
eInvoicing Communication Toolkit

Getting your suppliers ready for eInvoicing



eInvoicing | Pūtea Tāhiko

Faster. Smoother. Safer.
It's the next step, for Kiwi business.



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĀKINA WHAKATUTUKI

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How to use this toolkit

This communication toolkit aims to support businesses and government eInvoicing implementation, specifically to aid in encouraging suppliers to get eInvoicing capable and to begin sending eInvoices to your organisation.

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

Ideally you should start communicating with your suppliers before your technical implementation is completed. Larger organisations, in particular, need more time to get ready to send eInvoices.

Pro tip:

If your organisation has specialist communications or data analysis people, engage them early to help with getting your trading partners on board with eInvoicing.

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
- Template content for email signatures
- Helpful links and additional resources

Segmentation options

Analysis of your suppliers will help you identify and group suppliers to prioritise those that should be approached first to be encouraged to send you eInvoices. Grouping suppliers also allows you to tailor the messages so they are relevant to that supplier group's situation. There are many ways you could group or prioritise customers.

The easiest suppliers to bring on board to send and/or receive eInvoices are those that:

- Use eInvoicing enabled software. Most small businesses already have easy, affordable access to eInvoicing capability already (e.g. Xero, MYOB, WorkflowMax), with many business and accounting software products progressively adding the functionality throughout 2022 (e.g. Reckon). [See the 'How to guide – Identifying Xero and MYOB suppliers on Outlook'](#). It's easy and quick for these suppliers to start eInvoicing. Even though these suppliers may send a low volume of invoices, there may be many suppliers so the volume of eInvoices can add up
- Are already eInvoicing (because they've advised you they can send eInvoices or you know that they send eInvoices to other customers) – let them know you can receive eInvoices now
- Are already registered to receive eInvoices – this indicates they may be using software that can easily send eInvoices, too.
- 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 eInvoicing than a smaller business that uses software that's already eInvoicing enabled. They will need a 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 eInvoicing, they may also help get the contact details (i.e., email address) of the right person to reach with eInvoicing 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 plus a six-monthly or annual reminder.

Contact all but tailor for different supplier groups		Pre-go-live		Live	Post go-live
		- 6 months	- 2 months	go	T+1 month
Email 1	Heads up, we'll be eInvoicing by <month/year>. You can too - get ready				
Email 2	From <go live date> we'll be accepting eInvoices.				
Email 3	We're now accepting eInvoices, send your eInvoices from now on				
Email 5	6-monthly or annual reminder - We accept eInvoices			+1yr	

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

Staggered rollout - Priority groups (PG1, PG2, PG3)		Pre-go-live		Live go	Post go-live				
		- 6 months	- 2 months		+1 month	+2 months	+3 months	+4 months	+5 months
Email one (ALL)	Heads up, we'll be eInvoicing by <month/year>. You can too - get ready <to select few within PG1> We'd like to invite you to test eInvoicing with us								
PG1 Email 2	From <go live date> we'll be accepting eInvoices.								
PG1 Email 3	We're now accepting eInvoices, send your eInvoices from now on								
PG2 Email 2	We're now accepting eInvoices, send your eInvoices from now on								
PG2 Email 3	Remember, we're now accepting eInvoices								
PG3 Email 2	We're now accepting eInvoices, send your eInvoices from now on								
PG3 Email 3	Remember, we're now accepting eInvoices								
ALL Email 5	6-monthly or annual reminder - We accept eInvoices								

Email templates

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

- Those identified as registered on the Peppol (eInvoicing) network to receive eInvoices. Chances are they can also send eInvoices.
- 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 online eInvoicing 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 indicated 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 eInvoices.	Depends on your targeting/segmentation approach. For large suppliers, typically 6 months out Smaller businesses, maybe 1 month out
2	Advising your specific date that you can receive eInvoices from	1 month from go-live
3	Reminder that you can now receive eInvoices	Shortly after go-live – e.g within a month
4	Advising that you can receive eInvoices. Presumes you are already eInvoicing 'receive capable' May need to do follow-up/reminders	Now!
5	Follow-up reminders to suppliers still sending PDFs	Six-monthly or annually
6	Email to send to your buyers. If you don't know if your buyers can accept eInvoices from you, use this email to ask them.	As soon as you're able to send eInvoices

Email 1: Advising your intentions to receive eInvoices.

Dear [name]

We're moving to eInvoicing – you can too

eInvoicing is rolling out across New Zealand, with many businesses and the wider government sector progressively becoming enabled to send and receive eInvoices. There are already over 5,000 businesses registered to receive eInvoices and growing monthly.

Check eInvoicing.govt.nz for latest statistics.
This is as of April 2022

<name of department/your business name> <is/ We are> moving to eInvoicing too and we'll be able to receive eInvoices from you from <date/Month> onwards. <Receiving eInvoices 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 eInvoices you'll need your finance or accounting system to be able to send eInvoices 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, we'd like to remind you to make sure your eInvoices include:

<a purchase order number>

<a cost centre and natural account number>

<a contract number>

So, check with your <name of organisation>'s contact person.>

<Delete or add list other requirements specific to your organisation>

If you have specific requirements, e.g. reference information e.g. purchase order, contract number or reference number.

What is eInvoicing and how does it benefit you?

eInvoicing | Pūtea Tāhiko

eInvoicing is the digital exchange of invoice information directly between buyers' and suppliers' financial systems, even if these systems are different.

With eInvoicing, 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 enter these manually into their financial system.

Removing manual handling of your invoices means they get to the right place (and don't get lost) and prevents errors from happening – all helping to reduce delays in processing and payment of your invoices. It:

- improves accuracy and security,
- reduces processing time and
- speeds up payments.

Because eInvoicing allows you to connect to *any* financial system you can connect to *all buyers* from your invoicing system through the open network.

Getting started

Now's the time to get started with eInvoicing so you can send us eInvoices instead of PDFs. Here's how:

Choose the following content depending on the supplier analysis identifying which software your supplier is using

Where you have identified the supplier is already registered on the Peppol (eInvoicing) Directory

We understand you're already registered to *receive* eInvoices (your accountant, bookkeeper or invoicing software provider may have registered on your behalf if you haven't done this yourself).

So, chances are you may also be able to *send* eInvoices. Just make sure you record our NZBN and then send any future invoices to us as eInvoices.

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It's easy to get started if you're using Xero

Xero can send and receive eInvoices, so it's really easy to get set up to send eInvoices if you're on a Xero Starter, Standard or Premium plan.

Simply follow their quick and easy instructions and you're good to go. Watch their video or check out their website for instructions.

[Send and receive eInvoices \(NZ\) - YouTube](#)

[Send an invoice – Xero Central](#)

[Register to receive eInvoices – Xero Central](#)

[What to do when you receive an eInvoice](#)

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It's easy to get started if you're using MYOB

MYOB can send eInvoices, so it's really easy to get set up to send eInvoices if you use MYOB Essentials (also called MYOB Business) or you access your AccountRight company file in a web browser.

Simply follow their quick and easy instructions and you're good to go. Check out their website for instructions.

[eInvoicing - MYOB Business - MYOB Help Centre](#)

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For infrequent invoices, paper invoices, NGOs not using Xero or MYOB

Most small businesses already have easy, affordable access to eInvoicing capability. Many business and accounting software products can already send or receive eInvoices with many more progressively adding the functionality throughout 2022.

If you don't use finance or accounting systems, or don't issue many invoices, there are free online portals available for sending eInvoices. This means businesses can access eInvoicing capabilities without the need to buy eInvoicing-capable accounting or invoicing software. Check the eInvoicing website for the list of eInvoicing online portals available.

[Software providers | eInvoicing](#)

Check out the 'how to' guides on the eInvoicing website to get started to send and/or receive eInvoices.

- [Sending eInvoices: How to get started](#)
- [Receiving eInvoices: How to get ready](#)

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For all other suppliers:

Most small businesses already have easy, affordable access to eInvoicing capability. Many business and accounting software products are already eInvoicing capable with many more progressively adding the functionality throughout 2022.

Below are three steps to get you started to send eInvoices:

1. Check your accounting or invoicing software provider's website to see if your system is eInvoicing capable. Or check the growing list of eInvoicing-enabled software providers on the eInvoicing website. [eInvoicing-enabled software providers](#)
2. Find and load up your buyers' [New Zealand Business Numbers](#) (NZBNs) into their customer record in your invoicing software.

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3. Ask your buyers for their NZBN and if they can receive eInvoices. Send eInvoices to buyers who can receive them.

Check out our 'how to' guides to get started to send and receive eInvoices.

- [Sending eInvoices: How to get started](#)
- [Receiving eInvoices: How to get ready](#)

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Top tip: match your buyers and suppliers to their New Zealand Business Numbers (NZBNs) with the free and secure NZBN-Business Match service.

[NZBN Business Match service](#)

Remember you can start sending us eInvoices instead of PDFs from <date/month>.

[Your name and Position]

Email 2: date confirmed when eInvoices can be received.

Dear [name]

We're nearly ready to receive eInvoices – are you ready to send?

You may recall we were recently in contact to let you know we're moving to eInvoicing and we're nearly there. From <date> we'll be able to receive eInvoices. <Receiving eInvoices 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.

Are you ready?

Remember, to ensure we can receive and process your eInvoices you'll need your finance or accounting system to be able to send eInvoices 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, we'd like to remind you to make sure your eInvoices include:

<a purchase order number>

<a cost centre and natural account number>

<a contract number>

So, check with your <name of organisation>'s contact person.>

<Delete or add list other requirements specific to your organisation>

No more PDFs, no more paper

With eInvoicing, 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 don't get lost) and there are no errors – all helping us to reduce delays in processing and payment of your invoices.

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

Haven't started yet?

Now's the time to get started with eInvoicing so you can send us your eInvoices. Here's how:

Insert relevant copy from email 1

Remember you can start sending us eInvoices instead of PDFs from <date/month>.

[Your name and Position]

Email 3: eInvoicing is live and you can start receiving eInvoices from suppliers. Send only to suppliers not yet sending eInvoices.

Dear [name]

We're accepting eInvoices

You may recall we were recently in contact to let you know we're moving to eInvoicing. We're pleased to let you know that we can now receive eInvoices. <Receiving eInvoices 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 eInvoices. Remember you'll need your finance or accounting system to be able to send eInvoices 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, we'd like to remind you to make sure your eInvoices include:

<a purchase order number>

<a cost centre and natural account number>

<a contract number>

So, check with your <name of organisation>'s contact person.>

<Delete or add list other requirements specific to your organisation>

There's still time to get started

Now's the time to get started with eInvoicing. Take the first step today.

Insert relevant copy from email 1

Remember when you're ready to send eInvoices, we're ready to receive them.

[Your name and Position]

Email 4: You're already eInvoicing 'receive capable'

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

Dear [name]

We've moved to eInvoicing – you can too

eInvoicing continues to be adopted across New Zealand, with many businesses and the wider government sector progressively becoming enabled to send and receive eInvoices. There are already over 5,000 businesses registered to receive eInvoices and growing monthly.

We're able to receive eInvoices and we'd like you to consider adopting eInvoicing to send us invoices instead of PDFs. <Receiving eInvoices 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 invoices you'll need your finance or accounting system to be able to send eInvoices 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 eInvoices you send reach us.

Our NZBN is <enter NZBN here>.

To help us ensure smooth processing and payment of your invoices, we'd like to remind you to make sure your eInvoices include:

<a purchase order number>

<a cost centre and natural account number>

<a contract number>

So, check with your <name of organisation>'s contact person.>

<Delete or add list other requirements specific to your organisation>

If you have specific requirements, e.g. information purchase order, cost centre, contract number or other reference number.

What is eInvoicing and how does it benefit you?

eInvoicing is the digital exchange of invoice information directly between buyers' and suppliers' financial systems, even if these systems are different.

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With eInvoicing, 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 enter these manually into their financial system.

Removing manual handling of your invoices means they get to the right place (and don't get lost) and prevents errors from happening – all helping to reduce delays in processing and payment of your invoices. It:

- improves accuracy and security,
- reduces processing time and
- speeds up payments.

Because eInvoicing allows you to connect to *any* financial system you can connect to *all buyers* from your invoicing system through the open network.

Getting started

Now's the time to get started with eInvoicing. Here's how:

Insert relevant content from email 1

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

[Your name and Position]

Email 5: 6-monthly or annual email to suppliers who continue to send PDF invoices

We're accepting eInvoices

eInvoicing continues to be adopted across New Zealand, with many businesses and the wider government sector progressively becoming enabled to send and receive eInvoices.

There are already thousands of businesses registered to receive eInvoices and growing monthly - including <name of business>.

We notice you're still sending us PDF invoices. Please consider sending us eInvoices instead of PDFs – it'll help us process your invoice faster.

You'll need your finance or accounting system to be able to send eInvoices 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 eInvoices you send reach us.

Our NZBN is <enter NZBN here>.

< To help us ensure smooth processing and payment of your invoices, we'd like to remind you to make sure your eInvoices include:

<a purchase order number>

<a cost centre and natural account number>

<a contract number>

So, check with your <name of organisation>'s contact person.>

<Delete or add list other requirements specific to your organisation>

If you have specific requirements, e.g. purchase order, cost centre, contract number or other reference number.

What is eInvoicing and how does it benefit you?

eInvoicing is the digital exchange of invoice information directly between buyers' and suppliers' financial systems, even if these systems are different.

With eInvoicing, 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 enter these manually into their financial system.

Removing manual handling of your invoices means they get to the right place (and don't get lost) and prevents errors from happening – all helping to reduce delays in processing and payment of your invoices. It:

- improves accuracy and security,
- reduces processing time and

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- speeds up payments.

Because eInvoicing allows you to connect to *any* financial system you can connect to *all buyers* from your invoicing system through the open network.

Getting started

Now's the time to get started with eInvoicing. Here's how:

Insert relevant content from email 1

Remember you can send eInvoices to us as soon as you're ready.

[Name and title]

Email 6: Email to send to your buyers. If you don't know if your buyers can accept eInvoices from you, use this email to ask them.

We've moved to eInvoicing – have you?

Have you heard about eInvoicing? It's rolling out across New Zealand, with many businesses and the wider government sector progressively becoming enabled to send and receive eInvoices. There are already thousands of businesses registered to receive eInvoices and growing monthly.

We want to send you eInvoices

We prefer to send (and receive) eInvoices and we'd like you to consider receiving eInvoices from us instead of PDF invoices in an email. eInvoices are received directly into your accounting software, so you save time on manual data entry and processing.

Please let us know your NZBN and confirm if you're connected to the eInvoicing network. Then we'll start sending you an eInvoice instead of a PDF.

Check out the eInvoicing website (www.einvoicing.govt.nz) if you want to find out more.

We can send you eInvoices as soon as you're ready. Rest assured; we can still send you PDF invoices until you're ready to receive eInvoices from us.

I look forward to hearing from you.

[Your name and Position]

Content for your email signature

eInvoicing is still growing across New Zealand, so it'll take some time for all businesses to get on board. The more businesses that send and receive eInvoices, the more we all share in the benefits such as admin time-savings and faster payments.

A great way to help speed things up is to highlight that your business can send or receive eInvoices – in your business conversations, in your contracts or within your email signature.

If you can receive eInvoices, add the following to your business's email signature for relevant roles (such as accounts payable team members or auto responses for AP enquiries):



We prefer to receive eInvoices instead of PDFs. Our NZBN is xxxxxxxxx

If you can send eInvoices, add the following to your business's email signature for relevant roles (such as accounts receivable and procurement team members) and PDF invoices:



We prefer to send eInvoices instead of PDFs. It'll make it faster and easier for you to process our invoices. Let us know your NZBN and if your business can receive eInvoices.

Helpful links and additional resources

Check our [eInvoicing website](#), where you'll find:

- This supplier readiness communication toolkit
- Supplier checklist
- How to get set up to send eInvoices (PDF and video)
- How to get set up to receive eInvoices (PDF and video)
- List of eInvoicing enabled software providers including free eInvoicing portals available
- Government agencies' eInvoicing status with NZBN numbers
- 'How to' guide – Identifying Xero and MYOB supplier in Outlook
- How to search the Peppol Directory to identify other businesses registered to receive eInvoices
- Case studies of businesses adopting and using eInvoices

[NZBN Business Match service](#) – a free and secure government service to match a list of businesses to their New Zealand Business Numbers (NZBNs)

MYOB website – eInvoicing page: <https://help.myob.com/wiki/display/myob/EInvoicing>

Xero website – eInvoicing page: <https://www.xero.com/nz/resources/eInvoicing/>