



# Management Portal



Contact

Laura Kluijtmans

[laura@money-phone.com](mailto:laura@money-phone.com)

## Contents

MoneyPhone Introduction.....	2
View loan details.....	2
Export a loan to Excel.....	3
Create a new loan.....	4
Approve a loan application.....	6
Sync the loan details with Musoni.....	6
Report an issue.....	7

## MoneyPhone Introduction

People can apply for a loan on this website:

[Eduloan Apply Staging | MoneyPhone \(money-phone.com\)](#)

As soon as the form on this page is submitted, the loan application will appear in the management portal. People with access to the management portal can see the loan details at all times when connected to the internet.

## View loan details

Use your personal credentials to log in on the management portal

[Management Console | Management Console \(money-phone.com\)](#)

1. Click **View loans** to see an overview of the loans
2. Click the **ID** of a loan to open the loan

Select loan to change

<input type="checkbox"/>	ID	DATE CREATED	FIRST NAME	PHONE	LOAN PURPOSE
<input type="checkbox"/>	200	May 21, 2021, 1:23 p.m.	Jean paul	250788298354	Business
<input checked="" type="checkbox"/>	199	May 13, 2021, 10:41 p.m.	Chryssoula Doa	31624802383	Business

3. Scroll down to see all loan details

To view the intake details, scroll down to the section **Intake** and click on **Change**.

Loan terms (Show)

Recommendations (Show)

**INTAKE**

ID	DATE CREATED	DATE UPDATED	I AGREE	IS COMI
Intake object (103) <span style="background-color: yellow;">Change</span>				
103	June 3, 2021, 12:03 p.m.	June 3, 2021, 12:38 p.m.	I agree	<span style="color: green;">✔</span>

Here you find all information the applicant entered into the intake form.

Change Intake information

HISTORY

Delete

Save and add another

Save and continue editing

SAVE

Applicant Information (Show)

Identification Information (Show)

Student's Details (Show)

Income details (Show)

references (Show)

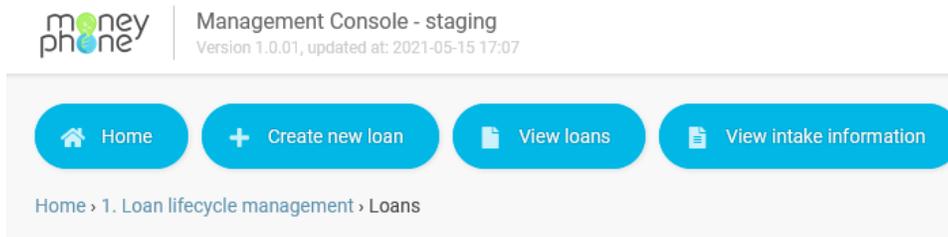
It is also possible to change the information in the form. For example when the applicant made a mistake and wants to change something after submitting, you can make the change for the applicant in the management portal. All changes being made are logged and can be viewed in the History.

## Export a loan to Excel

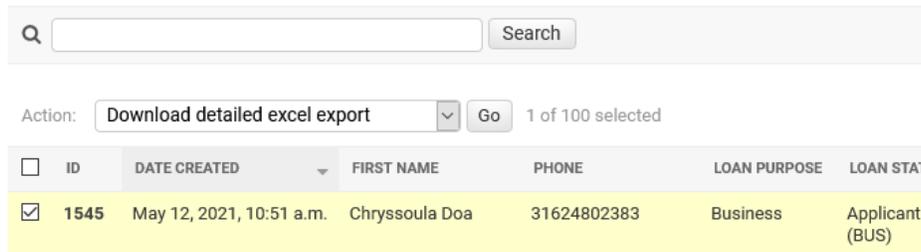
Use your personal credentials to log in on the management portal

[Management Console | Management Console \(money-phone.com\)](#)

1. Click **View loans** to see an overview of the loans
2. Select the loan you want to export



Select loan to change



3. Select **download detailed excel export** in the drop down menu in the action list
4. Click **Go**
5. Click on the URL of the excel file

The file starts to download. Click open file to view the file or go to your downloads folder.

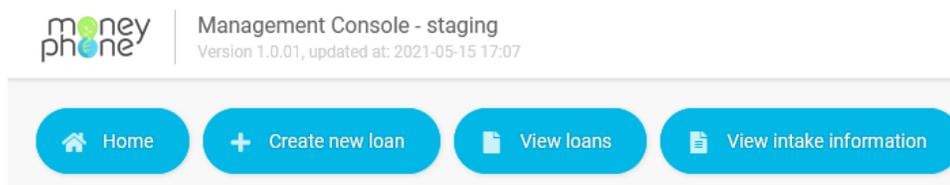
## Create a new loan

It is possible to create a new loan in the Management Portal, without applying on the website. Loan officers can create new loan applications for applicants when desired.

Use your personal credentials to log in on the management portal

[Management Console | Management Console \(money-phone.com\)](#)

1. Click **Create new loan**



2. Enter Name and phone number of the applicant

## Add Loan

Full name:

---

Phone:

international extension without leading 0, e.g. 96277032883

---

[SAVE](#)

3. Click **Save**
4. The new loan is created
5. Click **View Loans** to see the new loan created
6. Click on the **ID** number of the loan to open it
7. Scroll down to enter the loan **Amount**

**Final Signing Applicant (Business loans only)**

Agreement review:

---

Amount:

Total fees:

---

Repayment period:

---

I agree:

Final signature loan:

---

8. Click **Save and continue editing**

Change loan [HISTORY](#) [PREV. LOAN](#) [NEXT LOAN](#)

---

[Delete](#)
[Save and add another](#)
[Save and continue editing](#)
[EXPIRE LOAN](#)
[OUTSTANDING LOAN](#)
[REJECT LOAN](#)
[WITHDRAW LOAN](#)
[SAVE](#)

9. Scroll down

10. Click on the **User link** to open the loan application, or copy this link and send it to the applicant.

Loan state:	draft	Date created:	May 15, 2021, 5:23 p.m.	Date updated:
User link:	https://staging-apply.money-phone.com/a/RtLJ23pxSLO8RZtjg1EMvQ/J0QcfcbsbYTIJlJNfBbWKA9y5WMH9EA?lang=ar			

## Approve a loan application

Once the applicant has submitted the intake form, you can approve the loan application.

1. Click **View loans** to see an overview of the loans
2. Click the **ID** of a loan to open the loan
3. You can review the loan details and applicant information
4. If you decide to grant the loan, click on Approve application loan

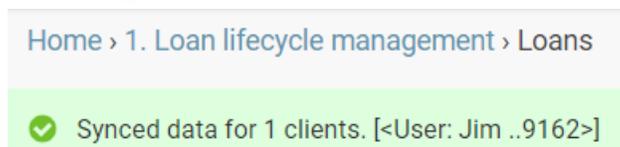


The applicant will now receive a WhatsApp message containing a link to sign the loan contract.

## Sync the loan details with Musoni

For each loan, the loan details can be synced with Musoni. You can then use Musoni for loan disbursement and repayments.

1. Click **View loans** to see an overview of the loans
2. Select the loan you want to sync with Musoni
3. Select **Sync client with Musoni** in the drop down menu
4. Click **Go**
5. A message will appear to inform you that the syncing was successful



6. The loan details can now also be viewed in Musoni (Loan product RBZ or Educational MoneyPhone, pending approval)

## Report an issue

If you are having trouble working with MoneyPhone, please let us know. We are there to assist you. Feel free to send an e-mail to: [info@money-phone.com](mailto:info@money-phone.com)