Management Portal

[redacted]

Contact

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Contents

MoneyPhone Introduction

People can apply for a loan on this website:

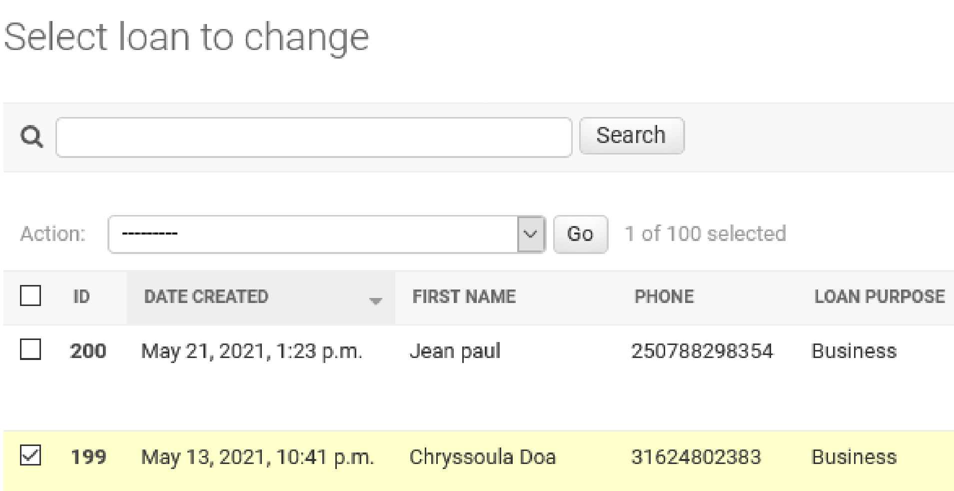
Eduloan Apply Staging | MoneyPhone (money-phone.com)

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)

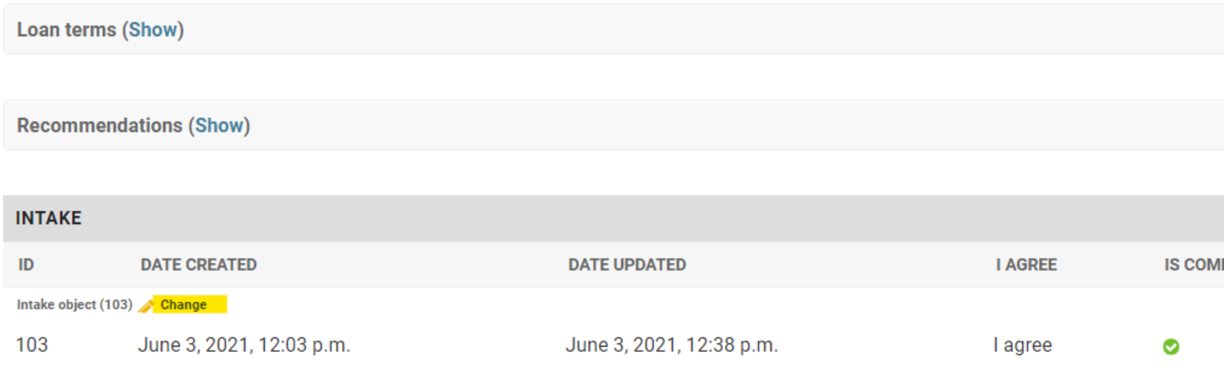
1. Click **View loans** to see an overview of the loans
2. Click the **ID** of a loan to open the loan



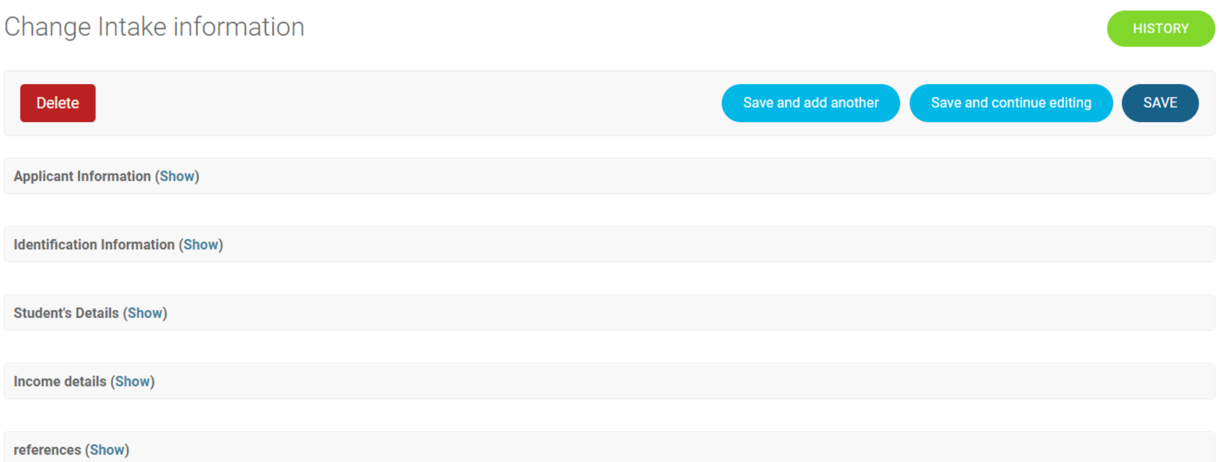
	ID	DATE CREATED	FIRST NAME	PHONE	LOAN PURPOSE
☐	200	May 21, 2021, 1:23 p.m.	Jean paul	250788298354	Business
☑	199	May 13, 2021, 10:41 p.m.	Chryssoula Doa	31624802383	Business

3. Scroll down to see all loan details

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



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

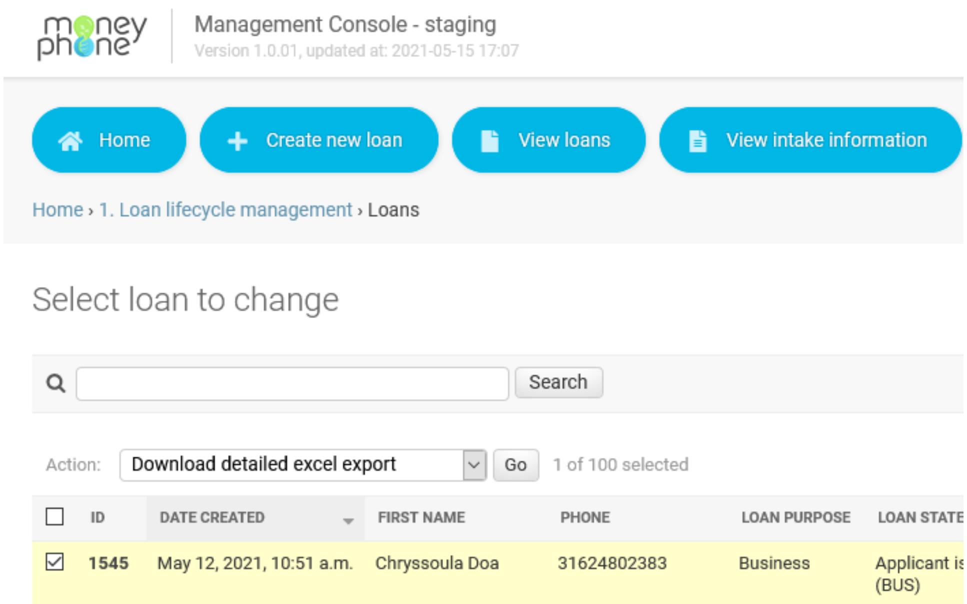


It is also possible to change the information in the form. For example when the applicant made a mistake and wants to change something after submitting, you can make the change for the applicant in the management portal. All changes being made are logged and can be viewed in the History.

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



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

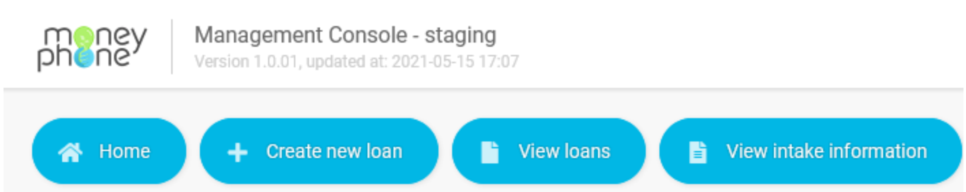
The file starts to download. Click open file to view the file or go to your downloads folder.

Create a new loan

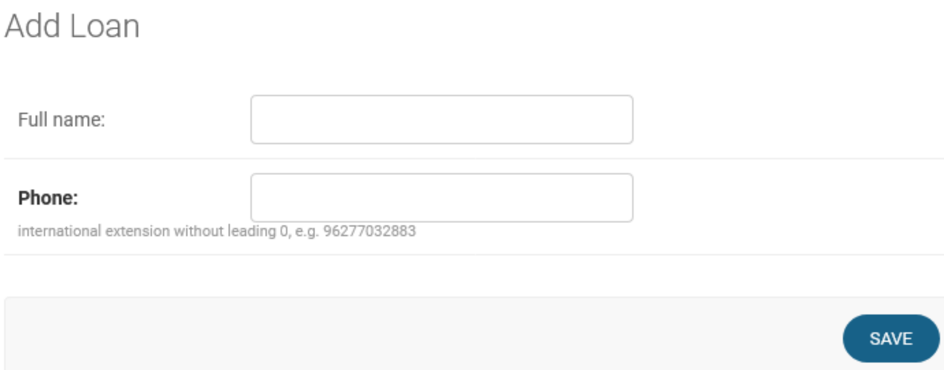
It is possible to create a new loan in the Management Portal, without applying on the website. Loan officers can create new loan applications for applicants when desired.

Use your personal credentials to log in on the management portal [Management Console | Management Console (money-phone.com)]

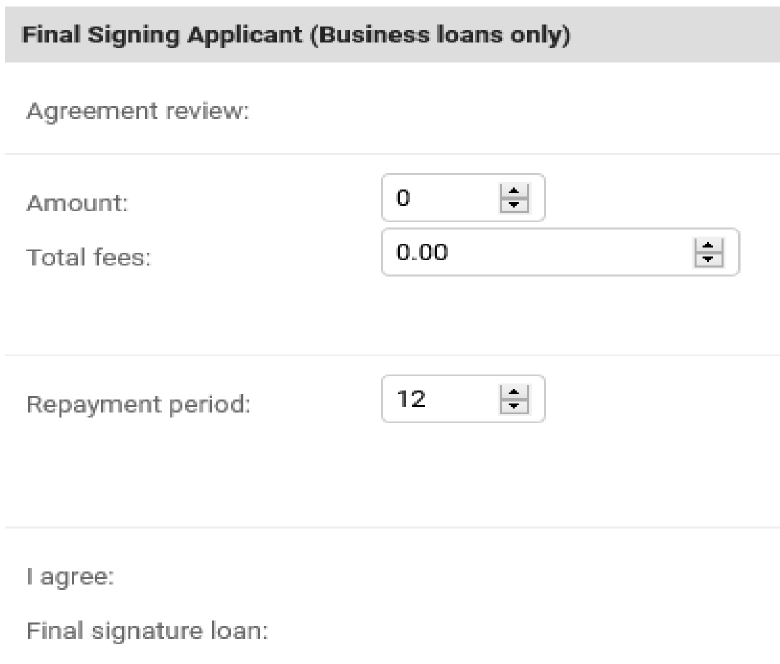
1. Click **Create new loan**



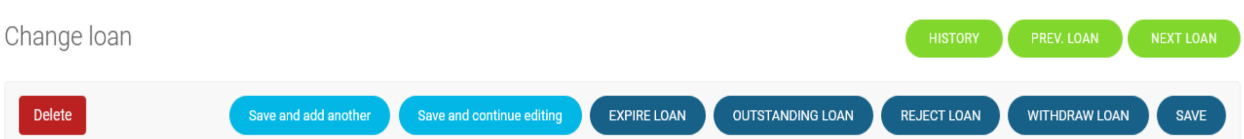
2. Enter Name and phone number of the applicant



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**

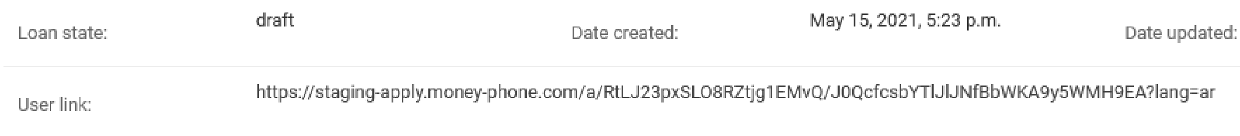


8. Click **Save and continue editing**



9. Scroll down

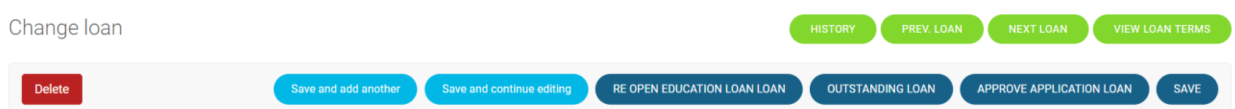
10. Click on the **User link** to open the loan application, or copy this link and send it to the applicant.



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

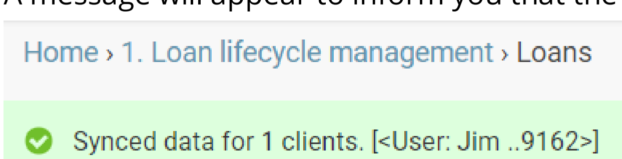


The applicant will now receive a WhatsApp message containing a link to sign the loan contract.

Sync the loan details with Musoni

For each loan, the loan details can be synced with Musoni. You can than 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