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Applying for loans

Client

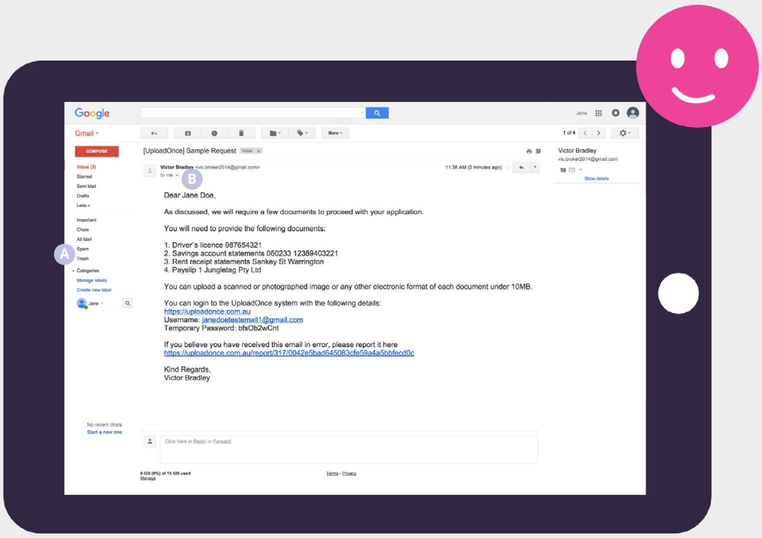
Client

You have been asked to provide documents by a service provider so they may assist you further.
Once a file is uploaded, you can reuse the document on other requests.
Your files are private until you upload them to a document request and share it with someone else.

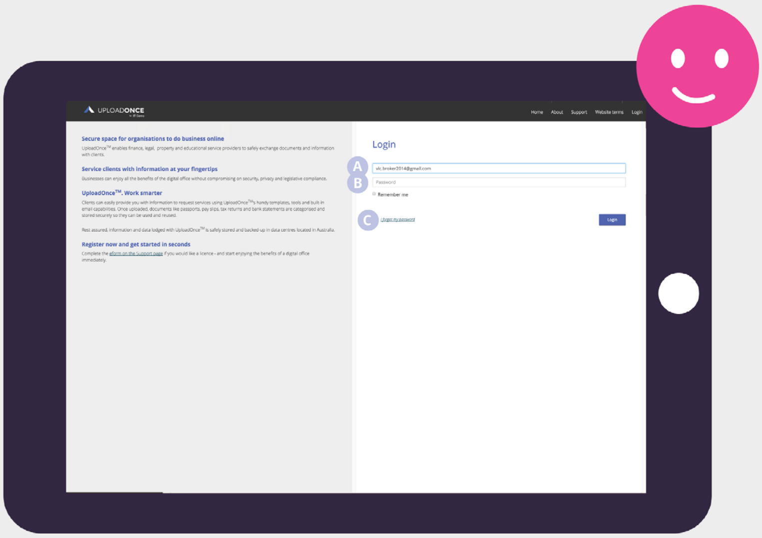
Setting up

How do I login?

You will receive a welcome email at your nominated email address containing a temporary password.



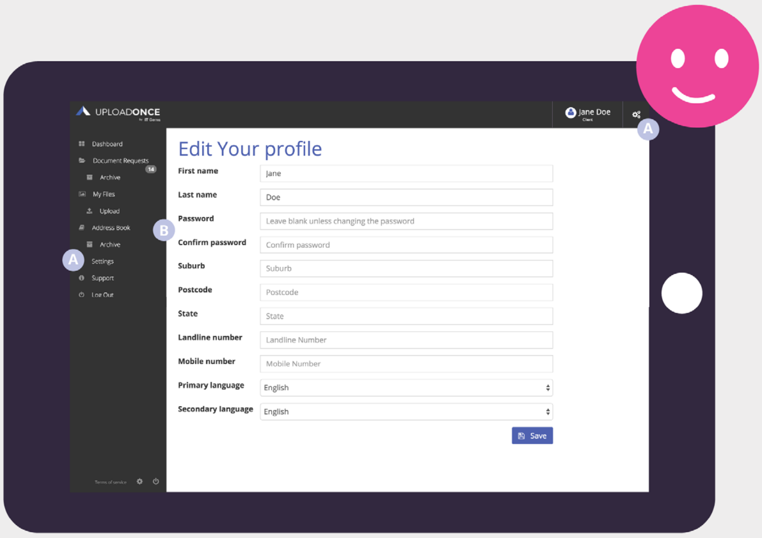
- A: If the welcome email does not arrive within 10 minutes, check your spam folder.
- B: If it's not in your spam folder, ask the Service Provider to check your email address.



- A: Login with your email address the welcome email was sent to.
- B: Use the temporary password in the email.
- C: A new temporary password will be sent to your email address if you click ***I forgot my password***.

Can I keep my personal and business documents separate?

This contains information about you associated to your chosen email address. If you would like two separate profiles, one for personal and one for your business, register separate emails.

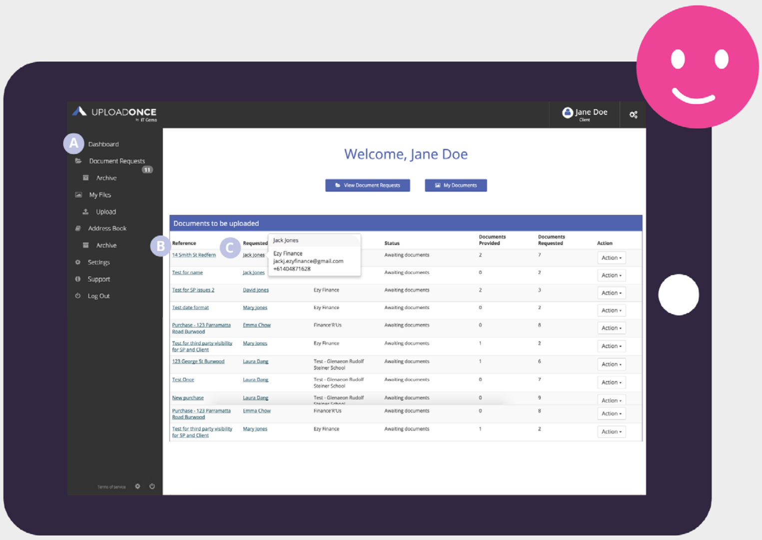


A To update or review your profile, from the left hand menu or from the top menu, select the Cog icon and select **Settings**.

B When you first login, you must change the temporary allocated and confirm your password.

What if I have multiple requests for documents?

This Dashboard provides you with an overview of all requests for documents. If you are working with different service providers, each request for documents will be listed here.
Information is updated in real time so you can collaborate with the Service Provider and ask questions at any time.



A To view your Dashboard From the left hand menu, select **Dashboard**.

B Click on the **Reference** to open a request for documents.

C Click on the **Requested By** to see details of the Service Provider.

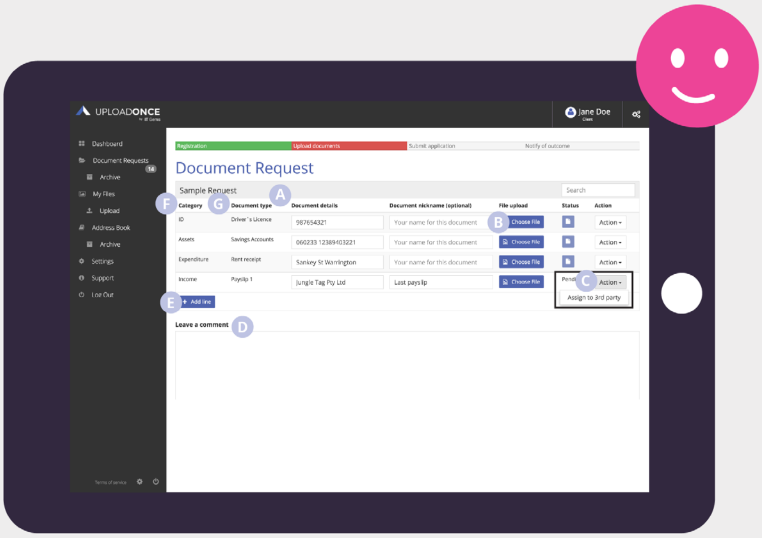
Clients

Share documents with your Service Provider

UploadOnce has handy templates and drop downs to fast track requests supply of documents and to facilitate communications. Information is updated in real time.

What documents do I need to provide?

This lists Dashboard provides you with an overview of all documents requested by your Service Provider Information is updated in real time so you can collaborate with the Service Provider and ask questions at any time.



A UploadOnce will automatically name the file being uploaded using **Document Type** and **Document Details** fields, unless you insert a different name into the **Nickname** field prior to the Upload.

B To supply documents to the Service Provider, click **Choose File**.

C If you do not have a document and you have the email address of someone who does, go to **Action** and click **Assign to Information Provider** to request documents from third parties.

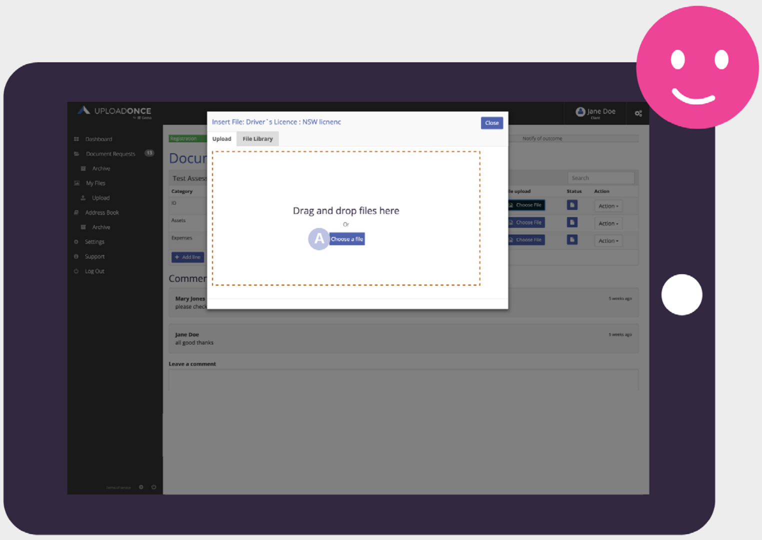
D Insert questions or comments in the **Leave a comments** section, instead of using emailing. Your correspondence is visible to you and the Service Provider in real time and you have a history of the communications.

E To provide additional documents, click **Add line** items.

F The drop down includes a list of categories.

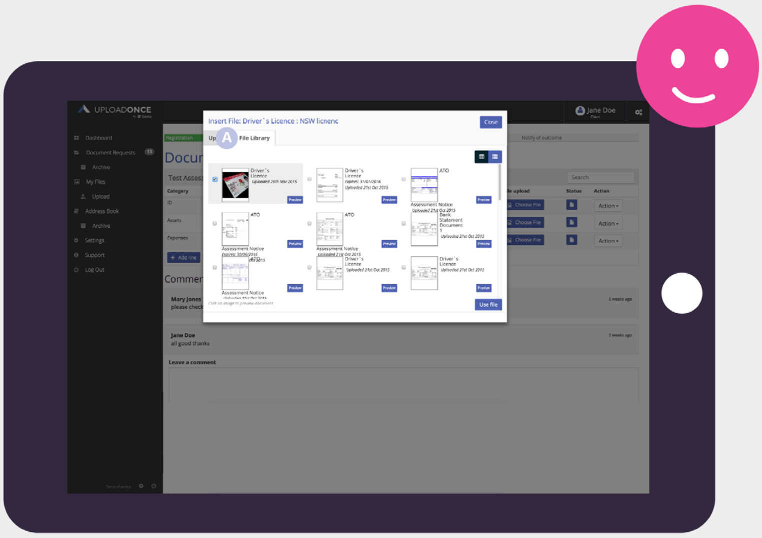
G The drop down includes a list of commonly requested documents. More can be added by selecting **Other** and typing your requested document.

How do I attach a new file?



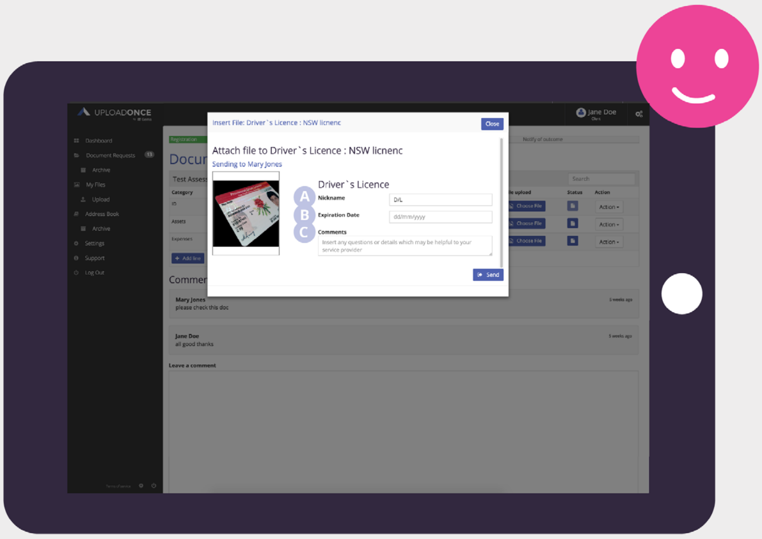
A To upload a new file, click the **Choose a file** button.

How can I reuse a file previously provided?



A Select a file from your **File Library** if you have uploaded this file previously.

How do I add details onto my files?



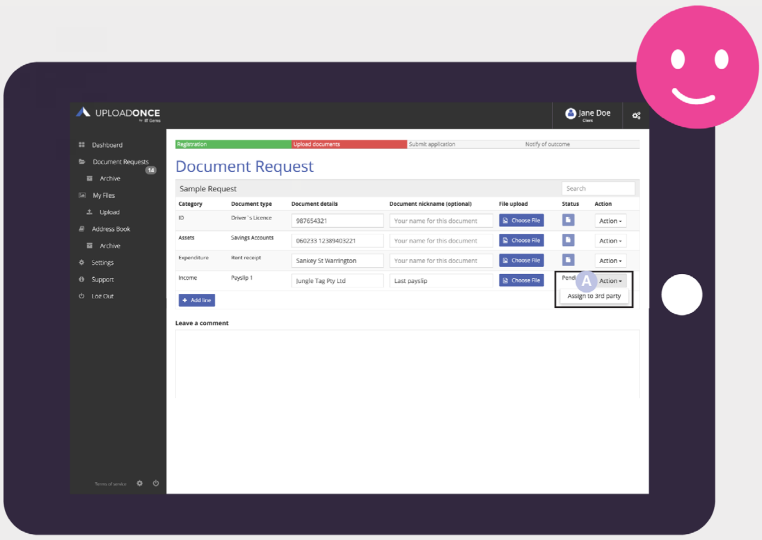
A To change the name of the document, insert text into **Nickname**.

B If your document expires, you may wish to include an **Expiration Date** so you can archive this document.

C You can also add **Comments** or additional information about the document.

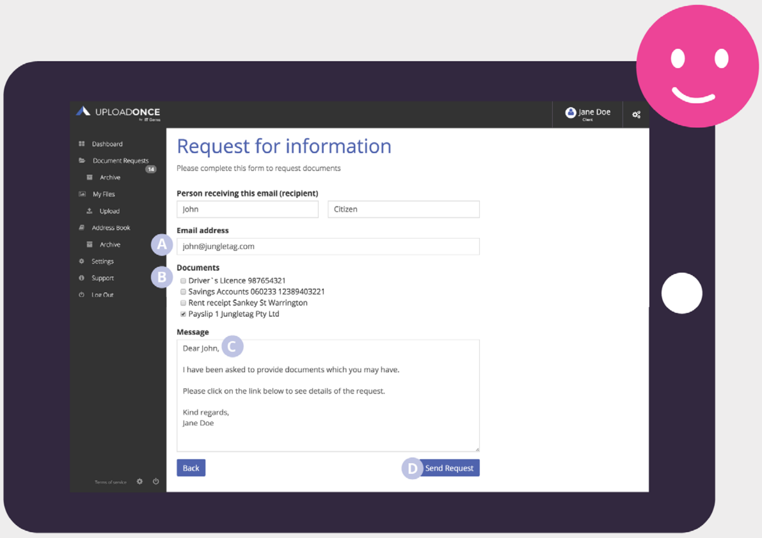
How do I request documents from a third party?

If you do not have a document and a third party, such as your partner, real estate agent or account has the document, you can easily request documents from them.



A From **Actions**, select **Assign to 3rd Party**. You can assign this task to more than one person.

To make things easier, email requesting documents are pre-populated for you.



A. You need to have an email address to send the request to.

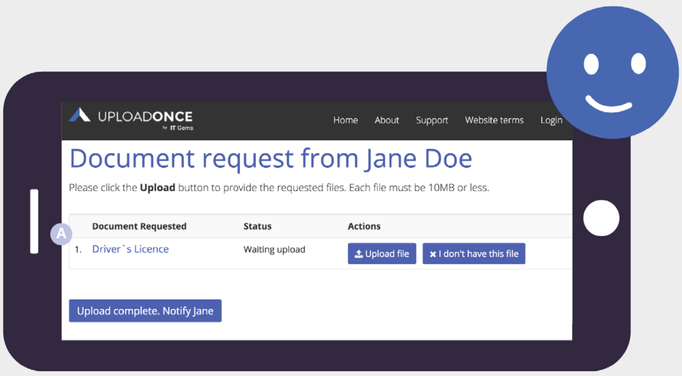
B. Tick the documents you would like this person to provide.

C. You can tailor the email if you wish.

D. Click **Send Request** to send the email.

What does an Information Provider see?

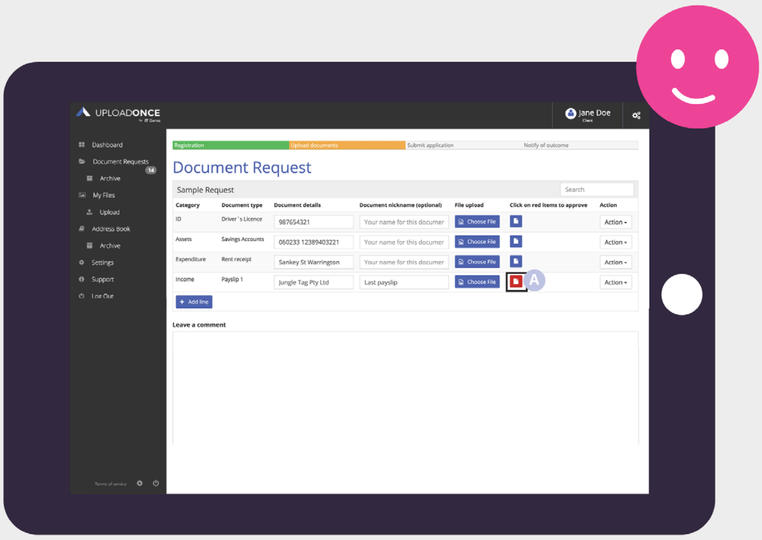
Your privacy is important.



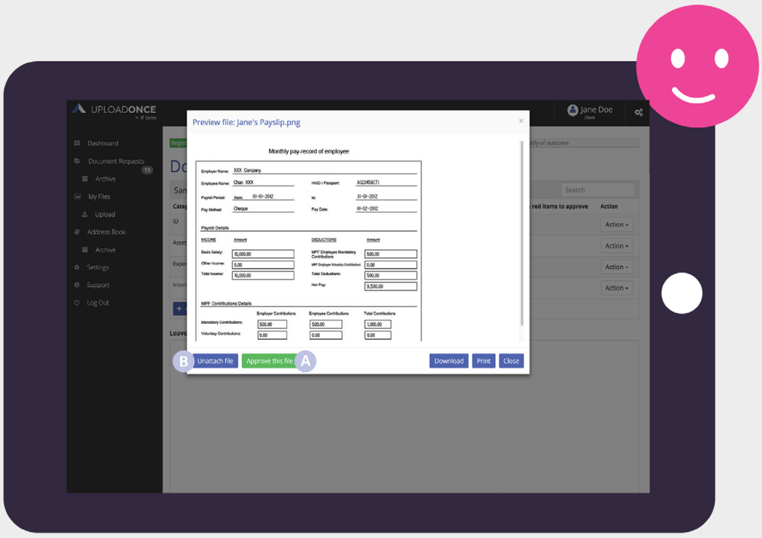
A. The Information Provider only sees a list of documents you are asking them to provide. They can not see your documents

What happens to information provided by a third party?

Review and reject or attach any document provided by third parties.



A. Click on the red icon to see the file uploaded by a third party. The red icon indicates this file is not visible to anyone else other than you.

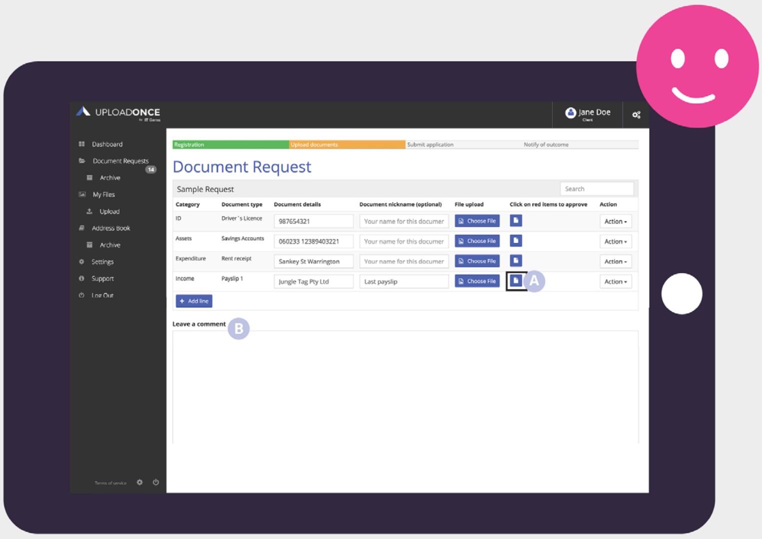


A Click **Approve this file** if this is the correct file.

B If the wrong file has been provided, select **Unattach file** and send another request.

What happens when I have uploaded all the documents?

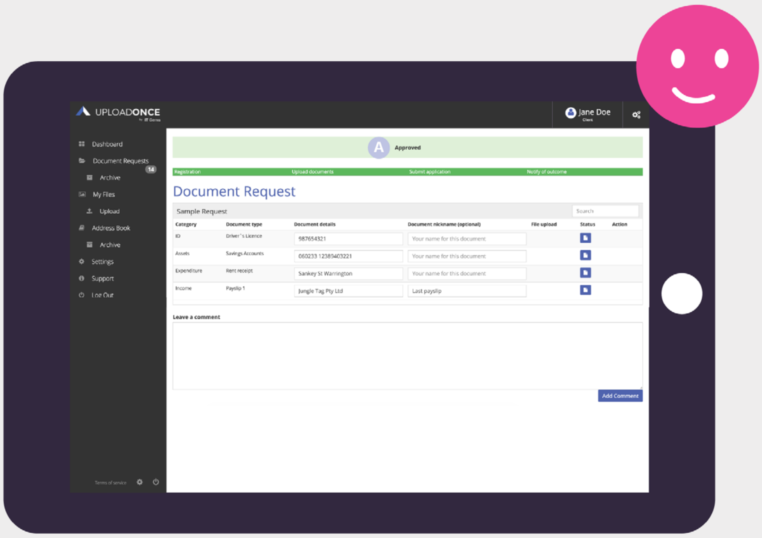
Your Service Provider can see the documents you have uploaded in real time. Your files are encrypted and stored in data centres located in Australia.



A The file turns blue when you have approved the file so you know it can now be seen by the Service Provider.

B If you wish, you can add a comment in the **Leave a comment** field asking Service Provider when they will review your documents so they know you have finished uploading all the requested documents.

What's the outcome?



A Once the documents have been submitted and your application has been assessed, the outcome of your application displays across the top.