





e-Invoicing Communication Toolkit

Getting your suppliers ready for e-Invoicing

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How to use this toolkit

This communication toolkit aims to support businesses and government e-Invoicing implementation, specifically to aid in encouraging suppliers to get e-Invoicing capable and to begin sending e-Invoices to your organisation.

This toolkit includes communication tools you can adapt and use such as supplier analysis tips (segmentation and prioritisation), contact schedule options and sample emails.

You should start communicating with your suppliers before your technical implementation is completed. You'll need to allow enough time for your suppliers to be ready to send e-Invoices.

Communication resources

Here you will find:

- Segmentation options and considerations
- Contact schedule options
- Email templates to adapt and use to communicate and engage with your suppliers
- Helpful links and additional resources

Segmentation options

Analysis of your suppliers will help you identify and group suppliers to prioritise to persuade to send you e-Invoices. This analysis may also help you tailor the messages so they are relevant to that supplier's situation. There are many ways you could group or prioritise customers, e.g. based on:

- Those that are already e-Invoicing (because they've advised you)
- Those with highest volumes of invoices.
- Those you can easily get started. They may be low volumes but may also be many of them. For example identify those that send you invoices from their software system using Xero or MYOB. **See appendix 1 for how to identify these in your Outlook inbox.** It's easy and quick for these suppliers to start e-Invoicing.
- Frequent invoicers
- Which method they use to provide you the invoice – paper, PDF via email, through an EDI
- Business size. For example, a larger organisation may take longer to implement e-Invoicing than a smaller business who uses software that's already e-Invoicing enabled. They will need longer lead in time.
- If you have an existing closed EDI solution you might want to exclude suppliers using this for the moment but think about a future transition process for those suppliers currently using the EDI channel.

Reaching the right people in your supplier's organisation

You'll want to reach: accounts receivable and payable teams, office managers, CFOs, financial systems managers, procurement and ICT leads.

As well as employing your supplier relationship/contract managers to spread the word about e-Invoicing, they may also help get the contact details (i.e. email address) of the right person to reach with e-Invoicing communications.

Contact schedule options

Analysis of your suppliers may also help you determine your contact strategy and schedule. Here are two options to consider.

Option one: Contact all (but still tailor messages by groups) – where you have 3 timed communications

| Contact all but tailor for different supplier groups | | Pre go live | | | Go live | Post go live | | |
|--|---|-------------|-----------|-----------|---------|--------------|-----------|-----------|
| | | -8 months | -6 months | -2 months | | +1 month | +2 months | +3 months |
| Email 1 | Heads up, we'll be e-Invoicing by <month/year>. You can too - get ready | | | | | | | |
| Email 2 | From <go live date> we'll be accepting e-Invoices. | | | | | | | |
| Email 3 | We're now accepting e-Invoices, send your e-Invoices from now on. | | | | | | | |

Option two: Staggered approach – where you communicate based on your chosen priority groups.

| Staggered roll out = Priority groups (PG1, PG2, PG3) | | Pre go live | | | Go live | Post go live | | | | |
|--|--|-------------|-----------|-----------|---------|--------------|-----------|-----------|-----------|-----------|
| | | -8 months | -6 months | -2 months | | +1 month | +2 months | +3 months | +4 months | +5 months |
| Email 1 (ALL) | Heads up, we'll be e-Invoicing by <month/year>. You can too - get ready <to select few within PG1> We'd like to invite you to test e-Invoicing with us | PG1 | PG2 | PG3 | | | | | | |
| PG1 Email 2 | From <go live date> we'll be accepting your e-Invoices from now on | | | PG1 | | | | | | |
| PG1 Email 3 | We're now accepting e-Invoices, send your e-Invoices from now on | | | | PG1 | PG1 | | | | |
| PG2 Email 2 | We're now accepting e-Invoices, send your e-Invoices from now on | | | | | | PG2 | | | |
| PG2 Email 3 | Remember, we're now accepting e-Invoices | | | | | | | | PG2 | |
| PG3 Email 2 | We're now accepting e-Invoices, send your e-Invoices from now on | | | | | | | PG3 | | |
| PG3 Email 3 | Remember, we're now accepting e-Invoices | | | | | | | | | PG3 |

Email templates

To tailor or not tailor messages may depend on your supplier analysis and your supplier readiness approach. You may wish to include personalised and tailored messages based on:

- Knowing which suppliers send an email with a PDF invoice via their MYOB system
- Knowing which suppliers send an email with a PDF invoice via their Xero system
- Knowing which suppliers send paper invoices (in the post) and/or send very few a year (offer free portal option)
- Estimated size of business –i.e. medium to large are likely to be using different technology for their accounts receivable and/or have more complex systems. The steps to get started are slightly different.

Tailored messages are highlighted in each of the email templates and you can choose to use them or simply delete.

| Email version | Short description | When to send |
|---------------|---|--|
| 1 | Advising your intentions to be able to receive e-Invoices. | Depends on your targeting/segmentation approach. Typically 6 – 8 months out |
| 2 | Advising your specific date that you can receive e-Invoices from | 1 - 2 months from go live |
| 3 | Reminder that you can now receive e-Invoices | Shortly after go live – eg within a month |
| 4 | Advising that you can receive e-invoices. Presumes you are already e-Invoicing receive capable May need to do follow up/reminders | Now! |

Email 1: Your intentions to receive e-Invoices.

Dear [name]

We're moving to e-Invoicing – you can too

E-Invoicing has started rolling out across New Zealand, and many businesses and the wider government sector are progressively becoming enabled to send and/or receive e-Invoices.

<name of department/your business name> <is/ We are> moving to e-Invoicing too and we'll be able to receive e-Invoices from you from <date/Month> onwards. <Receiving e-Invoices means we'll be able to process and pay your invoice faster. In most cases we'll be able to pay your invoice within <x> working days.>

Optional sentences if payment time is reduced from current payment terms.

To ensure we can receive and process your e-Invoices you'll need your finance or accounting system to be e-Invoicing capable and include our New Zealand Business Number (NZBN) with the other invoice information you send us. Our NZBN is <enter NZBN here>

< To help us ensure smooth processing and payment of your invoices please make sure your e-Invoices contain the following information;

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

If you have specific requirements, e.g. Format of data, Are dashes in a GST number a problem? Do you require numeric values i.e. leading zeroes? What is your reference point e.g. purchase order/ contract number or reference number.

What is e-Invoicing?

E-Invoicing is the digital exchange of invoice information directly between buyers' and suppliers' financial systems, even if these systems are different. It improves accuracy and security, reduces processing time and speeds up payments. This is a government lead initiative with MBIE leading and assisting adoption in New Zealand, see invoicing.govt.nz for more information.

The transfer of invoice information is made possible by using enabled software or an access point who use common international standards (known as Peppol), allowing different systems to 'speak' to each other.

Benefits of e-Invoicing



With e-Invoicing, you no longer need to generate paper-based or PDF invoices that have to be printed, posted or emailed, and buyers no longer need to manually enter these into their financial system.

No manual handling of your invoices means they get to the right place (and doesn't get lost) and there are no errors – all helping us to reduce delays in processing and payment of your invoices.

And because e-Invoicing allows you to connect to *any* financial system you can connect to *all* buyers from your invoicing system through the open e-Invoicing network – not just us.

Did you know that Central Government agencies are required to receive e-Invoices from their suppliers by April 2022? And there are already over 2,000 businesses in New Zealand that can receive e-Invoices.

Check with MBIE for latest statistics. This is as at June 2020

Getting started

Now's the time to get started with e-Invoicing so you can send us your e-Invoices. Here's how:

Step 1 Talk to the software provider of your finance or accounting system, accounts receivable or payable system to see if your system is e-Invoicing capable or planning to be. **<Did you know that Xero and MYOB are e-Invoicing capable?>** Check who's software is e-Invoicing capable at e-invoicing.govt.nz

Those using Xero or MYOB

<Step 2 Ask your software provider to activate the e-Invoicing feature on your system.

See **<Xero/ MYOB>** website for more information.

Xero link: <https://www.xero.com/nz/resources/e-invoicing/>

MYOB link: <https://help.myob.com/wiki/display/myob/E-invoicing>

Step 3 Make sure you've got our NBZN in your system. Our NZBN number is **<insert NZBN here>**

Those currently using paper

<If you don't use finance or accounting systems, or issue many invoices, there are FREE options with basic e-Invoicing capabilities available. [Check e-invoicing.co.nz](http://e-invoicing.co.nz) >



Medium to large businesses

<Step 2 Determine how you'll access the e-Invoicing network. The options include:

- your software provider has an e-Invoice enabled system – they will work with an access point provider on your behalf; OR
- procure an accredited access point provider to integrate e-Invoicing directly into your chosen system and connect directly to the e-Invoicing network. Check the accredited access point providers list at invoicing.govt.nz

Step 3 Implement e-Invoicing, including adding our NZBN number <insert NZBN here> to your records. Ask your buyers if they can receive e-Invoices and/or encourage your suppliers to send you e-Invoices and start gaining the benefits.>

Top tip: match your buyers and suppliers to their NZBNs with the free and secure NZBN-Business Match service. Find out how at nzbn.govt.nz

Please share this with others in your organisation who are responsible for invoice generation or processing.

Remember you can start sending your e-Invoices to us from <date/month>.

[Your name and Position]



Email 2 date confirmed when e-Invoices can be received.

Dear [name]

We're nearly ready to receive e-Invoices – are you ready to send?

You may recall we were recently in contact to let you know we're moving to e-Invoicing and we're nearly there. From <date> we'll be able to receive e-Invoices. <Receiving e-Invoices means we'll be able to process and pay your invoice faster. In most cases we'll be able to pay your invoice within <x> working days.>

Are you ready?

Remember, to ensure we can receive and process your e-Invoices you'll need your finance or accounting system to be e-Invoicing capable and include our New Zealand Business Number (NZBN) with the other invoice information you send us. Our NZBN is <enter NZBN here>

< To help us ensure smooth processing and payment of your invoices please make sure your e-Invoices contain the following information;

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

No more PDFs, no more paper

With e-Invoicing, businesses no longer need to generate paper-based or PDF invoices that have to be printed, posted or emailed. It improves accuracy and security, reduces processing time and speeds up payments.

Remember, no manual handling of your invoices means they get to the right place (and doesn't get lost) and there are no errors – all helping us to reduce delays in processing and payment of your invoices.

And because e-Invoicing allows you to connect to *any* financial system you can connect to *all buyers* from your invoicing system through the open e-Invoicing network – not just us.

Haven't started yet?

Now's the time to get started with e-Invoicing so you can send us your e-Invoices. Here's how:

Step 1 Talk to the software provider of your finance or accounting system, accounts receivable or payable system to see if your system is e-Invoicing capable or planning to be. <Did you know that Xero and MYOB are e-Invoicing capable?>. You can check who's software is already e-Invoicing capable at e-invoicing.govt.nz

Those using Xero or MYOB

<Step 2 Ask your software provider to activate the e-Invoicing feature on your system.

See <Xero/MYOB> website for more information

Xero link: <https://www.xero.com/nz/resources/e-invoicing/>

MYOB link: <https://help.myob.com/wiki/display/myob/E-invoicing>

Step 3 Make sure you've got our NBZN in your system. Our NZBN number is <insert NZBN here>

Those currently using paper

<If you don't use finance or accounting systems, or issue many invoices, there are FREE options with basic e-Invoicing capabilities available. Check e-invoicing.co.nz >

Medium to large businesses

<Step 2 Determine how you'll access the e-Invoicing network. The options include:

- your software provider has an e-invoice enabled system – they will work with an access point provider on your behalf; OR
- procure an accredited access point provider to integrate e-Invoicing directly into your chosen system and connect directly to the e-Invoicing network. Check the [accredited access point providers list at e-invoicing.govt.nz](http://e-invoicing.govt.nz)

Step 3 Implement e-Invoicing, including adding our NZBN number <insert NZBN here> to your records. Ask your buyers if they can receive e-Invoices and/or encourage your suppliers to send you e-Invoices and start gaining the benefits.>

Top tip: match your buyers and suppliers to their NZBNs with the free and secure NZBN-Business Match service. Find out how at nzbn.govt.nz

Please share this with others in your organisation who are responsible for invoice generation or processing.

Remember you can start sending your e-Invoices to us from <date/month>.

[Your name and Position]

Email 3 – e-Invoicing is live and you can start receiving e-Invoices from suppliers. Only send to suppliers not yet sending e-Invoices.

Dear *[name]*

We're accepting e-Invoices

You may recall we were recently in contact to let you know we're moving to e-Invoicing. We're pleased to let you know that we can now receive e-Invoices. <Receiving e-Invoices means we'll be able to process and pay your invoice faster. In most cases we'll be able to pay your invoice within <x> working days.>

Are you ready?

Don't worry if you're not ready yet. You can still send us your PDF invoice until you're ready to send e-Invoices. Remember you'll need your finance or accounting system to be e-Invoicing capable and include our New Zealand Business Number (NZBN) with the other invoice information you send us. Our NZBN is <enter NZBN here>

<To help us ensure smooth processing and payment of your invoices please make sure your e-Invoices contain the following information;

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

There's still time to get started

Now's the time to get started with e-Invoicing so you can send us your e-Invoices. Take the first step today.

Talk to the software provider of your finance or accounting system, accounts receivable or accounts payable system to see if your system is e-Invoicing capable or planning to be.

Those currently using paper

<If you don't use finance or accounting systems, or issue many invoices, there are FREE options with basic e-Invoicing capabilities available. [Check e-invoicing.co.nz](http://e-invoicing.co.nz) >

Remember when you're ready to send e-Invoices, we're ready to receive them.

[Your name and Position]

Email 4 – you’re already e-Invoicing receive capable

To CFOs and finance teams or your supplier contact (CFO/AP AR Manager/Team lead,)

Dear [name]

We’ve moved to e-Invoicing – you can too

E-Invoicing has started rolling out across New Zealand, and many businesses and the wider Government sector are progressively becoming enabled to send and/or receive e-Invoices.

We’ve recently moved to e-Invoicing and can now receive e-Invoices.

To ensure we can receive and process your e-Invoices you’ll need your finance or accounting system to be e-Invoicing ‘send’ capable and include our New Zealand Business Number (NZBN) with the other invoice information you send us. The NZBN is the unique global identifier that ensures the e-Invoices you send reaches us. **Our NZBN is <enter NZBN here>.**

< To help us ensure smooth processing and payment of your invoices please make sure your e-Invoices contain the following information;

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

<list other requirements specific to your organisation>

If you have specific requirements, e.g. Format of data, Are dashes in a GST number a problem? Do you require numeric values i.e. leading zeroes? What is your reference point e.g. purchase order/ contract number or reference number.

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The transfer of invoice information is made possible by using enabled software or an access point who use common international standards (known as Peppol), allowing different systems to ‘speak’ to each other.

Benefits of e-Invoicing

Simpler – less admin and data entry. Businesses no longer need to generate paper-based or PDF invoices that have to be printed, posted or emailed, and buyers no longer need to manually enter these into their financial system.



Smarter- No manual handling of your invoices means they get to the right place (and don't get lost) and there are no errors – all helping us to reduce delays in processing and payment of your invoices.

And because e-Invoicing allows you to connect to *any* financial system you can connect to *all* buyers from your invoicing system through the open e-Invoicing network – not just us.

Did you know that Central Government agencies are required to receive e-Invoices from their suppliers by April 2022? And there are more than 2,000 businesses that can already receive e-Invoices.

More secure – because invoice data is exchanged directly between accounting systems, through an open and secure network, there's less risk of mistakes or fraud. It's as secure as internet banking.

Getting started

Now's the time to get started with e-Invoicing so you can send us your e-Invoices. Here's how:

Step 1 Talk to the software provider of your finance or accounting system, accounts receivable or payable system to see if your system is e-Invoicing capable or planning to be. <Did you know that Xero and MYOB are e-Invoicing capable?> You can check who's software is already e-Invoicing capable at e-invoicing.govt.nz

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MYOB link: <https://help.myob.com/wiki/display/myob/E-invoicing>

Step 3 Make sure you've got our NBZN in your system. Our NZBN number is <insert NZBN here>

Those currently using paper

<If you don't use finance or accounting systems, or issue many invoices, there are FREE options with basic e-Invoicing capabilities available. Check e-invoicing.co.nz >

Medium to large businesses

<Step 2 Determine how you'll access the e-Invoicing network. The options include:

- your software provider has an e-invoice enabled system – they will work with an access point provider on your behalf; OR
- procure an accredited access point provider to integrate e-Invoicing directly into your chosen system and connect directly to the e-Invoicing network. Check the [accredited access point providers list at invoicing.govt.nz](#)

Step 3 Implement e-Invoicing, including adding our NZBN number <insert NZBN here> to your records.>

Top tip: match your buyers and suppliers to their NZBNs with the free and secure NZBN-Business Match service. Find out how at [nzbn.govt.nz](#)

Please share this with others in your organisation who are responsible for invoice generation or processing.

Remember you can start sending your e-Invoices to us as soon as you're ready. Don't worry, you can still send us your PDF invoices until you're ready to send e-Invoices.

[Your name and Position]



Helpful links and additional resources;

[e-Invoicing website](#): where you'll find:

- This supplier readiness communication toolkit
- [e-Invoicing video](#)
- Supplier checklist
- [List of Central Government agencies with NZBN numbers](#)

MYOB website – e-Invoicing page: <https://help.myob.com/wiki/display/myob/E-invoicing>

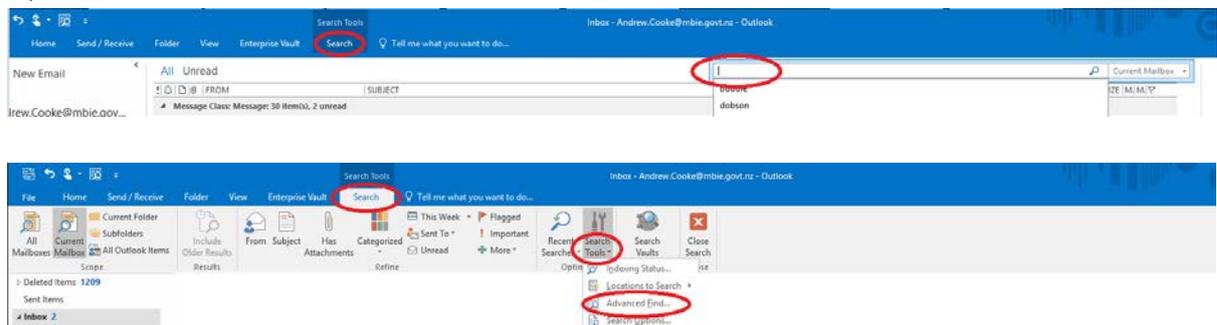
Xero website – e-Invoicing page: <https://www.xero.com/nz/resources/e-invoicing/>

Appendix 1: How to search Outlook 2016 for organisations who use Xero and MYOB to generate invoices

Select the folder where the archived emails containing your organisations invoices are stored. This can be a parent folder per the example below.

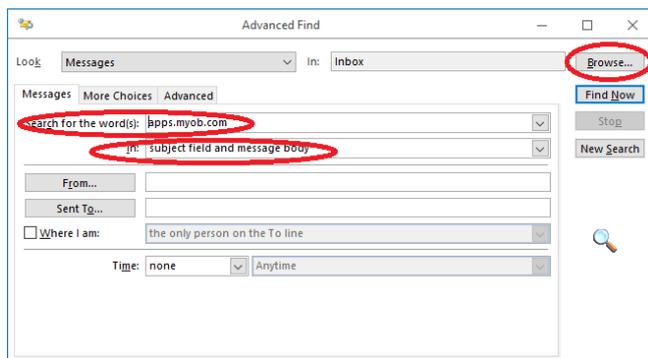


Open advanced search/find

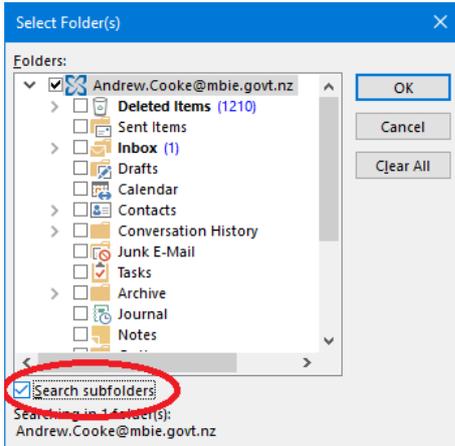


Enter one of the following search criteria in the **Search for the word(s)** field:
apps.myob.com
post.xero.com

Select **subject field and message body** on the **In** menu, then select **Browse**



Select Search subfolders

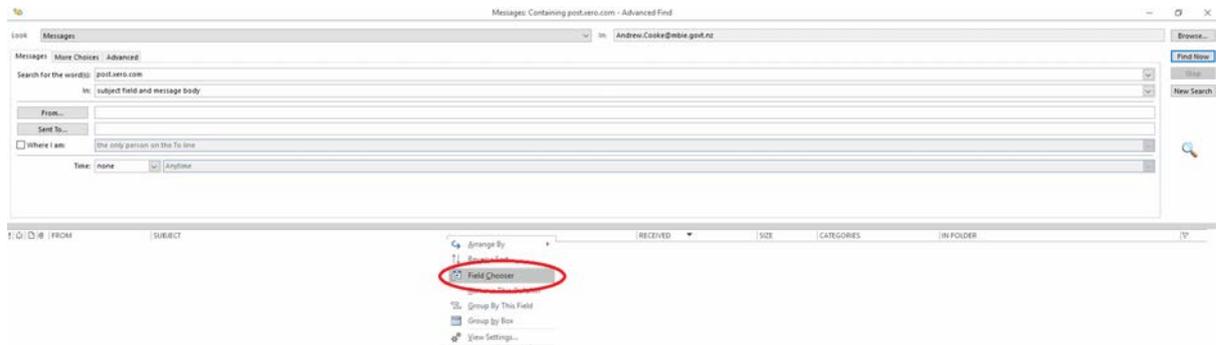


Sort by sender, then copy and paste to Excel (ctrl A, ctrl C then ctrl P in Excel)

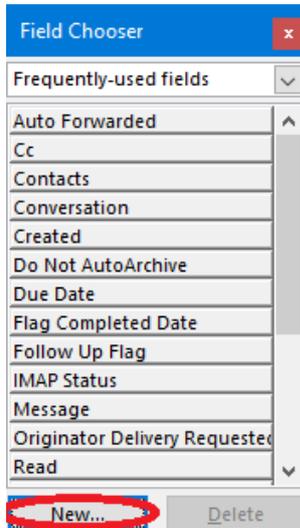
Repeat steps for both search terms.

How to add an email address column to the search results

It may be useful to extract the email address as part of the search. To do this, you will need to select the **Field Chooser** by right clicking your mouse on the field headings in the results window.



Select **New**



Enter the following in the fields:

Name: **Full**

Type: **Formula**

Format: **IIf(InStr([SearchFromEmail], "@") = 0, "", Left([SearchFromEmail], InStr([SearchFromEmail], "@") - 1) + "@" + Mid([SearchFromEmail], InStr([SearchFromEmail], "@") + 1))**

You will need to add the field every time you perform a search. It will be saved under **User-defined fields**.



Further guidance

- Verify that the advanced search is capturing all data:
 - o Pivot the exported data to get a count of each individual sender (**From**). You should have two lists as there are currently two search terms.
 - o Copy one address at random then perform another advanced search, but this time searching the **From** field.
 - o Check to see if the same number of emails are returned in the search. If more emails are returned, then the advanced find /search may not be working properly.
- Look for other search terms on the off chance that the two provided do not capture every MYOB/Xero scenario:
 - o Review a shortlist of emails already identified as containing MYOB/Xero invoices.
 - o Seek common terms or strings.
 - o Use advanced find to see if there are any new hits.
- Create unique references to allow vlookups in the spreadsheet which contains a summary of all emails. This will allow some of the checks above to be performed
 - o Concatenate (function X&X) fields such as email address, date received and subject.
 - o Run a count function the results to check there are no duplicates.