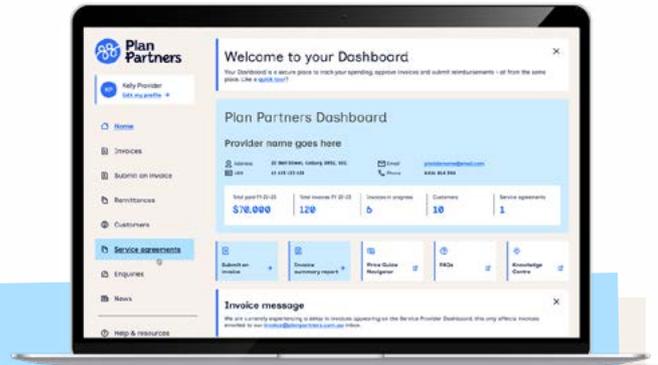


Quick Guide to your Dashboard



Plan Partners' Online Dashboard gives Service Providers total account transparency, 24/7.

Your Dashboard is available on all major devices, including mobile, iPad and tablet, so you have 100% flexibility wherever you choose to view it. It's full of great time-saving features that you can use to get easy invoicing, fast payments, and the latest NDIS info and tips.

Read on for our quick guide to just some of the features of our Dashboard.

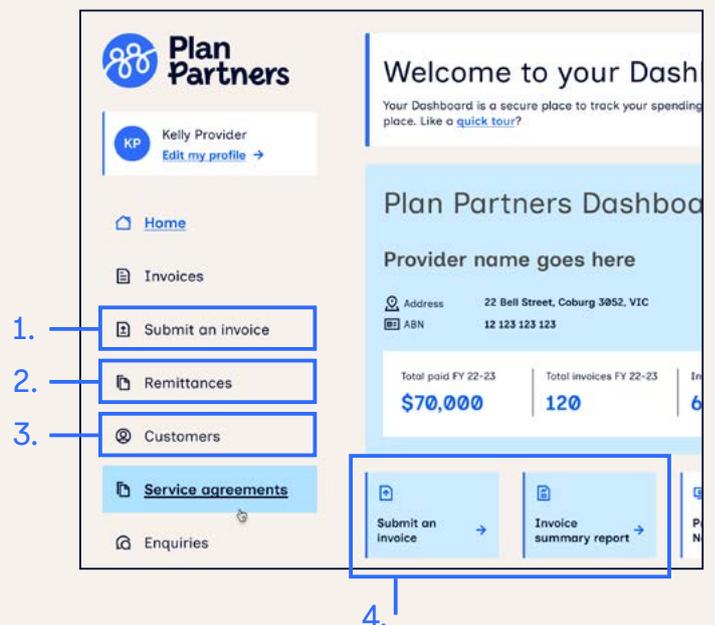
With features that make your NDIS journey easier, including:

- Create invoices from ready-made templates generated straight from your Dashboard.
- See detailed live statuses for invoices, including any action needed.
- Access remittances for invoices, paid by us, to easily reconcile accounts.
- View service agreements you have in place with Plan Partners' customers.

Easy Navigation

A handy navigation bar helps you find your way round your Dashboard easily.

1. Create and submit invoices quickly and easily.
2. Access remittances for payments processed with us - super handy for reconciling your accounts.
3. Access customer details easily, including any service agreements you have in place with them.
4. Handy quick links to access our resources throughout your Dashboard including an invoice summary report.



Easily create and submit invoices

Create and submit invoices quickly and easily.

1. Have your own invoice ready? Just upload it to the Dashboard and we'll take care of the rest.
2. Create invoices from ready-made templates (created by you) in a fraction of the time!

Submit an invoice

Choose how you would like to submit your invoice.

Quick and easy invoice uploader
Have your own invoices ready? Simply upload it in PDF format and we'll take care of the rest. Invoices over \$1,500.00 must be submitted here.
[Upload invoice](#)

Create an invoice under \$1,500.00
No invoice system? Need to create one while on the go? No problem. Build an invoice up to the value of \$1,500.00 and submit it all in one place.*
[Create an invoice](#) [Create from template](#)

* If the invoice you create is over \$1,500.00 you will be required to upload a PDF copy of your companies invoice.

Invoice details - applies to both options

1. 2.

A history of all your invoices processed with us

Every invoice, tracked in real time, so you're always up to date.

1. Detailed live statuses, so you know exactly where your invoice is in the processing cycle.

1.

Invoices [View more invoices](#)

Search Customer name Status Invoice date from Invoice date to

Invoice number	Customer name	Date	Status	Date Paid	Total	Action
1234	Customer name	24 July 2022	Awaiting customer approval	-	\$ 100.00	View details
1234	Customer name	24 July 2022	Cancelled	-	\$ 100.00	View details
1234	Customer name	20 July 2022	Paid	24 July 2022	\$ 100.00	View details

All the detail, whenever you need it.

2. View your invoices as they get processed in real detail, including if any action is required.

2.

Plan Partners Home / Invoices / Invoice details - 123 456

Invoice details Invoice status [Processing payment](#)

Customer name here
NDIS number 987654321

Invoice Number **123 456**
Invoice Date **04 Dec 2024** Paid Date

Invoice progress

[Processing payment](#)

This invoice has been successfully approved and payment is expected within 24 hours. Just remember, payment can take up to 2 days to process.

Email
info@planpartners.com.au

Call us
1300 333 700

Live chat
planpartners.com.au

