

eInvoicing change management guide

February 2025

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February 2025

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# Purpose

This document provides guidance for managing your organisation’s change to eInvoicing, from a people and process perspective. It provides change management and communications tips to ensure a smooth transition to eInvoicing.

This guide focuses on change and communications to two key audiences:

* Your **internal people,** who need to understand and buy into the move to eInvoicing.
* Your **customers/suppliers,** who will transition to the eInvoicing channel over time.

Separate resources are available for:

* [eInvoicing Implementation Guide](https://www.einvoicing.govt.nz/assets/eInvoicing/einvoicing-implementation-guide-december-2024.docx)
* [Business case guidance](https://www.einvoicing.govt.nz/assets/eInvoicing/einvoicing-business-case-guidance-material.docx)

Tailoring and implementing the recommendations in this guide will set your organisation up for success and realise the benefits from your investment in eInvoicing.

# Section 1 – Prepare for the change

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| PRO TIP  Change management is key to delivering and realising the benefits of eInvoicing. Identify the people who will help deliver the change well before you go live and ensure they use this guide to start preparing for the change. |

### What changes should you expect with eInvoicing?

Receiving eInvoices

* eInvoice data is received directly into your finance system. PDF invoices will not be emailed or posted to your organisation. You can receive PDF attachments with your eInvoice.
* Invoice data in the finance system may look different, be in a different place or presented differently.
* Receiving an eInvoice doesn’t mean it is automatically approved. So, the approval process won’t change.
* You’ll need to understand which suppliers are eInvoicing capable, and work with them to encourage them to send you eInvoices.
* eInvoicing is another channel to receive invoices. It sits alongside your existing invoicing channels and will grow over time.

Sending eInvoices

* eInvoices are generated by your invoicing system and sent directly to your customers’ accounting or finance system. Your team will no longer send an emailed PDF invoice or printed and posted invoice. You may send PDF attachments with your eInvoice.
* You’ll need to monitor which customers are registered to receive eInvoices and save their New Zealand Business Number (NZBN) in your system.

[List of businesses registered to receive eInvoices](https://www.einvoicing.govt.nz/assets/eInvoicing/nz-businesses-registered-to-receive-einvoices.xlsx?vid=36)

Moving to eInvoicing is not a ‘one and done’ process - the transition from emailed invoices to eInvoices will take time and effort. It requires you to:

* Look across your existing business processes, consider what might need to change to enable eInvoicing.
* Understand what and who these changes might impact and what actions need to be taken to minimise the impacts of these changes.
* Consider your staff communication and training to help them deliver and adopt the change.
* Develop and implement a plan for supplier/customer communication and onboarding.
* Ensure adequate resources are allocated to appropriately support and deliver the change.

Like any change process, you’ll want to pay particular attention to:

|  |  |
| --- | --- |
| Awareness and Desire | Building an understanding of what eInvoicing is and clearly communicating its benefits to all stakeholders. |
| Knowledge | Offering clear and comprehensive training to ensure everyone understands the new system and processes and their role in this. |
| Ability | Actively listening to concerns and questions and providing clear answers. Supporting end users to use the new system and processes |
| Reinforcement | Reinforcing the move to eInvoicing with your people and supplier/customers, celebrating benefits and milestones along the way. |

### Develop your change/communications plan

Develop your change management and internal communications and training plan. This will be unique to your organisation. The key sections we recommend considering include:

* [Stakeholder mapping](#stakeholder)
* [Internal business processes](#business)
* [Champions and leadership](#champion)
* [A checklist of key pre-change tasks](#checklist) and readiness assessment
* [Preparing your communications material](#communications) (with suggested templates).

Also consider:

🞎 Establishing a customer care team and a go-live support plan

🞎 Developing training for affected teams

🞎 A plan to monitor and report eInvoice transactions and workflows

#### Stakeholder mapping

The change to eInvoicing impacts different stakeholders. This table provides a view of the impact to various stakeholder groups. It outlines considerations to influence them during various stages of your eInvoicing journey.

| Stakeholder group | Impact | Pre-implementation | Implementation | Embed |
| --- | --- | --- | --- | --- |
| Sponsor and Senior leaders:   * Finance teams * Procurement * Business leaders (with VIP or high-volume suppliers) * IT/Systems | Low impact   * Advocate and drive adoption | * Understand, support, and advocate the adoption of eInvoicing for your organisation * Provide and help prioritise resources | * Advocate * Report, acknowledge and celebrate progress and success | |
| eInvoicing Project team members:   * Project manager/champion * Change/training/comms team members * Supplier/customer onboarding lead | High impact   * Advocate and drive adoption * Support and be accountable for benefit realisation * May include additional/temporary resource outside of BAU | Prepare and support:   * Change management plan * Technical and non-technical implementation tasks * Training, including ‘how to’ resources * Supplier and customer onboarding guidance | * Triage and provide go live/hypercare and post go live support * Proactively drive supplier and customer behaviour change | Proactively drive supplier and customer behaviour change |
| Accounts payable/receivable teams:   * Team leaders * Coders and processors * Exception processors | Some impact   * Advocate and drive adoption * Adapt to minor changes with how invoice data is presented, e.g. the invoice data in the finance system may look different, be in a different place or presented differently. * Tasks are the same, but the ‘how’ may differ slightly | * Understand eInvoicing and the ‘why’ * Understand how eInvoicing works in your organisation’s system and be able to support others in your organisation * Learn new ways of finding and interpreting eInvoice data in your finance system for BAU tasks * Get used to not receiving and viewing a PDF invoice * Promote eInvoicing with customers or suppliers * Learn new exception processes if required | | Continue to promote eInvoicing with customers or suppliers |
| The business:   * Requisitioners of goods or services from suppliers * Project Managers * Supplier/Customer account managers * Cost centre approvers * Contract managers * EAs/PAs/Admin staff | Medium impact   * Requisitioners should clearly communicate your organisation’s NZBN and eInvoice requirements to suppliers at point of purchase, e.g. request an eInvoice, provide the correct cost centre, account code, or purchase order number – to smooth the processing of eInvoices * Checking and approving invoices is an infrequent ad hoc, admin task – therefore the change is low impact. However, PDF invoices are not emailed to them from supplier or internal teams for checking * eInvoice data looks different in the finance system when I have to approve, or to check * May not even realise they are processing an eInvoice | * Understand change is coming - what is eInvoicing , why your organisation is adopting it, benefits etc * Pre-go live training | * Understand how eInvoicing works in your organisation’s system and be able to support peers * Requisitioners should clearly communicate invoice requirements to suppliers at point of purchase, e.g. provide the correct cost centre, account code, or purchase order number, contact name, and confirm where or how to send the invoice or eInvoice * Learn new ways of finding and interpreting eInvoice data in your finance system for BAU tasks * Learn new exception processes if required | Encourage and support suppliers to send eInvoices |
| ‘New supplier’/’Supplier admin’ teams:  ‘New customer’/’customer onboarding’ teams | Maybe high impact   * Onboarding processes will differ slightly capturing and maintaining NZBN and eInvoicing capability of suppliers and customers. * Maybe higher impact if this team is responsible for onboarding existing suppliers for eInvoicing | * Understand eInvoicing and the ‘why’ * Complete the pre-implementation tasks, and in particular capturing or verifying NZBNs in your supplier and customer records. | Promote eInvoicing with external customers or suppliers | Maintain NZBN and eInvoicing capability data of suppliers and customers. |
| Finance help desk / Service desk | Some impact   * Invoice data in the finance system may look different, be in a different place or presented differently. | * Understand eInvoicing and the ‘why’ * Prepare generic email templates or FAQs to respond to queries * Pre-go live training | * Answer eInvoicing related queries from internal and external customers * Know where to seek support. |  |
| Finance Systems teams | Medium impact   * Will need to understand and implement how eInvoice data is mapped into their system and how that translates for users. * May need to develop new or adjust existing reporting | * Implement/map eInvoice data into your system * Review business rules and exception processes and amend or create news ones as required. * Liaise with training teams for system use and guidance material. * Develop reporting (eInvoices vs other invoices – number of suppliers sending eInvoices, number/percentage of eInvoices processed, number of eInvoices sent to customers etc) | * Implement, produce, share reporting, * Resolve go live and post go live issues | Help internal stakeholders track progress (e.g. onboarding and payment times) by producing, sharing or maintain reports |
| Third party providers – e.g. OCR providers | Some impact   * Another channel to get invoice info into the organisation’s finance system | Understand eInvoicing and the ‘why’ | May be able to identify ‘quick win’ suppliers currently sending PDFs but known to be capable to send or receive eInvoices (e.g. Xero and MYOB users) | Implement automated responses to suppliers sending invoices via Xero or MYOB |
| Procurement teams:   * Supplier relationship managers * Commercial/Contract managers * People responsible for tenders/RFP docs/templates and processes | Minimal impact   * They play an important role in advocating and driving adoption of eInvoicing in their organisation and with suppliers | Understand eInvoicing and the ‘why’  Prepare Talking Points/ Reference Guides to support supplier relationship conversations  Prepare generic email templates or FAQs to respond to queries from suppliers | * Encourage and support suppliers to send eInvoices / ask customers if they are ready to start receiving eInvoices * Add eInvoicing as a preference or ‘must do’ to procurement docs and organisation’s website. * Supplier relationship conversations | |

#### Internal business processes

Although eInvoicing is just another channel for receiving invoices (alongside paper, PDF invoices and existing bespoke EDI solutions[[1]](#footnote-1)), consider if any wider business process change or updates to roles and responsibilities, are required to maximise the benefits of eInvoicing.

The table below outlines considerations for common business processes:

| Business Process | Change consideration |
| --- | --- |
| Invoice validations | * Review invoice validations at a process and system level and identify if any of these validations are no longer required, or if new ones are required. |
| Communicating to suppliers about billing | Requesitioners of goods and services (or relevant team members) need to:   * Request suppliers to send eInvoices as the default (instead of emailing a PDF invoice) * Provide suppliers with your organisation’s NZBN (instead of an email address) * Ensure invoice reference information is passed on to suppliers to include within their eInvoices – e.g. purchase order numbers or cost centre/account numbers * Help provide a positive experience for first time senders or receivers of eInvoices |
| New supplier or customer onboarding  Maintenance of supplier and customer records | * Update ‘new supplier’ and ‘new customer’ forms and processes to:   + Advise that ‘eInvoicing’ is your organisation’s preferred channel for receiving/sending invoices.   + Capture NZBNs   + Validate whether suppliers can send eInvoices or customers can receive eInvoices * The NZBN may also be used as a data point to validate/verify a supplier eInvoice – as part of processing an invoice * You’ll need your customers’ NZBNs to be able to send them eInvoices * Work with your systems team to develop an API for regular data feeds to your finance system to ensure NZBN information is kept up to date |
| Receiving eInvoices: Requisitioners of goods and services from suppliers won’t receive an emailed (PDF) invoice | * Requisitioners of goods and services from suppliers will change how they receive an invoice and may not be aware an eInvoice has been received or is in the finance system * The invoice information in the finance system may look different. Some finance systems may render the eInvoice information to appear in a PDF/document format. This is a mindset change for some staff to get used to (old habits die hard) |
| Coding or processing an invoice | * The invoice data may look different in your finance system, e.g. the data points may be in a different place * Those coding or processing an invoice need to get used to seeing the invoice data differently. They should be able to find the information they need to code and process the invoice. Develop or update training/guides to support them with the new process * Suppliers may continue to attach a PDF, or other associated information such as timesheets, when sending an eInvoice. However, once people become accustomed to eInvoicing, they’re unlikely to continue attaching PDFs. Encourage your team members to process and approve invoices without the need to view a PDF |
| Receiving an eInvoice. Receiving an eInvoice doesn’t mean it is automatically approved, therefore, approval process won’t change | Those approving the invoice will still need to know how to view the detail of the invoice to be able to approve it. particularly if the invoice details are rendered in a summarised view. Sometimes eInvoices are approved without the person knowing it is an eInvoice |
| Internal practices for purchase orders, goods receipting, centralising invoice receipt or approvals | If you have a purchase order solution in place, staff may be required to goods receipt before an invoice is entered into the system. Does this change if an eInvoice is goods receipted after it enters the system?  Are your approval processes consistent across your organisation? Do you need to standardise approval processes. |
| Payment of invoices | To facilitate faster payments, consider paying eInvoices as soon as they’re approved – rather than waiting until the 20th of the month/standard payment terms[[2]](#footnote-2) |
| Exception processes | Consider whether you need to develop new exception processes relating to eInvoices, e.g. if rejected due to missing information. Staff may need to be trained in how to manage these exceptions. Your suppliers may need to be made aware of potential reasons for rejections and how to ensure these are avoided. Consider if template responses to suppliers need to be updated to reflect any new rejection reasons. |

#### Champions and leadership

Organisations that have strong executive support and leadership, and champion/s who are passionate about driving eInvoicing, have more success in implementing and embedding the change than those that don’t.

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| PRO TIP  Strong and visible sponsorship and leadership are key to delivering and realising the benefits of eInvoicing. Identify and empower champions early in your implementation |

### Pre-change communications

Consider these pre-change communications and suggested timelines to promote buy in from senior leaders, identify and empower champions and prepare affected teams for the change. Larger organisations may require longer lead in times.

| Tactic | Weeks prior to go-live |
| --- | --- |
| Briefing to CEO/CFO and other executive senior leaders  Identify and appoint an executive eInvoicing sponsor (if not done already)  Confirm ownership of eInvoicing ongoing – especially for supplier and customer onboarding | 6 weeks |
| Roadshow for leadership teams  Get their support to identify potential ‘champions’ from their business area to support the rollout, as well as identifying and allocating the right operational resources, where required.  Prepare effected people for the change | 4 weeks and ongoing |
| Use blogs, email update and/or meetings/huis to reinforce messages on a regular basis | 3 weeks and ongoing |
| Engage People leaders  Help people leaders understand the things they need to know/do in their role to champion eInvoicing as people leaders | 2 weeks |
| Engage/train champions and super users  Invest in your champions and super users. They’re likely the most effective stakeholder in your organisation to drive success the success of eInvoicing | 2 weeks and ongoing |
| Engage/train affected teams  Use multiple channels, e.g. team meetings and intranet news items  Develop training or ‘how to’ guides  Enlist the support of the super users to support their peers | 2 weeks and ongoing |

### Pre-change tasks

Consider these non-technical implementation tasks to support implementation and your people to adopt the change.

| Task | When (pre or post go-live) |
| --- | --- |
| Add NZBN to customer and supplier records if not already captured:   * Customers – because this is the ‘delivery address’ for an eInvoice * Suppliers – some organisations use this unique identifier as a validation data point to ensure you identify and pay the correct supplier * Refer to section 2 of our eInvoicing Implementation Guide for further guidance * Gather lessons learnt | Pre |
| Understanding trading partners’ eInvoicing capability:   * Identify if your suppliers can send you eInvoices   + Use this intel to identify potential testing partners   + Use this intel for targeted communications - if your records indicate they’re not already sending you eInvoices   + Use this intel for reporting or benefit realisation purposes, or * Identify if your customers can receive eInvoices, so you know to send an eInvoice instead of emailing a PDF   + check list of [New Zealand businesses registered to receive eInvoices](https://www.einvoicing.govt.nz/assets/eInvoicing/nz-businesses-registered-to-receive-einvoices-november-2024.xlsx) – it’s updated monthly   + check the global [Peppol Directory](https://directory.peppol.eu/public)   + Use this intel for reporting (and/or benefit realisation) purposes * Ensure your systems is appropriately configured to capture the above? * Gather lessons learnt | Pre |
| Update or prepare training and other internal communications material:   * Update the [finance section of your intranet](#_Intranet_content_–) to include eInvoicing guidance * Update or develop new finance ‘how to’ guides (e.g. how to ‘read’ an eInvoice in your finance system * Prepare and schedule training for specific teams where required * Gather lessons learnt | Pre |
| Establish a ‘go-live’ customer care/hypercare team and support plan and develop and maintain issue resolution processes.  As with any major technology change there will be teething issues. It’s important to have people at the centre of the change. Ensure resources are available to support your people during this time. They should be available to provide support during the initial rollout and be available to:   * Triage and resolve technical issues * Support staff who receive, process, code or approve invoices * Identify, discuss and resolve issues * Support external suppliers/customers where needed | Go-live  Post |

### Prepare communications material

Communications material has been developed for you to adapt and use as appropriate for your organisation. These are included in the [appendix](#_Appendix_one:_Communication).

The table below outlines internal communications material to consider and repurpose.

| Item | Comments or timing |
| --- | --- |
| eInvoicing 101 presentation  Available on request.at [einvoicing@mbie.govt.nz](mailto:einvoicing@mbie.govt.nz) Personalise to your organisation’s situation. Use for:   * Leadership team meetings * Meetings with impacted teams, e.g. finance or accounts teams | Pre-change |
| Intranet content   * [Finance section](#_Intranet_content_–) (or consider a eInvoicing page as a one-stop place for all things eInvoicing)– what it is, instructions – what you need to provide to your supplier, guides for using finance system to code/process/review/approve; eInvoicing is your preferred channel for receiving invoices; available support * [News item – go live](#_Intranet_–_News) * News item – celebrate results | Go-live |
| Operational communications  To include in a regular finance newsletter or equivalent:   * Include eInvoicing related tips and tricks * Periodically have an ‘eInvoicing special edition’ to promote it and showcase success * Incorporate eInvoicing stats into BAU reporting | Go-live and ongoing |
| Communication to support supplier onboarding  Use email communication templates when you begin transitioning suppliers to eInvoicing   * [Emails to cost centre approvers](#_Internal_email_to), EAs, PAs, admin, commercial managers or project managers, prior to external communications deploying * Update [remittance](#_Additional_content_for) and [purchase order](#_Additional_content_for_1) advices that go to suppliers with content to promote preference to receive eInvoices * Update your website to reflect that you are ready to receive/send eInvoices and that eInvoicing in your preferred channel for exchanging invoices | Also see separate ‘[Supplier Communication toolkit’](https://www.einvoicing.govt.nz/assets/eInvoicing/einvoicing-communication-toolkit-getting-your-suppliers-ready-for-einvoicing.docx) and’ [Communication Toolkit for eInvoice senders’](https://www.einvoicing.govt.nz/assets/eInvoicing/einvoicing-communications-toolkit-for-invoice-senders.docx), for external communication template material |
| Consider messages for people leaders, Working group/Steering Committee  Report back messages to Working group or Steering committee to track progress, issues and feedback  Include an item in any channels or newsletters to your people leaders  Develop short key messages for leaders to cascade to their teams and their external customers /suppliers | Go-live and ongoing |
| Add an [email signature](#_Email_signature) that your organisation prefers to send/receive eInvoices | Download the eInvoicing capable badge from the [eInvoicing website](https://www.einvoicing.govt.nz/assets/eInvoicing/images/einvoicing-capable-badge-700x235.png) |

# Section 2 – Implement the change

### Roll out your change/communications plan

### Onboard suppliers and/or customers

It’s important to establish a deliberate focus on transitioning your suppliers and customers to eInvoicing, to maximise the benefit for your organisation. Considering setting targets for the next 12 months:

* The number of suppliers who send you eInvoices
* The number of customers who you send eInvoices to
* The number of eInvoices received or sent
* Percentage of eInvoices processed (compared to in-scope invoices)
* Processing/payment time of eInvoices compared to standard invoices.

|  |
| --- |
| PRO TIP  Apply focus to supplier and customer onboarding, early in your implementation  Request suppliers to send you eInvoices and advise customers you’ll be sending them eInvoices |

Below is a summary checklist of implementation tasks focused on your **suppliers**.

| Task |
| --- |
| 🞎 Communications to suppliers requesting eInvoices instead of PDFs:  🞎 Identify the key suppliers who you would like to send you eInvoices:   * + Start with high volume suppliers and/or low complexity invoice types   + Suppliers using Xero or MYOB to send PDF invoices can easily switch to eInvoices   + Suppliers known to be sending eInvoices to other organisations   + Start with these as a priority for onboarding, and then progressively add others to your onboarding list.   🞎 Let suppliers know you prefer to receive/only accept eInvoices (instead of PDFs), provide them with your NZBN and any invoice reference requirements  🞎 Provide clear instructions and support. Offer easy-to-follow instructions and assistance to help suppliers transition to eInvoicing  🞎 Update communication material/supplier contact points:  🞎 Consider offering incentives to encourage early adoption by suppliers  Resources:   * [Supplier Communication toolkits](https://www.einvoicing.govt.nz/assets/eInvoicing/einvoicing-communication-toolkit-getting-your-suppliers-ready-for-einvoicing.docx) * Use the [how to guide for searching Outlook for organisations using Xero and MYOB](https://www.einvoicing.govt.nz/assets/eInvoicing/how-to-guide-searching-outlook-for-organisations-using-xero-and-myob.pdf) - eInvoicing is available and free on these platforms * List of [businesses actively sending eInvoices](https://www.einvoicing.govt.nz/assets/eInvoicing/active-eInvoice-senders-to-government.xlsx) to government – quick wins * [List of businesses registered to receive – they probably can ‘send’ too](https://www.einvoicing.govt.nz/assets/eInvoicing/nz-businesses-registered-to-receive-einvoices.xlsx?vid=24) * [How to get started using Xero guide](https://www.einvoicing.govt.nz/assets/eInvoicing/getting-set-up-for-einvoicing-xero-business-edition-november-2024.pdf) * [How to get started using MYOB](https://www.einvoicing.govt.nz/assets/eInvoicing/getting-set-up-for-einvoicing-myob-business-essentials-account-right-november-2024.pdf) guide * [Event in a box](https://www.einvoicing.govt.nz/assets/eInvoicing/supplier-onboarding-in-person-event-in-a-box-resource.docx) resource (invite selected suppliers to attend a working session on how to send you eInvoices) * [Central Government invoice reference requirements guide for your suppliers](https://www.einvoicing.govt.nz/get-set-up/advice-for-government-agencies/advice-for-businesses-trading-with-government) |

Below is a summary checklist of implementation tasks focused on your **customers**.

| Task |
| --- |
| Communications to your customers about sending them eInvoices:  🞎 Let them know you prefer to, or will, send eInvoices instead of PDFs. Confirm their NZBN or ask them to confirm it is correct.  🞎 Consider one on one engagement for high value or large customers.  🞎 Update communication material and customer contact points  🞎 PDF invoices and statements – for those not yet receiving eInvoices from you. Include a message to say ‘we prefer to send eInvoices. Please provide your NZBN and advise if you can receive eInvoices’  🞎 [Email signatures](#_Email_signature) for those dealing with customers  Resources:   * [Communication Toolkit for eInvoice Senders](https://www.einvoicing.govt.nz/assets/eInvoicing/einvoicing-communications-toolkit-for-invoice-senders.docx) * [List of New Zealand businesses registered to receive eInvoices](https://www.einvoicing.govt.nz/assets/eInvoicing/nz-businesses-registered-to-receive-einvoices.xlsx?vid=24) |

# Section 3 – Embed the change

### Support and continue to reinforce the benefits of eInvoicing with your people, customers and suppliers

Hand over Customer Care/Hypercare and training to your BAU finance support teams. Include lessons learned. Ensure they are equipped to continue to support your people after the initial period of focused care has finished.

Like any behaviour change, or embedding a new way of working, regular repetitive messaging and reinforcement of the right messages and behaviours is recommended. Refresher training to cater for those who might need some additional support, or any newcomers may also be needed. Review and update your training materials and messages to incorporate any lessons learnt through your implementation, prior to handing it over to your BAU teams.

The table below outlines tasks to help embed the change.

| Task |
| --- |
| 🞎 Follow-up communications to your people:  🞎 Share progress  🞎 Lessons learned  🞎 Celebrate success  🞎 Encouragement/reinforcement to embed new behaviours (e.g. asking suppliers to send eInvoices instead of PDFs becomes the default) |
| 🞎 Monitor project plan and results against business targets |

### Continue to onboard suppliers and/or customers

Moving to eInvoicing is not a ‘one and done’ change. It will take time for suppliers and businesses to transition to eInvoicing - think about how long it took for people to move from cheques to internet banking. It is important to maintain momentum through consistent and regular supplier and customer onboarding activity.

Monitor your supplier/ customer’s onboarding experience closely and resolve any identified issues quickly to ensure a smooth transition and end-user experience – the smoother the experience, the greater the chance of ongoing adoption and use.

|  |
| --- |
| PRO TIP **The more eInvoices you send and receive, the more your organisation and your trading partners will realise the benefits of eInvoicing.** Allocate ‘supplier and customer onboarding’ resource (e.g. data analysis and communications specialist) to continually encourage more trading partners to exchange eInvoices with you. |

The table below outlines ongoing tasks to consider.

| Task |
| --- |
| 🞎 Follow-up communications to suppliers and customers to receive/send eInvoices will be needed as not all businesses will be able to send/receive from the outset but will transition to eInvoicing over time. Consider incorporating eInvoicing discussion or reminders at key engagement milestones e.g. at contract review or renewal time.  🞎 Suppliers: Remind them that you prefer to receive/only accept eInvoices (instead of PDFs), provide them with your NZBN and any invoice reference requirements  🞎 Customers: Remind them you prefer to/will send eInvoices instead of PDFs. Ask for their NZBNs if you don’t already have them |
| 🞎 Track the number of customers/suppliers sending/receiving eInvoices and the volume of eInvoices sent/received |
| 🞎 Check that the suppliers who are sending you eInvoices are sending all of their invoices as eInvoices – they may still be sending standard (PDF) invoices to some parts of your organisation |

### Tips from early adopters

🞎 Keep reinforcing the ‘why’ and ‘how’ of eInvoicing to your people, customers and suppliers.

🞎 The transition from emailed invoices (e.g. PDF) to eInvoices will take time. The speed of change is up to you and your plan to encourage trading partners to shift channels.

🞎 Regular communications and stats updates to the wider business can help to keep eInvoicing ‘top of mind’ and alive throughout the business.

🞎 This change won’t happen on its own – it is important that it is adequately resourced to ensure it can be effectively delivered and managed in a timely way.

🞎 Don’t forget to celebrate your progress and success!

# Appendices

### Appendix one: Communication templates

Adapt and tailor the following internal communication material as required for your organisation.

**eInvoicing 101 presentation**

Available upon request at [einvoicing@mbie.govt.nz](mailto:einvoicing@mbie.govt.nz)

#### Intranet content – finance page

**Invoices**

There are two ways that <name of organisation> can receive invoices from our suppliers - via email or eInvoice. We prefer to receive eInvoices where possible.

**What is an eInvoice?**

An eInvoice is the digital exchange of invoice information between any two finance systems.

Most businesses have access to eInvoicing capability. Suppliers can check the list at [Getting set up for eInvoicing | eInvoicing](https://www.einvoicing.govt.nz/software-providers/) to see if the software they use has eInvoicing capability.

With eInvoicing, the invoice information goes directly into our finance system and you won’t receive a PDF copy of the invoice. You can view the eInvoice in our FMIS.

To ensure we can receive and process eInvoices please ask the supplier to:

* Add our New Zealand Business Number (NZBN) into their contact records.
  + This will ensure any eInvoices they send reach us.
  + **<name of your organisation>’s NZBN is: <9429xxxxxxxxx>**
* Include the following on the invoice.
  + A purchase order number (*insert format requirement*).
  + *Add any other reference requirements here*

**Why eInvoicing?**

eInvoicing means there is no longer a need to generate paper-based or PDF invoices that have to be printed, posted or emailed, and we no longer need to manually enter these into our accounting system. eInvoicing improves accuracy and security in the invoicing process, reduces process time and therefore means our suppliers are paid faster.

**Where to get help**

If you or your team have suppliers needing help to send <name of organisation> eInvoices instead of emailing PDF invoices, refer them to <*email address of support team*>.

If you’d like to know more about eInvoicing, visit [Home | eInvoicing](https://www.einvoicing.govt.nz/)

#### Intranet – News item

**We’ve ditched PDF invoices and switched to eInvoices**

Along with thousands of other NZ <businesses/government agencies>, we’re prefer to <receive/send> eInvoices instead of emailing PDFs.

We recently went live with <receiving/sending> eInvoices <from/to> our <suppliers/customers>. <*maybe a sentence about when you expect to go live with send or receive if you’ve just gone live with one.>*

eInvoicing is the direct exchange of invoice data between suppliers’ and buyers’ financial systems – even if these systems are different – with no need for a PDF to be generated.

This is good for us as well as our suppliers and customers.

For our organisation it improves accuracy and security, reduces admin, and speeds up payments.

For our suppliers it means their invoices don’t get lost, and because it gets straight into our finance system there are no errors, it speeds up processing and we can pay them quicker.

For our customers they don’t need to manually enter our invoices into their system, reducing their admin and potential errors, saving them time.

#### Internal email to cost centre approvers, commercial managers, EAs, PAs, others as appropriate

Use this communication material when you are doing your external communications to suppliers.

* From your Finance Support Team or equivalent
* Deployment timing: Day on or before emails are sent to suppliers.
* Subject line: How you can support eInvoicing at <name of organisation>

Kia ora

**Did you know, <name of organisation> prefers to receive eInvoices instead of PDF invoices?**

eInvoicing is the digital exchange of invoice information directly between the supplier’s and the buyer’s (name of organisation’s) financial systems. This process works even if these systems are different, and it means the invoice information goes straight into our FMIS.

**Why eInvoicing?**

eInvoicing means there is no longer a need to generate paper-based or PDF invoices that have to be printed, posted or emailed, and we no longer need to manually enter these into our finance system. eInvoicing improves accuracy and security in the invoicing process, reduces process time and therefore means our suppliers are paid faster.

We are encouraging suppliers to send us eInvoices instead of emailing PDFs.

**<name of organisation> is requesting suppliers to send eInvoices – how does this impact you?**

Over the next <period of time>, <name of organisation> is contacting most suppliers encouraging them to start sending eInvoices or get ready to send them.

Next time you or your team request any goods or services from suppliers, please encourage them to send eInvoices instead of PDFs. Most businesses have access to eInvoicing capability. Suppliers can check the list at [Getting set up for eInvoicing | eInvoicing](https://www.einvoicing.govt.nz/software-providers/) to see if the software they use has eInvoicing capability.

To ensure we can continue to receive and process suppliers’ invoices in a timely manner (whether a PDF or eInvoice), also, please ensure suppliers are provided with:

* Our NZBN (this is the unique identifier that ensures eInvoices reach our FMIS):
  + **<name of organisation> NZBN for Departmental invoices is: 9429xxxxxxxxx**
* Include the following on the invoice.
  + A purchase order number (*insert format requirement*).
  + *Add any other reference requirements here*

eInvoices are automatically loaded into our FMIS. While you won’t receive a PDF copy of the invoice, you and any of your team who have access to FMIS, will be able to view the eInvoice within FMIS.

If you or your team have suppliers enquiring about needing help to get set up to send eInvoices, please refer them to <email address for your support team>.

Thank you for support on this initiative. Please share this with your team as appropriate.

#### Email signature

Get relevant finance teams to include the following in their email signature. If you are receiving eInvoices:



We prefer to receive eInvoices instead of PDFs. Add our NZBN to your contact records: NZBN xxxxxxxxx

Figure 1 Download image at https://www.einvoicing.govt.nz/assets/eInvoicing/images/einvoicing-capable-badge-700x235.png

If you are sending eInvoices:



We prefer to send eInvoices instead of PDFs. Let us know if your business can receive eInvoices, and your NZBN.

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#### Additional content for remittance advice

eInvoicing yet? <name of organisation> prefers to receive eInvoices instead of PDFs. Next time you invoice us send an eInvoice. Find out more at <external web address> and add <name of organisation>’s NZBN to your contact records:

* For departmental invoices: **9429xxxxxxxxx**
* For Crown invoices: **9429xxxxxxxxx**

#### Additional content for purchase order advice

<name of organisation> prefers to receive eInvoices straight into our system instead of PDFs.  Find out more at <external web address> and add <name of organisation>’s NZBN to your contact records:

* For departmental invoices: **9429xxxxxxxxx**
* For Crown invoices: **9429xxxxxxxxx**

**Frequently asked questions**

| Question | Answer |
| --- | --- |
| Do both the sender and receiver need to be registered for eInvoicing? | No, you only need to register to receive eInvoices. However, both parties do need to use software that is connected to the eInvoicing network for it to work. |
| How do I know if my suppliers can send me eInvoices (now that we can receive)? | There are more than 55 eInvoicing software ready products available to businesses, including Xero and MYOB. So, hundreds of thousands of businesses have access to eInvoicing capability.  Check the list of businesses registered to receive eInvoices – they’re likely to be able to send too.  Remember, your supplier analysis will be able to identify which suppliers use Xero and MYOB. |
| Does eInvoicing meet IRD’s tax invoice and record keeping requirements. | Yes, check their website for details.  IRD also prefer to receive eInvoices from their suppliers. |
| What is the cost of eInvoicing for my suppliers? | Most small business accounting and finance software provide free eInvoicing capability.  In many cases it’s part of their accounting package subscription. So, generally there is no additional cost burden on your small suppliers.  For large businesses the cost will vary depending on the maturity of their system. |

**Need more information for your teams?**

Email us at [einvoicing@mbie.govt.nz](mailto:einvoicing@mbie.govt.nz) to get answers for any frequently asked questions by your people that are not answered in this document.

1. Electronic Data Interchange (EDI) is the computer-to-computer exchange of business documents in a standard electronic format between business partners [↑](#footnote-ref-1)
2. Further advice on how to speed up payment times is outlined in the [Payment Times Factsheet](https://www.einvoicing.govt.nz/get-set-up/advice-for-government-agencies/improving-payment-times#payment-times-factsheet). [↑](#footnote-ref-2)