



**MediPlan**  
A zipMoney Company

# **Merchant Dashboard Training Guide**

# Product Offering for patients

- Credit Limit \$5,000, \$10,000 or \$15,000
- Int. Free Term 6 or 12 Months Interest free
- Monthly Service fee \$4.95 Monthly fee
- Standard Annual % Rate 14.9% - 23.9% (post interest free period)  
(only payable if balance owing)
- Minimum Monthly Repayment 3% or \$40  
(whichever is greater) of balance owing

# Customer Qualification

- 18+ years old
- Australia citizen or resident
- Employed
- Earns more than \$300 per week
- Active Email Address
- Active Mobile Number

## Not sure if your Customer Qualifies?

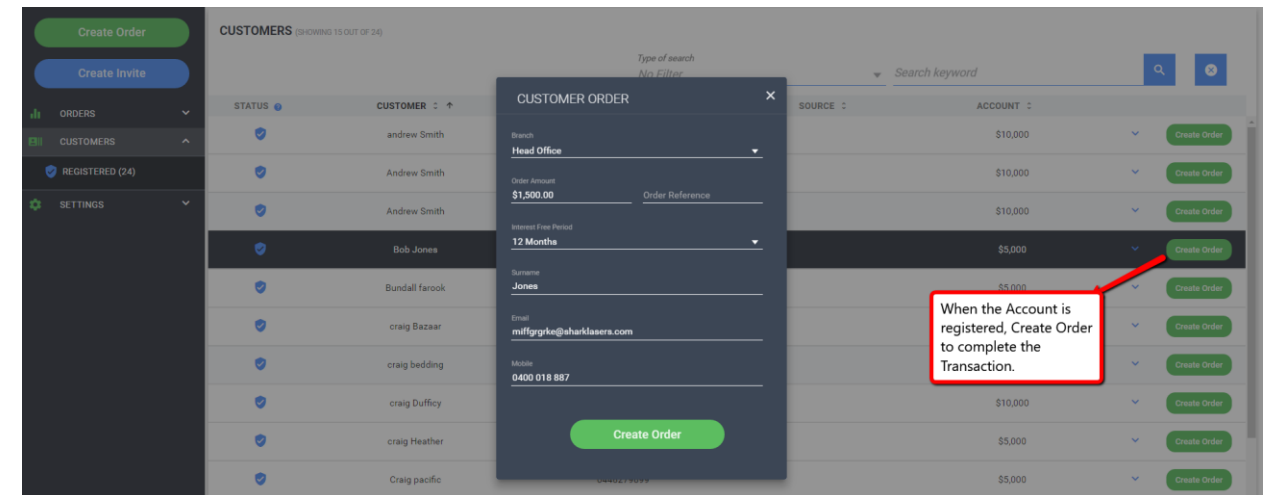
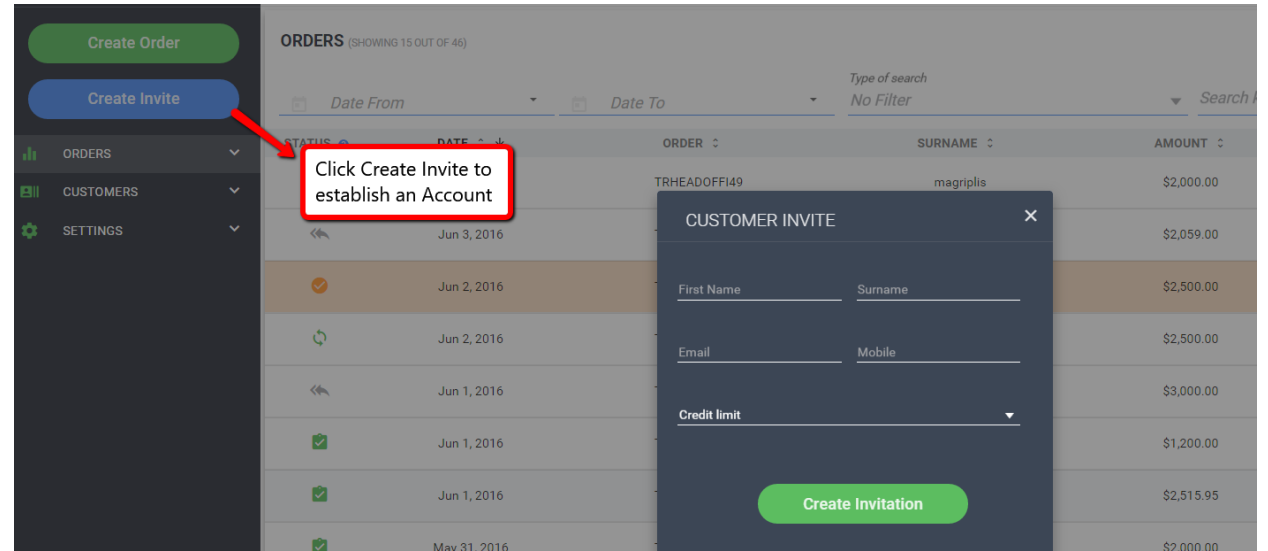
Contact Mediplan on:

Customer Care: 02 8294 2345  
or  
Email [info@mediplan.com.au](mailto:info@mediplan.com.au)

# Application

When you have a qualified patient and they are interested in paying for the procedure with Mediplan (new and existing Mediplan Customers):

1. Click, **“Create Invite”** via the dashboard and input the Customers details. An instant application link is sent to their mobile phone in a text and email.
2. The customer will click on the link and complete an application. The application process takes 3-5 minutes from start to finish.
3. Once approved and the invoice amount has been determined, an order can be placed by clicking on **“Create Order”** in the Customer List. Enter the customer details and click **“Complete Order”**.
4. The customer will receive a text requesting them to login and authorise the transaction.
5. If the exact amount has been determined, you will only need to **“Create Order”** and a credit limit will be assigned.



# Completing the ORDER – Authorising Payment

When your patient/customer is Approved, to finalise the order you must complete this in your Mediplan dashboard.

1. Login into the Mediplan dashboard
2. The home screen defaults to the orders page where all customers orders are listed. Once the patient has registered their Mediplan account, the STATUS for the order changes to Authorised.
3. To process the same day payment\*, click **COMPLETE**.
4. Click **COMPLETE ORDER**

Training / HEAD OFFICE ADMINISTRATOR SYSTEM

ORDERS (SHOWING 15 OUT OF 75)

\$1,345 (1) TODAY   \$4,079 (3) LAST 7 DAYS   \$52,601 (29) LAST 30 DAYS   \$4,199 (3) AUTHORISED

Date From   Date To   Type of search: No Filter   Search keyword

STATUS	DATE	ORDER	SURNAME	AMOUNT	REFERENCE	
	Jun 28, 2016	TRHEADOFF101	Smith	\$1,234.00	678	
	Jun 28, 2016	TRHEADOFF100	Martin	\$800.00	1234	<b>Complete</b>
	Jun 28, 2016	TRHEADOFF199	jhkjh	\$1,000.00	uiyi	
	Jun 27, 2016	TRHEADOFF198	Smith	\$1,500.00	smith	

STATUS symbol – **“Authorised”**. Explanation of symbol by hovering mouse on symbol.

All done. A disbursement advice will be sent to your email within 24 hours.

\*Orders authorised by 3pm will be paid same day. Post 3pm, payment will be made the next business day.

# Returning Patients/Customers

The screenshot displays the zipMoney dashboard interface. On the left, a dark sidebar contains navigation options: 'Create Order' (green), 'Create Invite' (blue), 'ORDERS' (with a dropdown arrow), 'CUSTOMERS' (with an up arrow), and 'REGISTERED (7)'. The main content area is titled 'Thermomix / THERMOMIX NSW' and shows a 'CUSTOMERS' list with columns for CUSTOMER, MOBILE, SOURCE, ACCOUNT, and STATUS. A search bar at the top right of the list area is labeled '2.' and contains the text 'Type of search No Filter' and 'Search keyword'. A 'CUSTOMER ORDER' modal form is overlaid on the list, labeled '4.', with fields for 'Order Amount', 'Order Reference', 'Surname', 'Email', and 'Mobile', and a 'Create Order' button. A '3.' label with an arrow points to the 'Create Order' button in the table. A '1.' label with an arrow points to the 'CUSTOMERS' tab in the sidebar. A 'Create order button' label with an arrow points to the 'Create Order' button in the modal form.

**You can process an additional ORDER for an existing customer via your dashboard**

1. Click on Customer Tab
2. The search function allows you to search by Surname, Email, Mobile or reference
3. When you have located your patient, click on the **Create Order** tab on the far right of the screen.
4. Enter the order amount, order reference, surname, email and mobile number. Click **Create Order**.
5. This will send a notification via SMS and email to Login to their account and accept the transaction.
6. Once accepted, the new order will appear as Authorised on the ORDERS page accessed via the left hand column option.
7. Click on **COMPLETE** order button. Payment will be made that day if completed by 3pm.

1.

2.

4.

3.

Customer page

Create order button

Orders page

## Your Mediplan Status

This is the list of order statuses you will see in the Dashboard and what action is required. All statuses are updated in your dashboard as an action is completed by the Customer, Mediplan or the Clinic.

Status	Description	Action
IN PROGRESS	The customer has begun their application or transaction and is in the process of completing it.	No action required
CONTRACT PENDING	The customer has been approved but has not yet accepted their contract. There will be a link in the approval SMS to complete this step	No action required
UNDER REVIEW	The order is under review and a decision will be made within 10 minutes	No action required
AUTHORISED	Mediplan has approved the transaction. Order can now be placed in the Dashboard.	Order submitted as per previous slide. Patient receives text message requesting authorisation. Once authorised, Click the COMPLETE button.
COMPLETED	The order is complete and the customer has been registered	Customer order is complete and disbursement to clinic will be completed.
DECLINED	Mediplan has declined the transaction	Customer should use another payment method.
CANCELLED	The transaction has been cancelled by either the merchant or Mediplan.	Do nothing
REFUNDED	The order has been refunded. All refunds can be managed by you.	Do nothing

# Application Process for the Patient - Verification

**Secure bank verification** [Learn more](#)

zipMoney will **securely connect** to your bank to receive a **read-only copy** of your bank statement allowing us to provide you with a **faster decision**.

Select your bank...

**Norton SECURED** **McAfee SECURE**

This form uses bank level 128 bit SSL encryption

If you prefer you can upload your most recent bank statement.

[Upload your statement here](#)

zipMoney's Bank Verification Service is powered by [Yodlee](#), and is used by over 600 leading global financial institutions.

**2 minutes from a decision**

1 Your Details 2 Verify Bank 3 Complete

**Your Shopping Cart**

Items	\$2,089.00
Shipping	\$0.00
<b>Total</b>	<b>\$2,089.00</b>

There is a one-time fee of \$25 for establishing your account.

[Cancel and return to store.](#)

**Your Security**

- Bank Level Encryption ✓
- Secure Login ✓
- Read-only service ✓
- One-time connection ✓

Need some help?

- [Live chat](#)
- 1300 947 729
- [support@zipmoney.com.au](mailto:support@zipmoney.com.au)

**Upload your file(s)**

Maximum file number: 3 file(s).  
File types: pdf, jpg, png, jpeg, bmp, gif.

Drop files here or [Browse...](#) (Max 5MB)

[Upload All](#) [Delete All](#)

For Mediplan to approve the credit limit, instead of asking the customer to provide copies of documentation (payslips, bank statements, ID. Etc.), we ask them to securely login to their bank account to complete an instant bank verification.

## Options

- The applicant selects their bank and enters their Customer ID & Password
  - We do not store any account log-in details.
- Applicant uploads a statement: PDF bank statement, screen shot from mobile or scanned paper statement. If the bank is not listed, the customer is instructed to use this method.
- Contact Mediplan to discuss/troubleshoot any issues on 1300 1300 12 or

# Mediplan Key Contacts....

## Patients

Our Customer Care team is available to help with any query.



02 8294 2345



[info@mediplan.com.au](mailto:info@mediplan.com.au)

## Clinic (you)

Our support team is available by phone and email for your business needs.



1300 1300 12



[Eli.Hecht@mediplan.com.au](mailto:Eli.Hecht@mediplan.com.au)