

Plan Access Vendor Onboarding Guide

Contents

1. Introduction	3
2. Creating Your Vendor Account	3
3. Setting Up Your Store	3
4. Product Management	4
5. Order Management	5
6. Payment and Shipping	5
7. Support and Resources	5
8. Frequently Asked Questions (FAQ)	6
9. Vendor Information	7

1. Introduction

Welcome to Plan Access! We are thrilled to have you join our community of vendors. This guide will help you understand the onboarding process, familiarise you with our platform, and ensure that you can effectively set up and manage your store.

Key Features of Our Marketplace:

- Customisable storefronts
- Built-in payment processing
- Comprehensive order management

2. Creating Your Vendor Account

Step 1: Registering

- a) Go to www.planaccess.com.au
- b) Click on the "**Become a Seller**" button on the home page or click on '**Register a seller**' on the footer
- c) Fill in the required information:
 - First Name
 - Last Name
 - Email Address
 - Organisation Name
 - Vendor Type
 - ABN Number
 - Provider Number *(for NDIS vendors)*

Step 2: Account Verification

Once you register, you will receive an email for account verification. Click the verification link in the email to activate your account.

Step 3: Vendor Agreement

Read and accept our vendor agreement outlining the terms and conditions of selling on our marketplace.

3. Setting Up Your Store

Step 1: Access the Vendor Panel

Log in to your account and navigate to the vendor panel.

Step 2: Set up / Verify your profile

Under the Set up your profile step, click on the '**Go to your profile**' button and fill in the details.

Step 3: Set up the store information

Click on the vendor's name at the top left-hand corner and select '**Seller info**'

- Organisation Name

- Store Description
- Logo Upload
- Cover Image

Step 4: Configure Store Settings

- a) Click on the vendor's name at the top left-hand corner and click on 'Seller info'
- b) Set up your store policies:
 - ✓ Return Policy
 - ✓ Shipping Policy
 - ✓ Payment Methods
 - ✓ Contact Information

Step 5: Add your NDIS login details (If Applicable)

- a) Log in to your vendor account and go to the seller information section.
- b) Click on the "NDIS API Login Details" tab.
- c) Set the **NDIS API Mode** to "Live", then enter the username and password provided by the Plan Access team.

4. Product Management

Step 1: Adding Products

- a) Navigate to the "Products" section in the vendor panel.
- b) Click "Add Product" and fill in product details:
 - ✓ Name
 - ✓ Categories
 - ✓ Price
 - ✓ Description
 - ✓ Images

Step 2: Categories

Assign products to relevant categories to help customers find them more easily.

Step 3: Product Variations

If you have different sizes/colours, use the product variations option to provide detailed options to customers.

Step 4: Support Item Allocation

- a) Click on the **NDIS Product Details** tab
- b) Select the relevant purchase Type for the product
- c) Click on the Hamburger Menu select the relevant NDIS Item Name and Support Category Item Name and Save the details.

Note: The support item code must match the product listed it is the responsibility of the vendor to ensure compliance with the NDIA's requirements.

5. Order Management

Step 1: Viewing Orders

- a) Access the “Orders” section to view incoming orders.

Step 2: Order Processing

- b) Update the status of orders as they are processed (e.g., pending, shipped, completed).
- c) Ensure you fulfil orders promptly to maintain customer satisfaction.

Step 3: Returns and Cancellations

- d) Manage returns and cancellations according to your store's policies.

6. Payment and Shipping

Step 1: Payment Methods

- e) Click on the vendor’s name at the top left-hand corner and click on Seller info
- f) Scroll down to the **Stripe Connect Section** and connect your Stripe account.

Step 2: Shipping Options

- g) Click on the settings on the left-hand menu and select Shipping methods.
- h) Choose shipping carriers and methods. Configure rates based on product weight, dimensions, and destination.
- i) You can also set up Rate areas and Stores & pickup points details.

Step 3: Taxes

- j) Configure tax settings under additional settings in the shipping method you created according to local regulations.

7. Support and Resources

Vendor Support

- For questions and assistance, contact our support team at info@planaccess.com.au.

Knowledge Base

- Access our knowledge base for detailed articles, video tutorials, and best practices for selling on the platform.

Customer Support

- Click on the Message Centre on the left-hand side menu to view customer communication and Admin Communications.
- You can respond to customer inquiries directly through the customer communication section.

Accounting

- You can view all the transactions and balance withdrawals through the Accounting section in the menu bar.

8. Frequently Asked Questions (FAQ)

1. ***What is Plan Access, and how does it work for vendors?***

Plan Access Marketplace is an approved Australian E-commerce platform owned by Care Access that allows NDIA-approved third-party sellers to sell their products on the Plan Access marketplace.

2. ***How do I become a vendor on Plan Access?***

To become a vendor, you need to create an account on the platform, provide necessary details about your business, and go through an approval process before you can start selling.

3. ***What information do I need to provide during onboarding?***

You will need to provide your business details, and NDIS registration details (if applicable).

4. ***How do I list my products on Plan Access?***

Once approved as a vendor, you can list your products by uploading product descriptions, prices, images, and any required NDIS-related information through your vendor dashboard.

5. ***How do I manage my inventory on Plan Access?***

You can track your inventory, update product quantities, and manage stock levels directly through your vendor dashboard.

6. ***How do I handle orders and shipments?***

After receiving an order, you will be notified through your vendor dashboard. You are responsible for fulfilling and shipping the order promptly. You can update the order status as you process and ship them.

7. ***What support is available for vendors?***

Plan Access offers support through various channels including email, chat, and phone. Vendors can also access guides, FAQs, and troubleshooting help on the vendor portal.

8. ***Can I use my own payment gateway or do I need to use Plan Access' payment system?***

Plan Access uses its own payment system to ensure secure and seamless transactions. Vendors are required to use this system for processing payments.

9. ***What should I do if my business details change?***

If your business details change (e.g., address, contact information), you can update them in your vendor account. Notify Plan Access immediately if your NDIS registration status changes.

10. ***How do I get my products featured on Plan Access?***

Plan Access may feature products based on specific criteria. Vendors can contact support for promotional opportunities or participate in marketing campaigns.

9. Vendor Information

Please be aware that all products provided must meet the Reasonable and Necessary Criteria. Additionally, there are specific guidelines regarding assistive technology that you must follow. You can find links to both the Reasonable and Necessary guidelines and the Assistive Technology guidelines below.

It's important to note that determining whether a product is reasonable or necessary falls outside the scope of Plan Access. As a provider, you hold the responsibility to ensure compliance with these criteria.

To aid you in choosing the correct item code for your Assistive Technology, Home Modifications, and Consumables, please refer to the Assistive Technology, Home Modifications, and Consumables Code Guide for 2024-25. For more information on the Support Catalogue, visit the NDIA website. This site also allows you to verify your pricing in accordance with the guidelines outlined on the NDIS Pricing Arrangements and Price Limits page. You'll find downloadable versions of the Support Catalogue available there as well.

Low-cost items, defined as those costing under \$1,500, are categorised as low risk for participants. If you would like to understand the risk levels associated with various products, please consult the Assistive Technology Product Risk Table on the NDIS website.

Example:

Item code 03_120000911_0105_1_1 is designated for "Low-Cost AT - Personal Mobility" and describes items intended to enhance personal mobility or transferring functions, costing less than \$1,500. If your item fits this description, you may proceed to use this item code for that support.

Additional Resources:

[What does NDIS fund?](#)

[Reasonable and Necessary Guidelines](#)

[Assistive Technology Guidelines](#)

[NDIA Support Catalogue Information](#)

[NDIA Support Catalogue](#)

[NDIS Pricing Arrangements and Price Limits](#)

[Assistive Technology, Home Modifications and Consumables Code Guide 2024-25](#)

[Assistive technology product risk table | NDIS](#)

By adhering to these guidelines, you can ensure that the supports you provide are both compliant and beneficial to participants. Thank you for your attention to this important matter.