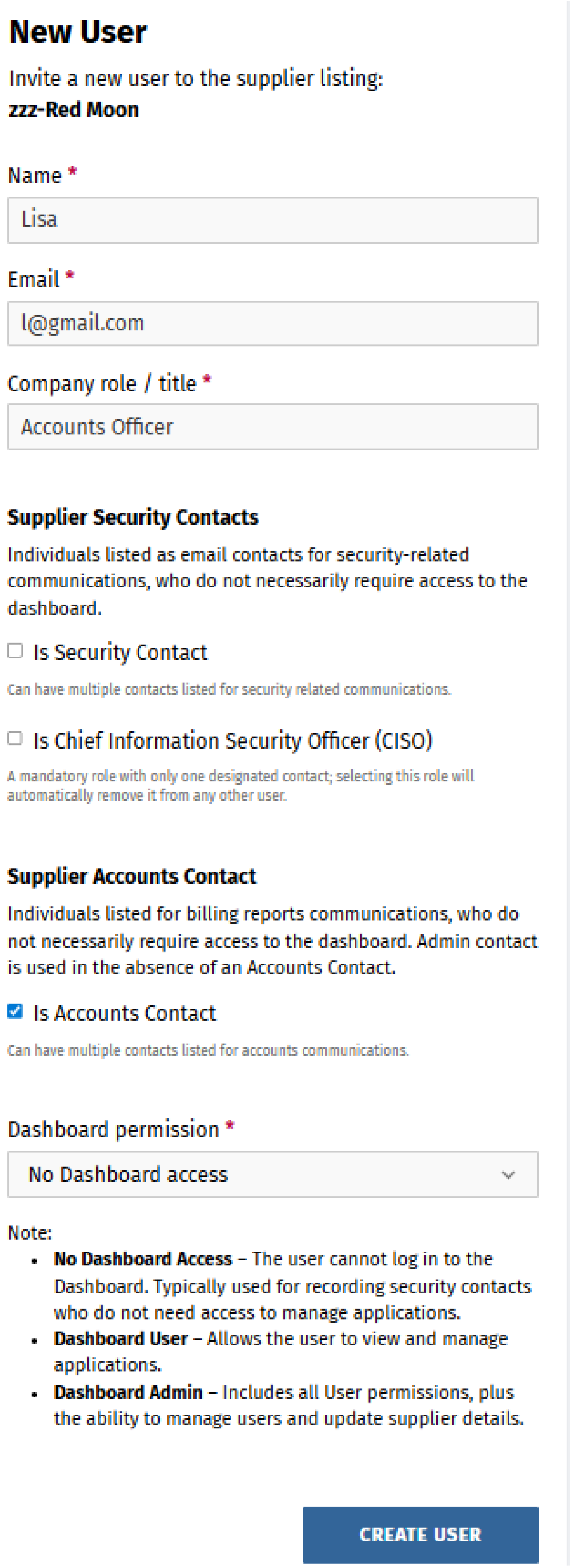
1. On the dashboard, navigate to 'Users' and click button '+ NEW USER'.



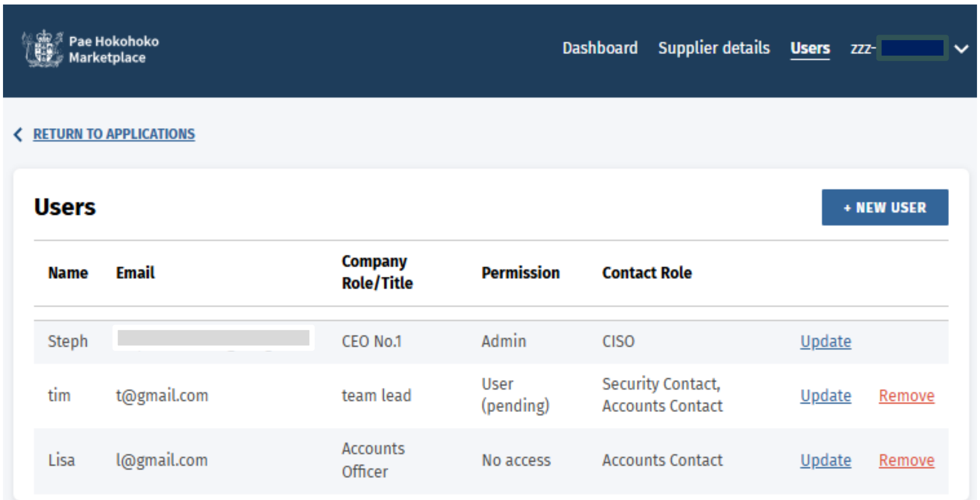
*Validation Rules:*

- Can add a user with permission – Dashboard Admin or Dashboard User, with or without another contact type role.
- Can add a user as a contact type role with permission – No Dashboard access.
- Can add a user as a contact type role with permission - Dashboard Admin or Dashboard User.
- Can NOT add a user with permission – No Dashboard access AND not a contact type role.
- Can NOT remove a user with a CISO role. The role must be changed to another user first.
- Can NOT add a CISO role to more than one user.
- Can NOT remove an exclusive active Admin.

2. Complete the form and click button 'CREATE USER'.




The new user is added to the Users table on the dashboard.


Pae Hokohoko Marketplace
Dashboard
Supplier details
Users
zzz-[redacted]
RETURN TO APPLICATIONS
Users
+ NEW USER
Name
Email
Company Role/Title
Permission
Contact Role
Steph
CEO No.1
Admin
CISO
Update
tim
t@gmail.com
team lead
User (pending)
Security Contact, Accounts Contact
Update
Remove
Lisa
l@gmail.com
Accounts Officer
No access
Accounts Contact
Update
Remove

**END**