Questions and Answers on eInvoicing in New Zealand with Xero and MYOB

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Q: Does that mean that we would need the NZBN of the business and that they are signed up to use einvoicing? Is there an easy way to find out if the business is signed up for einvoicing?

A: That's right. You can look up if a business is registered (on the Peppol directory) to receive eInvoices, or simply ask them. The list of businesses is published on the eInvoicing website and updated each month. Home | eInvoicing

Q: Do we need to know the NZBN of our customers and enter it manually in Xero on the contact setup?

A: Yes, you'll need to pop your customers NZBN in your customer's contact card.

Q: How do we inform Xero and MYOB of our NZBN number.

A: In Xero, you'll need to pop your NZBN in the organisation settings. In MYOB, you can set your company's NZBN in the Business Settings.

Q: Can I preview the eInvoice in PDF format prior to sending?

A: In Xero, you can preview the PDF prior to sending. MYOB allows you to see a preview of the PDF prior to sending the eInvoice. You can choose the invoice template and preview the PDF prior to sending the eInvoice in MYOB. You should find a "Preview PDF" button in the eInvoicing pop-up.

Q: Can you deregister?

A: Yes, In Xero and MYOB you can de-register. Given you can only be registered with one access point at a time, if you want to move from MYOB's offering to another one, our support team can assist you in de-registering. In Xero, you can de-register from the manage eInvoicing section in the bills over flow menu.

Q: Does the client get a notification that they have an einvoice to verify and pay?

A: in Xero, there are no notifications for incoming eInvoices, incoming eInvoices automatically appear in Xero as a draft bill. In MYOB, that new document will appear in their InTray with an "eInvoice icon", but there is no active notification to let them know there is something new there.

Specific questions relating to eInvoicing though Xero

Q: I assume we need to be using New Sales Invoicing in Xero?

A: Yes, you can only send eInvoices via New Invoicing.

Q: If a client is using an APP, eg Vend / Lightspeed for purchases and sends the Bill through to Xero from there how will it work in Xero?

A: If you have an existing process that works for you, you should continue to use it. However, you can also operate in parallel with some invoices coming into Xero and others into the inventory system.

Q: Xero added the payment details, this is saved in PDF templates does this not transfer across to the eInvoice?

A: When sending an eInvoicing in Xero we provide the option to send the bank account details. We suggest that Xero users select the bank details that appear on their invoice template.

Q: How is this better than bill to bill in Xero or email to bills?

A: Xero to Xero is for Xero business exchanges only. eInvoicing means that it doesn't matter which software you customer is using. eInvoicing is more automated than mail to bills and ensures all your data is accurate as it's a software to software transfer that doesn't rely on OCR technology.

Q: How will it work with Hubdoc?

A: Once you've registered to receive eInvoices in Xero you will need to transfer them to hubdoc if you wish to have them in hubdoc.

Q: If we invoice in bulk do we need to approve and send the einvoice ones separately, in Xero.

A: At this point in time you can not bulk eInvoice from Xero.

Q: If there is a purchase order in the system already, is there any way of matching the invoice to the PO?

A: No automatic way to match. But you can include the PO number in the reference field in Xero.

Q: What about when we receive your bills for subscriptions for Xero and MYOB.

A: We are trialling Xero subscriptions via eInvoicing at the moment, watch this space. This is not currently possible for MYOB.

Q: Can eInvoicing be sent from WorkflowMax and from Xero Practice Manager or just in Xero?

A: eInvoices can only be sent from Xero at this point in time.