

Table of Contents

Credit Team

Assessor



Assessor Setting up

- Initial login
- Your profile
- Switching profiles

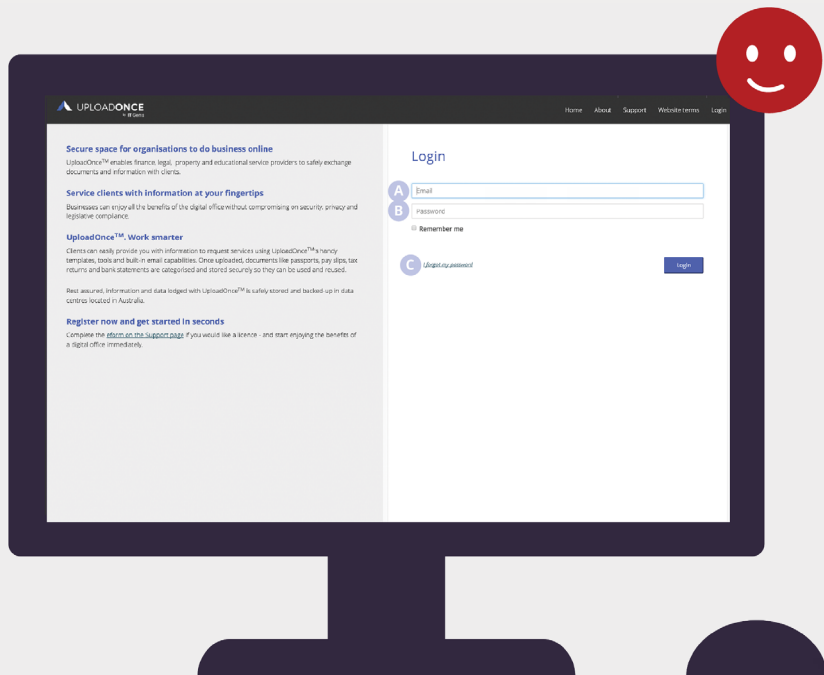
Review, approve and provide feedback on documents

- Dashboard
- Address Book
- Support

Assessor

In this role, you are being asked to review the documents submitted. You can accept, reject and add comments or request additional information an application or reallocate the application to another person to complete these tasks.

Setting up Initial login



The screenshot shows the UploadOnce login page. On the left, there is a sidebar with text about the service. On the right, there is a 'Login' form with fields for 'Email' and 'password', a 'Remember me' checkbox, and a 'login' button. A red smiley face icon is in the top right corner of the browser window.

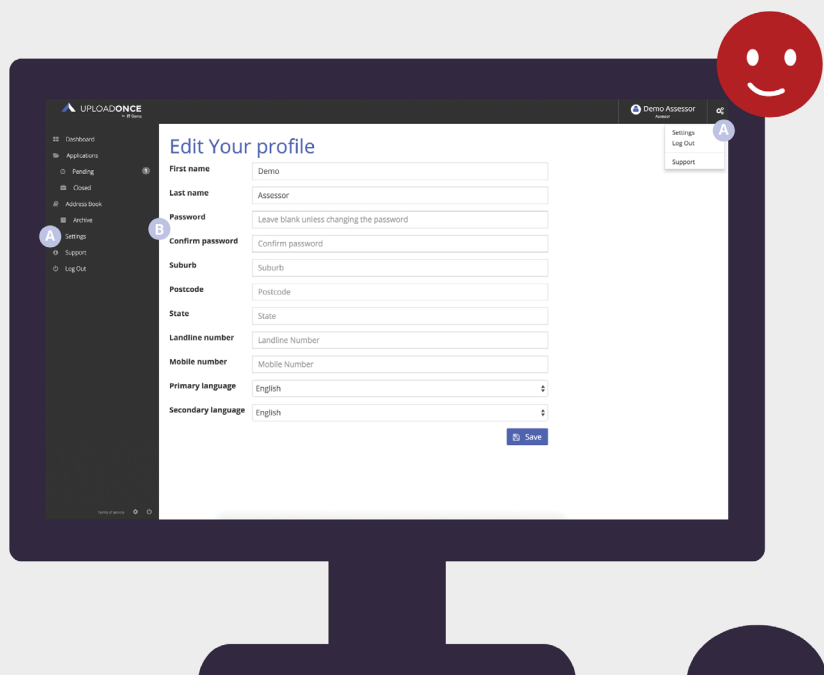
A Login with your email address the welcome email was sent to.

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.***

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.



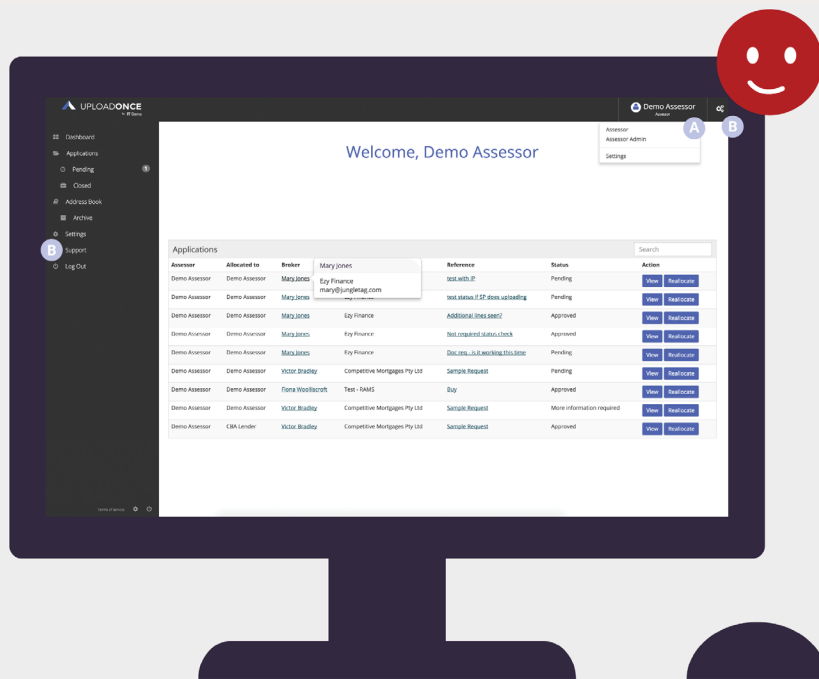
The screenshot shows the 'Edit Your profile' page. On the left, there is a sidebar menu with options: Dashboard, Applications, Pending, Closed, Address Book, Active, Settings, Support, and Log Out. The 'Settings' option is highlighted. The main content area has a 'Demo Assessor' header and a 'Settings' dropdown menu. Below this, there are form fields for 'First name', 'Last name', 'Password', 'Confirm password', 'Suburb', 'Postcode', 'State', 'Landline number', 'Mobile number', 'Primary language', and 'Secondary language'. A 'Save' button is at the bottom right. A red smiley face icon is in the top right corner of the browser window.

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.



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

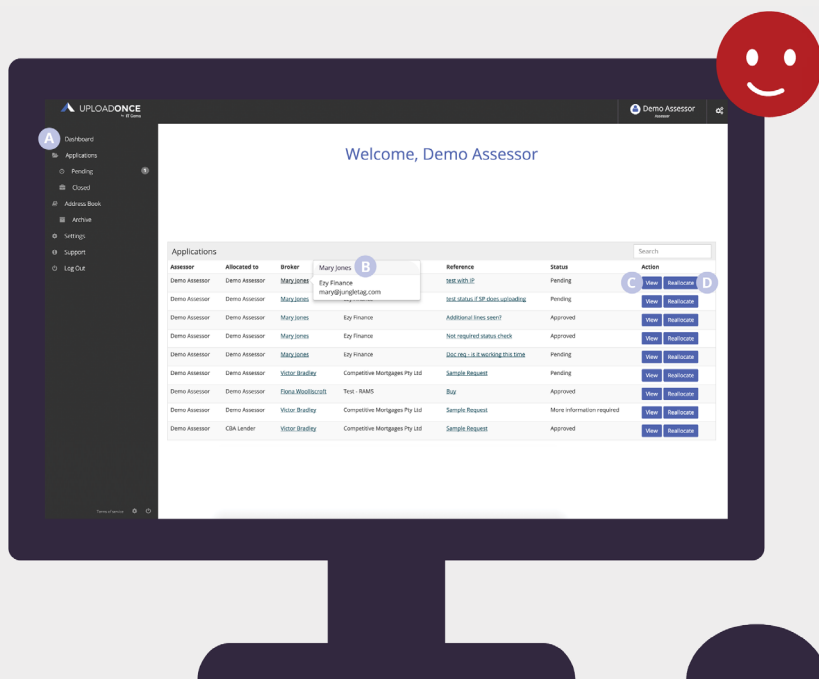
To access more profiles, go to the **Support** page to submit a **Support request**.

Assessor

Review, approve and provide feedback on documents

Dashboard

This Dashboard provides you with an overview of document to review and approve. Information is updated in real time so you can monitor progress, provide feedback and ask questions at any time.



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

Click on **Broker** to see details of the person submitting documents for approval.

Click the **View** button to see the documents attached to an application.

Click the **Reallocate** button to reallocate the application to someone else.

Files available to the Assessor are the same quality as those uploaded.

UPLOADONCE Demo Assessor

Sample Request

A Approve **B** More information required

Status	Category	Document Type	Details	Documents
C Approve D Green icon	ID	Driver's Licence	987654321	E Red icon
Approved	Assets	Savings Accounts	098765 1234567890123	
Rejected	Expenditure	Rent receipt	Sunley St Warrington	
Approved	Income	Payslip 1	JungleTag Pty Ltd	

F Add Comment

Comments
Leave a comment

Address Book

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

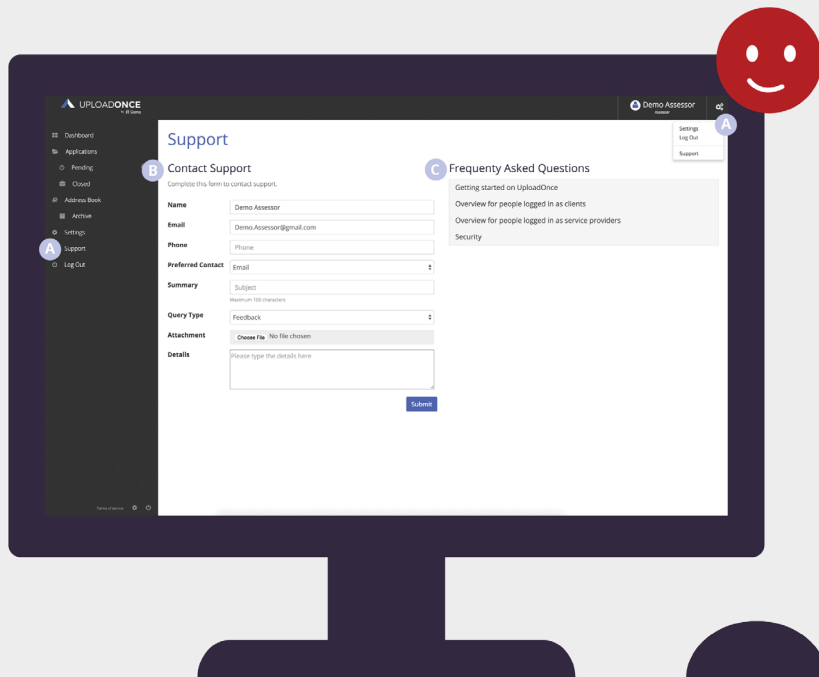
UPLOADONCE Demo Assessor

Address book

Name	Email	Organisation	Mobile	Landline	Action
JACK JONES	jack.jones@niced@gmail.com	City Finance	+61 854671128		B Remove from address book
Charles Smith	broker.charles.smith@gmail.com	FinancePTDs			Action
Mary Jones	mary@jungletag.com	Big Finance			Action
Victor Bradley	vic.bradley2014@gmail.com	Competitive Mortgages Pty Ltd	0904671128		Action
Helen Woodcroft	helenwoodcroft@gmail.com	Test - RAMS			Action
Laura Chang	Laura.dang9@gmail.com	Test - Glenmore Ruffell Senior School	+61 434868888		Action
Emma Chase	Emmaj@jungletag.com.au	FinancePTDs			Action
David Jones	davidjones@jungletag.com	City Finance			Action

Support

You can contact us via the Support page with questions, comments or feedback.



The screenshot shows the UploadOnce user interface. On the left is a dark sidebar menu with options: Dashboard, Applications, Pending, Closed, Address Book, Archive, Support (highlighted with callout A), and Log Out. The main content area is titled 'Support' and contains a 'Contact Support' form (callout B) and a 'Frequently Asked Questions' section (callout C). The form is pre-filled with 'Demo Assessor' information. A red smiley face icon is positioned above the top right of the screen, near the 'Support' link in the top navigation bar.

Support

Contact Support
Complete this form to contact support.

Name
Demo Assessor

Email
Demo.Assessor@gmail.com

Phone
Phone

Preferred Contact
Email

Summary
Subject
Maximum 100 characters

Query Type
Feedback

Attachment
Choose file No file chosen

Details
Please type the details here

Frequently Asked Questions
Getting started on UploadOnce
Overview for people logged in as clients
Overview for people logged in as service providers
Security

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

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

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