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# Client facing brokers or bankers

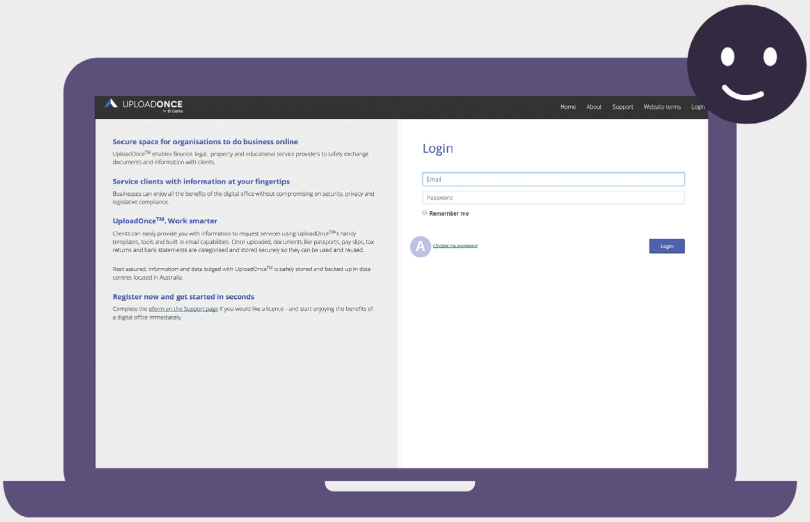
## Service Provider

# Service Provider

In this role, you are the primary contact responsible for the client relationship. You can progress a document request, or add another person as a collaborator to complete tasks.

# Setting up

## Initial Login

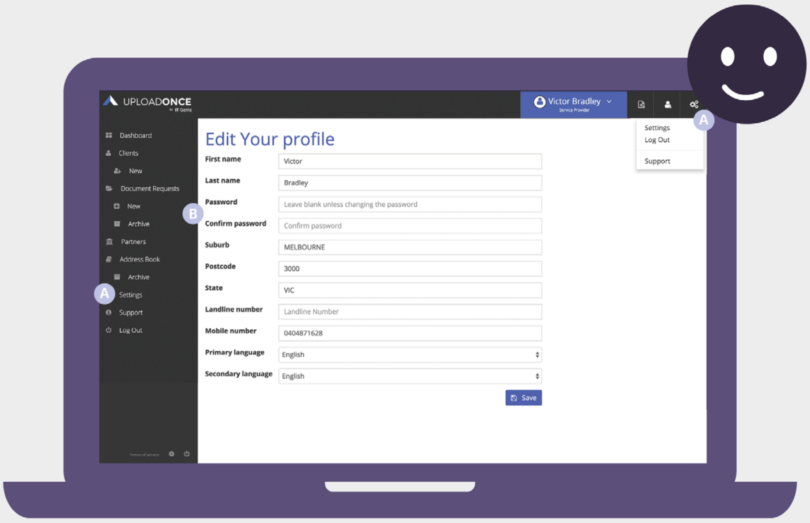



A

When signing in for the first time, enter your email address in the Email field, then click ***I forgot my password***.
If the welcome email does not arrive within 10 minutes, check your spam folder

## Your profile

This contains information about you associated to your chosen email address. Register separate emails if you would like two separate profiles e.g. one for personal and one for work.




A

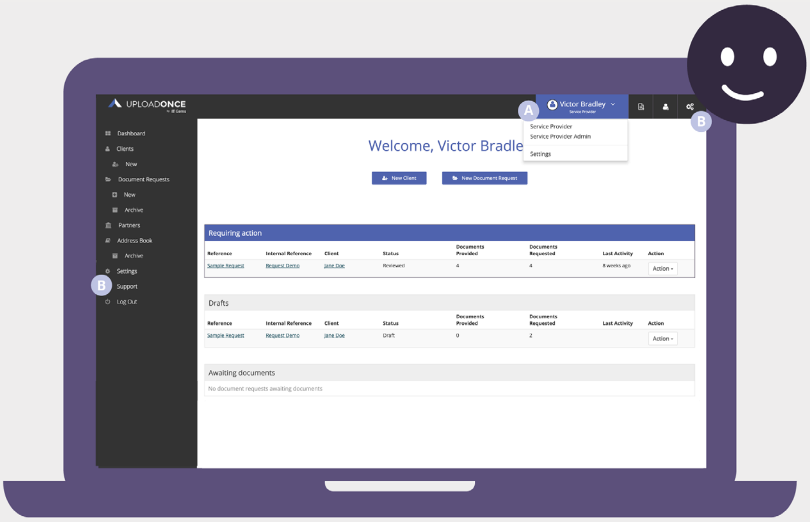
To update or review your profile, from the left hand menu or from the top menu, select the Cog icon and select **Settings**.

B

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

## Switching profiles

Your profile determines the information you see and your level of access. The default is Service Provider. To manage workflows and add company wide templates, you must switch to the Service Provider Administrator profile.




A — To switch profiles, go to the top menu and click on your name.

B — To access more profiles, go to the **Support** page to submit a **Support request**.

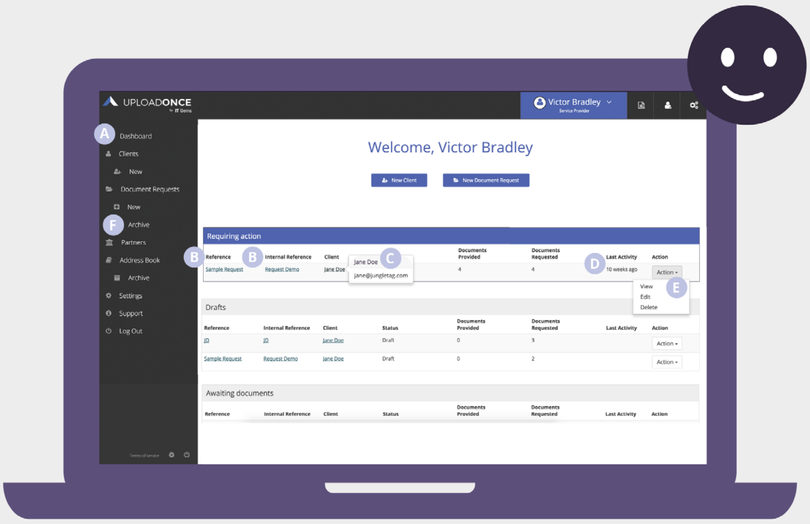
# Service Provider

## Working with prospects and clients

UploadOnce has handy templates and drop downs to fast track requests for documents and to facilitate communications

## Dashboard

This Dashboard provides you with an overview of Document Requests where you manage the client relationship as well as on Document Requests where you are the collaborator. Information is updated in real time so you can monitor progress and answer customer questions at any time.




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

B — To view a request, click on **Reference** or **Internal Reference**.

C — To see client email address, click on **Client**.

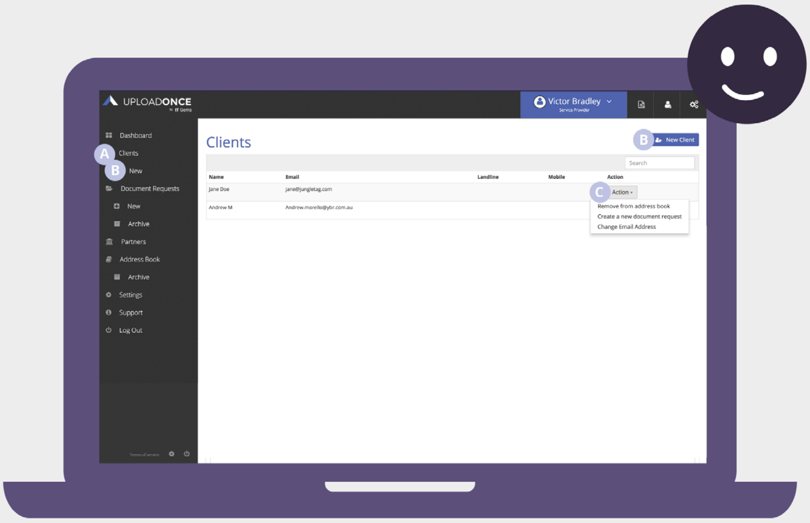
D — **Last activity** displays when the client last performed a task. If the client has not opened the request, this will be blank.

E — To view, edit or delete a request, click **Action**.

F — Documents can be manually moved to archive when someone deletes the request and UploadOnce automatically archives the request shortly after it is finalised and has a closed status. From the left hand menu, go to **Document Requests** select **Archive** to reverse this action or see these requests.

## Managing Clients

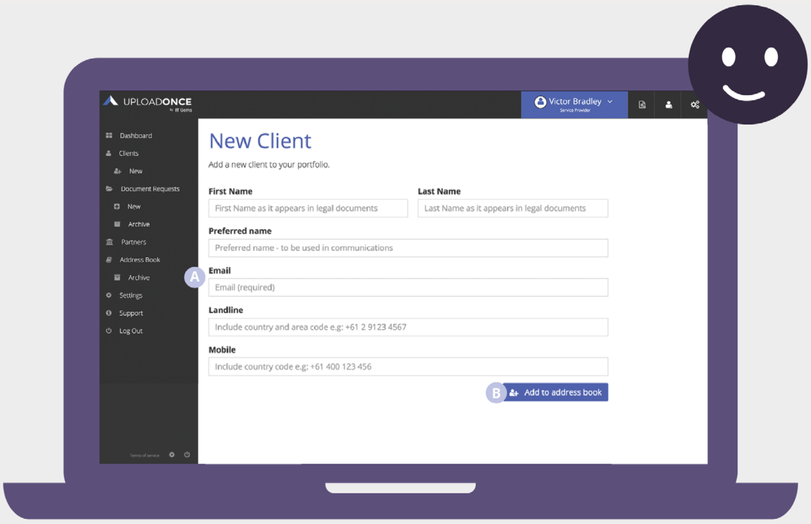
The clients in your Address Book can only be viewed by you when you are a Service Provider. To bulk upload client details, ask your Service Provider Administrator for the CSV template.




A — To see a list of all your clients, from the left hand menu, select **Clients**.

B — To add a new client, go to the left menu and select **New** under **Client** or go to the top right and click the **New Client** button.

C — Remove a client from your address book or create a new document request for them from **Action**. You can correct the email address if the client has not received the welcome email and registered.

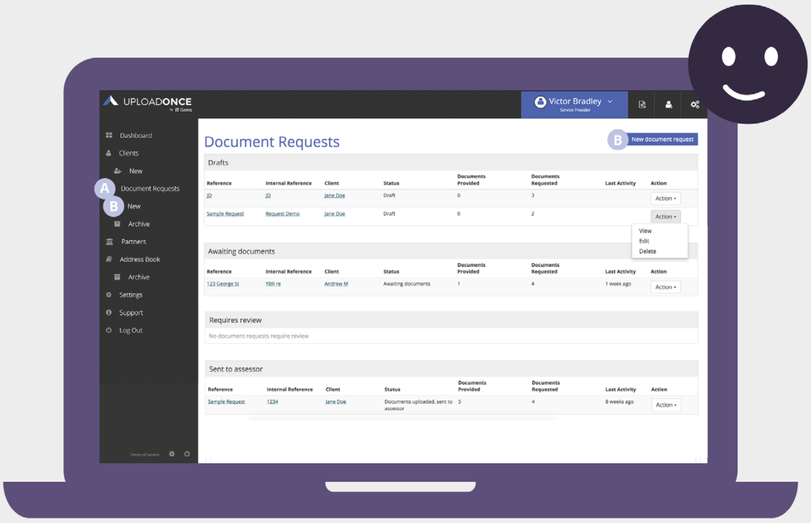



A — An email address must be included to add a new client.

B — A Service Provider can only add one contact at a time. The Service Provider Administration can bulk upload contacts for a Service Provider.

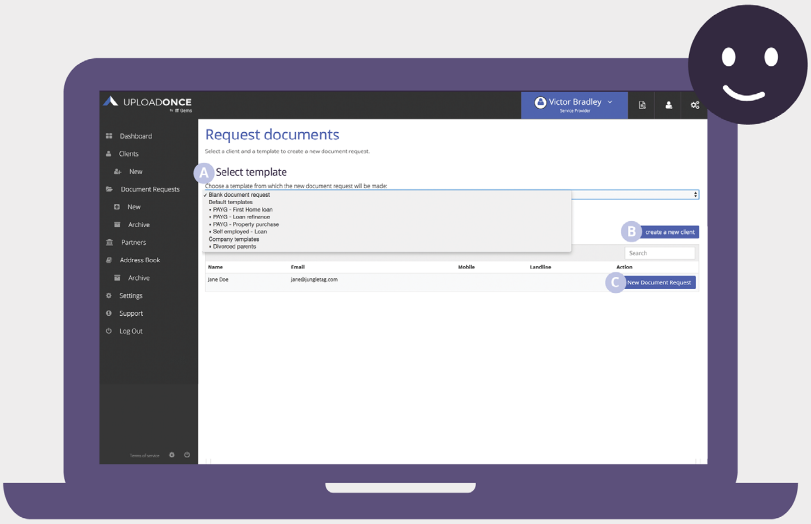
## Templates to fast track requests for documents

To fast track the request for documents,
- UploadOnce provides some templates.
- Tailored templates created by the Service Provider Admin is available to the entire organisation.
- Tailored templates created by a Service Provider will only be visible to the person who created it.




A — To see a list of all work in progress, from the left hand menu, select **Document Requests**.

B — To request documents, from the left hand menu, under **Document Request**, select **New** or from the top right, click **New Document Request** button.



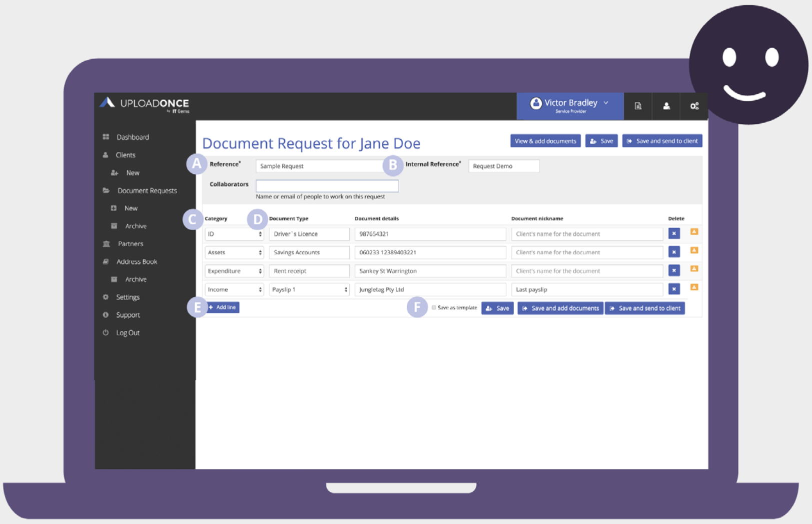

A Use a blank document request and make your own or use one of the pre-populated templates.

B To send a document request to a client not already in your Address Book, click **Add a new client** button. The client must have an email address to create a new client OR

C To send a request to an existing client, find the client and click the **New Document Request** button next to their name.

## Requesting Documents

As the Service Provider, you control who can see or access your request for documents. Information is updated in real time so you can collaborate with colleagues and clients to fast track collation of documents.




A **Reference** can be changed at any time and is visible by the client. Tip: For refinancing applications use address of the underlying asset being mortgaged.

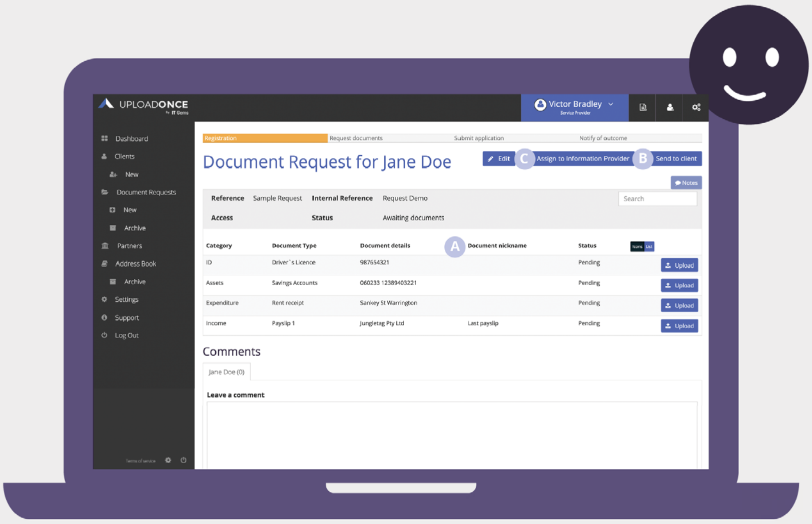
B **Internal Reference** is not seen by the client. Tip: Brokers, use reference provided by the Aggregator's system.

C The drop down includes a list of categories. More categories can be added if required.

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

E Add line items to request additional documents.

F Create your own tailored Document Request by selecting **Save as a template**.



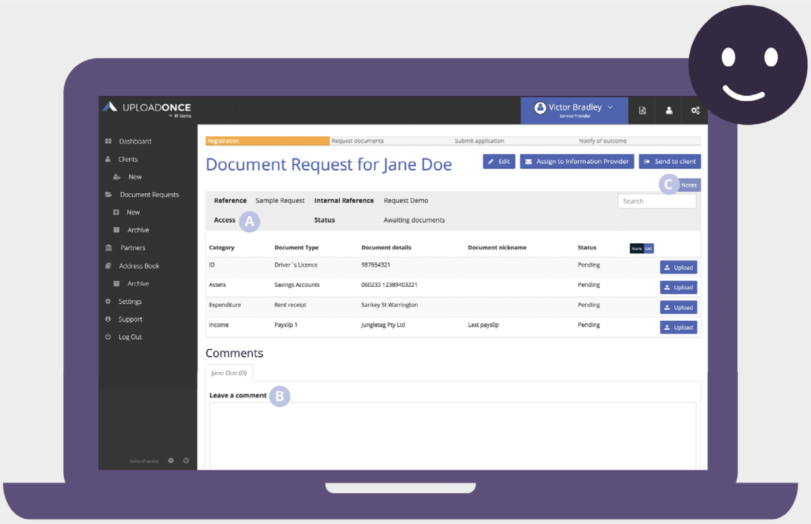

A If the document nickname is blank at the time of upload, UploadOnce will automatically name the file using **Document Type** and **Document Details** fields.

B To generate communications to the client once all document requested are listed click **Send to client**. Click on the same button to generate reminders.

C To request documents from third parties on behalf of the client, click **Assign to Information Provider**.

## Working with Collaborators

To fast track the completion of tasks and enable others to follow up on a Service Provider's behalf, collaborators can be added by the Service Provider or the Service Provider Admin. Document requests disappear from a collaborator's Dashboard once the request is finalised.




A

Add Collaborators so other people can complete tasks on your behalf. Insert the Collaborator's email address to grant access to a person external to your organisation. When the request is closed, the Collaborators' access will automatically be removed.
Tip: Collaborators must be a registered to use UploadOnce before they can see your document

B

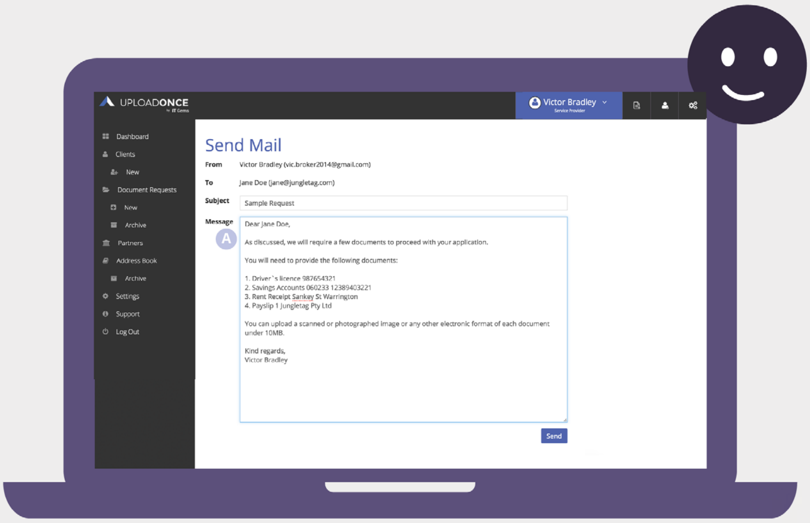
Text inserted in the **Comments** section is visible to the client, you and your collaborators.

C

Text inserted into **Notes** will only be visible to you and your Collaborators. Clients do not see text in **Notes**.

## Emails to clients

UploadOnce generates pre-filled client emails to facilitate communications.

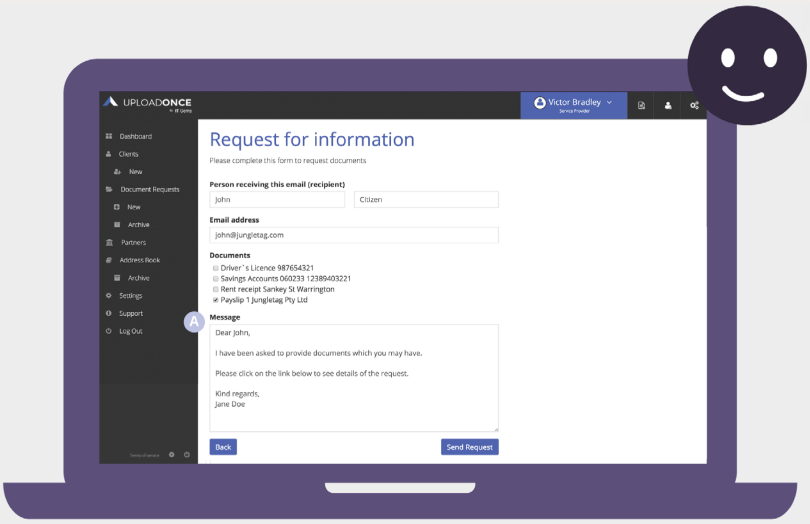



A

Emails can be tailored before it is sent to a client.

## Request documents from third party Information Providers

UploadOnce generates pre-filled emails to third parties requesting documents on behalf of the client to fast track supply of documents.

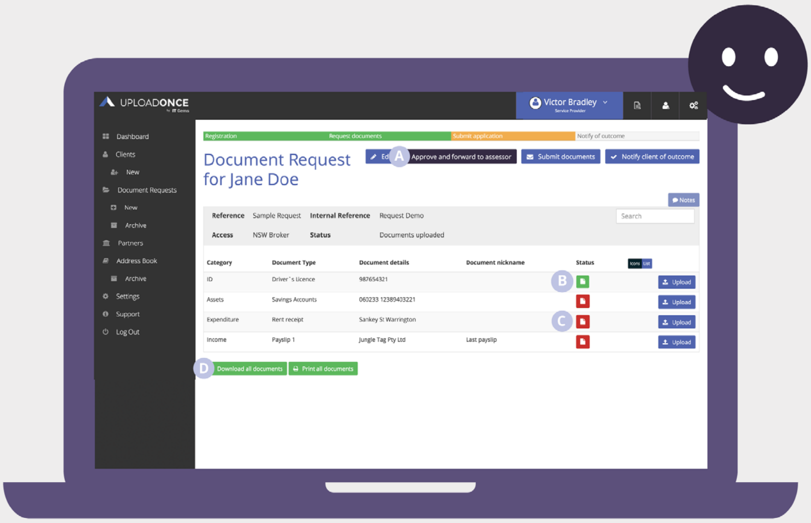



A

Templated emails can be tailored before it is sent to a third party requesting they upload information. Third parties can not view documents in the request.

# Submit documents to Assessors (such as Credit providers or lending teams)

Documents can be made available via UploadOnce or by downloading all documents and emailing the zipped file to Assessors.

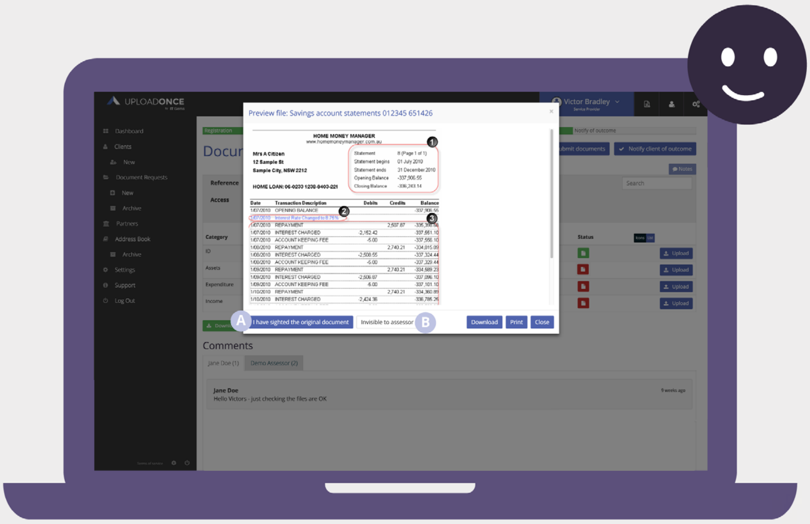


A After reviewing documents provided by the client, click the **Approve and forward to the assessor** button to forward the documents.

B A green icon indicates the document has been sighted.

C A red icon indicates the document is not marked as sighted.

D You can also **Download all Documents** and send a zipped folder of all the documents to an external party / Assessor.

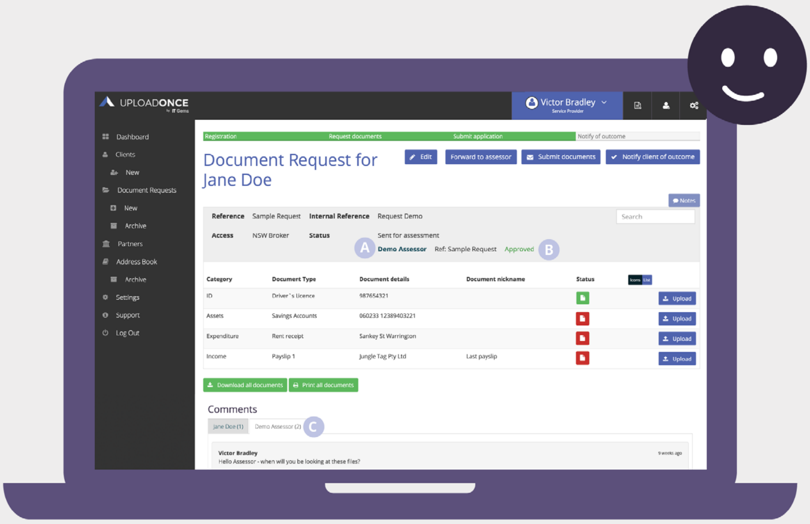


A To mark the document as sighted by clicking the **mark as sighted** button.

B Select whether this document will be visible or invisible to the assessor. The button's default is **visible to assessor**. The document will be invisible to the Assessor if you click the button and **invisible to assessor** appears.

# Monitoring Assessor feedback

Document requests can be submitted to multiple assessors.



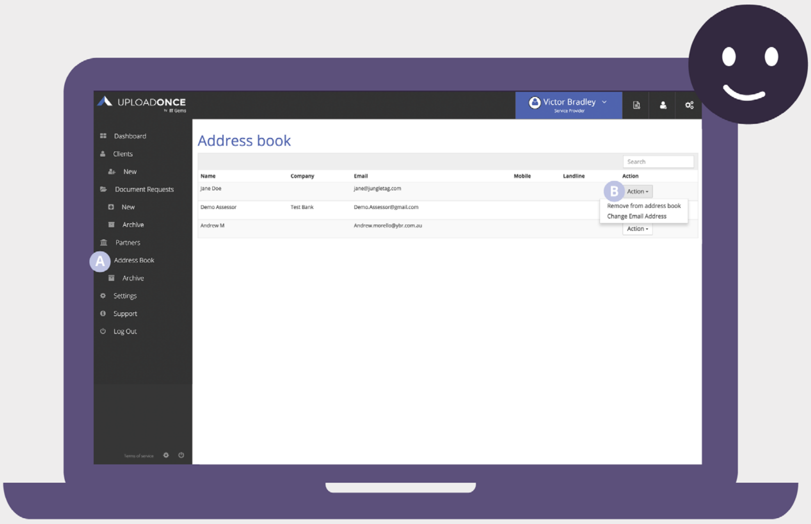
A To see the status of submissions to each Assessor e.g. credit team, including whether certain documents were rejected or additional information is required, click on the Assessor's name.

B The final result is displayed if the request has been reviewed and approved or rejected.

C Click on the tabs under **Comments** to view additional correspondence between an Assessor and the Service Provider.

# Address Book

The address book is dynamic and automatically displays contacts specific to your login and profile.

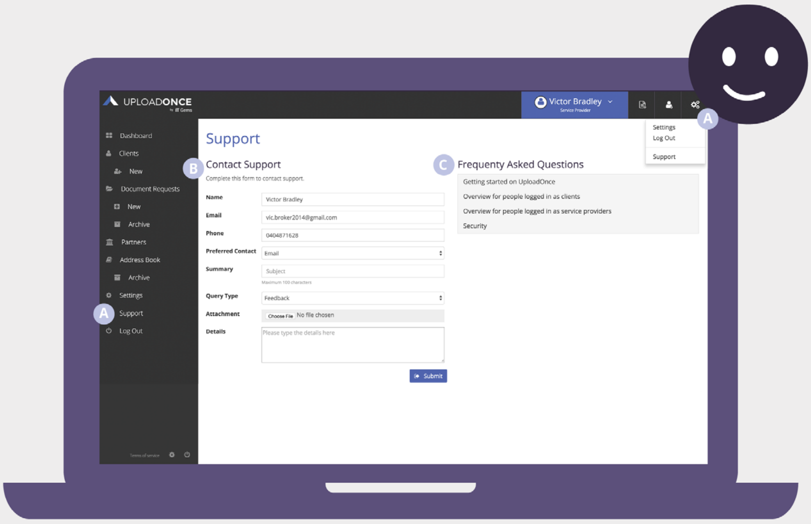



A — To see the list of contacts relevant to your profile, from the left hand menu, select **Address Book**.

B — To archive a contact from **Action**, select **Remove from Address Book**.

# Support

You can contact us via the Support page with questions, comments or feedback. If your client contacts UploadOnce via the support form, Support will first contact the primary Service Provider responsible for the Client.




A — To access the support form, from the left hand menu or from the top menu, select the cog icon, select **Support**.

B — When logged in, the **Support** form auto-populates with information. This enables the Support team to request access to view your system if required.

C — Everyone can access self help by reviewing **Frequently Asked Questions**.