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Back office & support staff

Collaborator

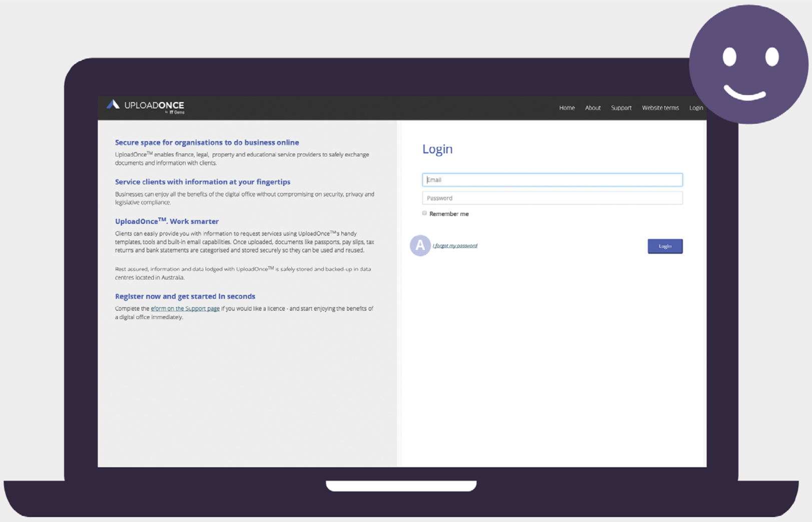
Collaborator

In this role, you are supporting the Service Provider responsible for the client relationship.
As the collaborator, you have been granted access to complete tasks on behalf of the Service Provider and you can see everything the Service Provider can see. By default, all communications will be sent in the name of the Service Provider.

Setting up

Initial Login

You must be a registered to use UploadOnce before you can see any document requests.

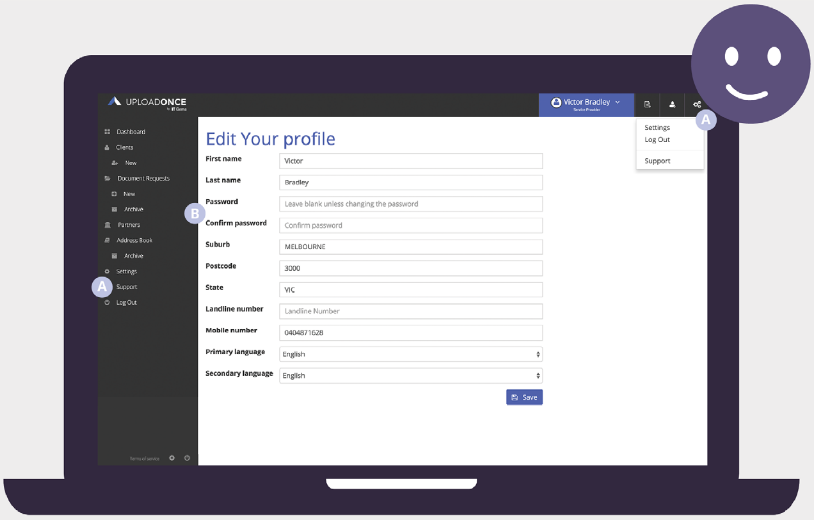


A

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. If you would like two separate profiles, one for personal and one for work, register separate emails.



A

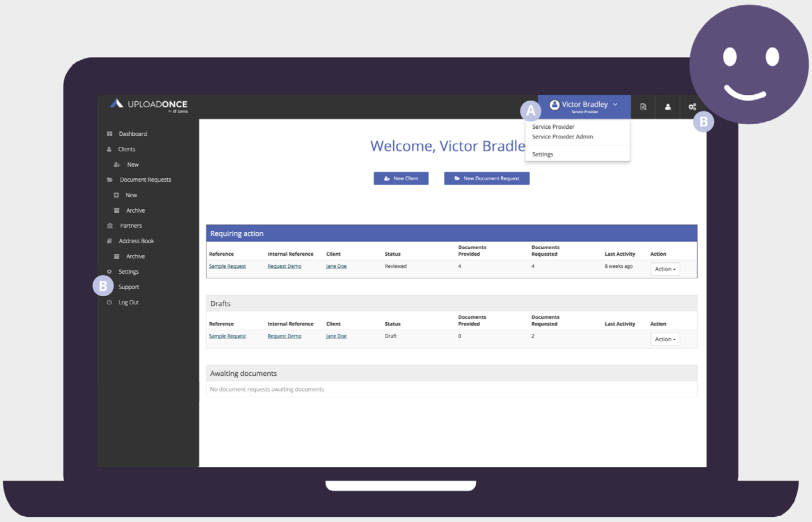
To update or review your profile, from the left hand menu or from the top menu, select the Cog icon and select **Settings**.

B

When you first login, you must change the temporary 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**.

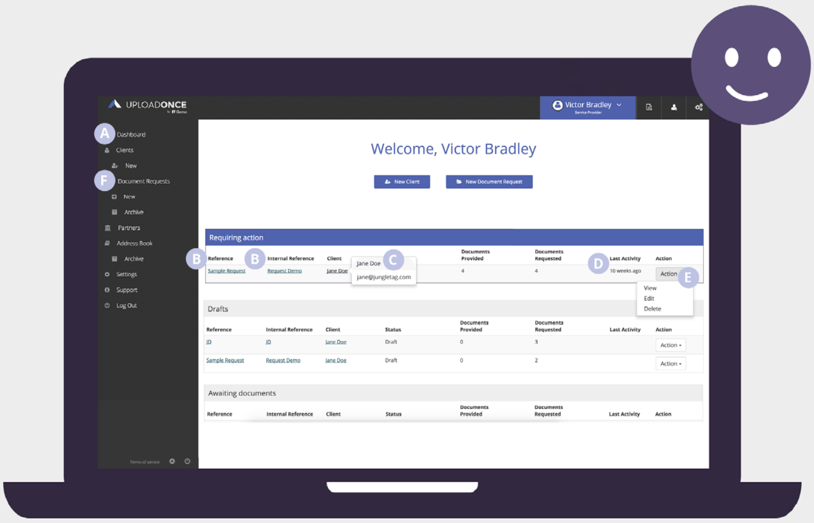
Collaborator

Supporting client facing Service Providers

Document requests disappear from your Dashboard once the request is finalised.

Dashboard

If a service provider has provided you with access to their requests for documents, it will appear on your dashboard until your access has been manually removed or the document request has been finalised and closed.
If a document request does not appear on your Dashboard, either the Service Provider or the Service Provider Admin can provide access.



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**.

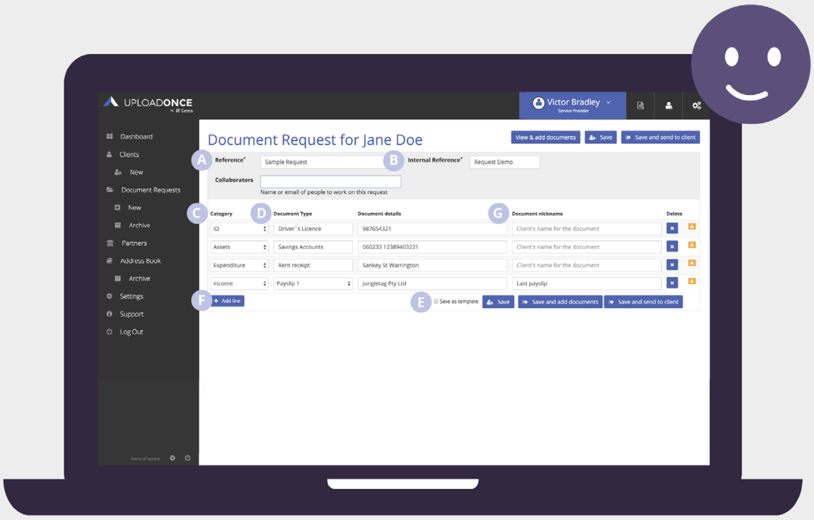
D — **Last activity** displays when the client last performed a task. If the client has not opened the request, this will be blank.

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.

Requesting Documents

Information is updated in real time so you can support your colleagues and work with 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.

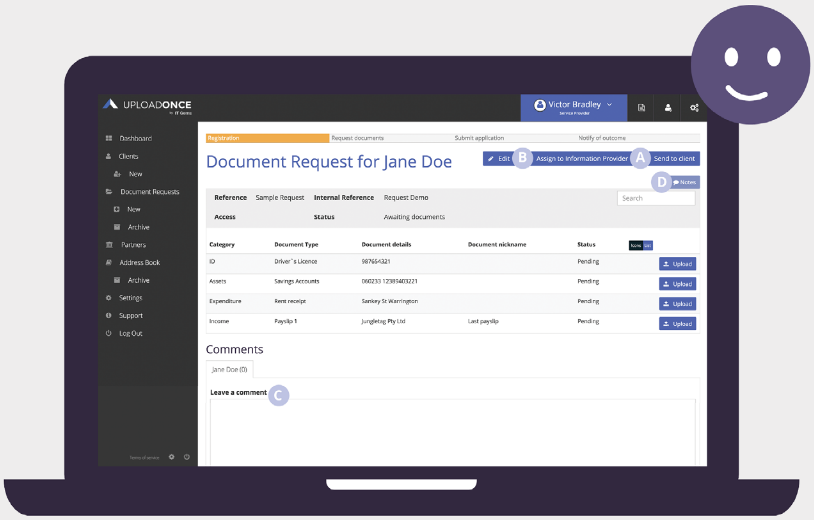
C. The drop down includes a list of **categories**. More categories can be added if required.

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

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

F. To request additional documents, click the **Add line** items button.

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



A. To generate an email to the client once all requests requested are listed, click **Send to Client**. Click this button to generate email reminders.

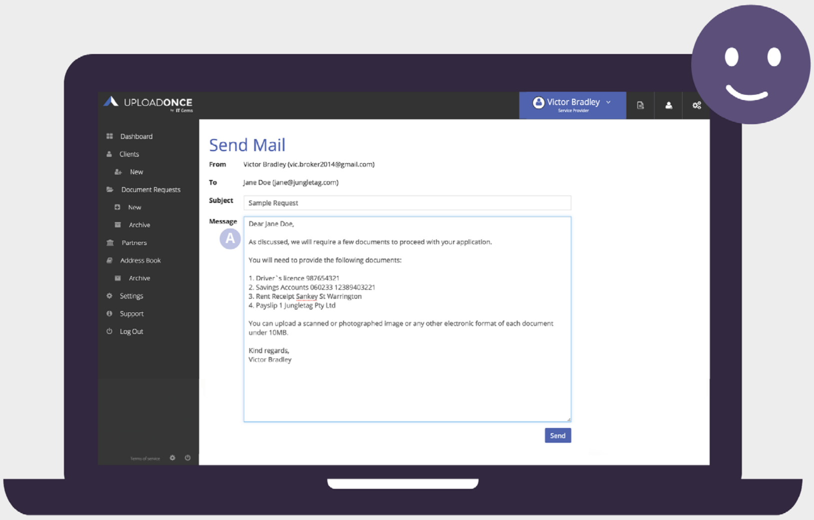
B. Click **Assign to Information Provider** to request documents from third parties on behalf of a client.

C. Text inserted in the **comments** section is visible to the client, your Service Provider and all Collaborators.

D. Text inserted into **Notes** is visible to the Service Provider and all collaborators. Clients do not see text in **Notes**.

Emails to clients

UploadOnce generates pre-filled client emails to facilitate communications. By default, all communications will be sent in the name of the Service Provider.

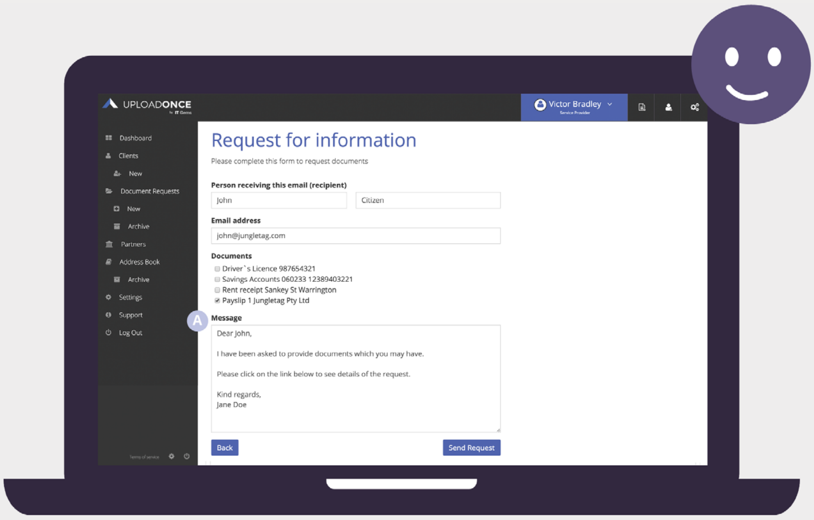


A

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

Request documents from third party Information Providers

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

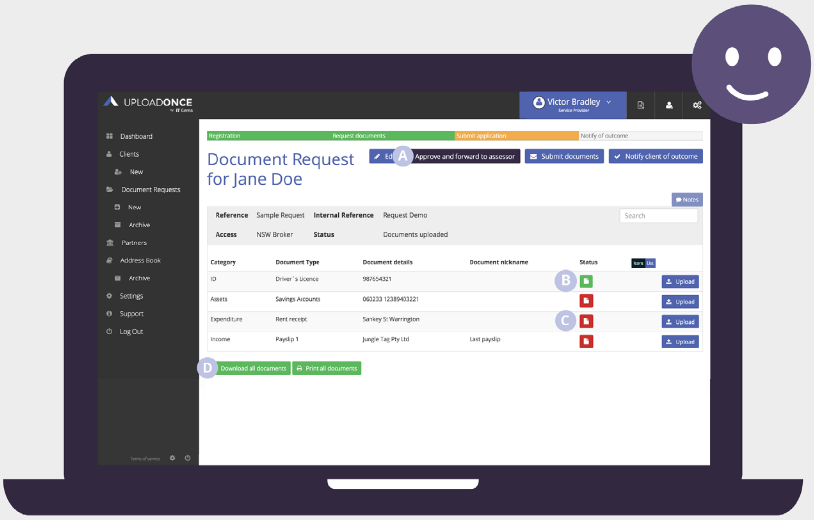


A

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 email or via UploadOnce.



A

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

B

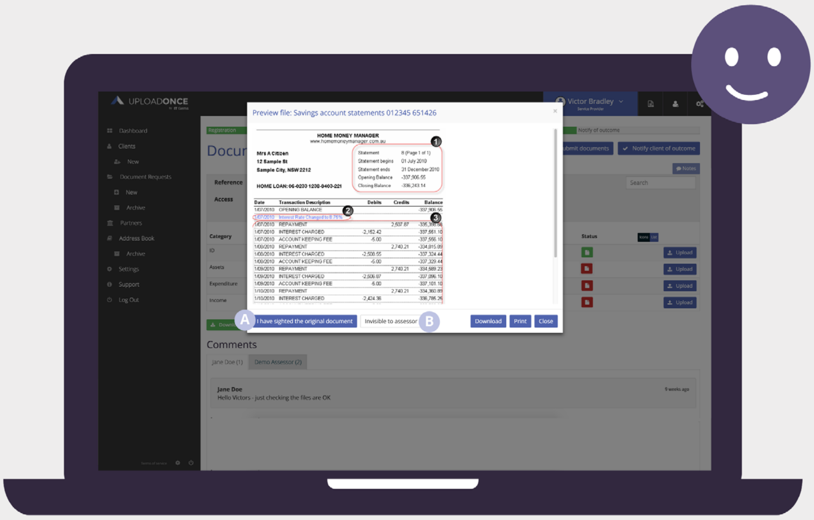
A green icon indicates the document has been sighted.

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.

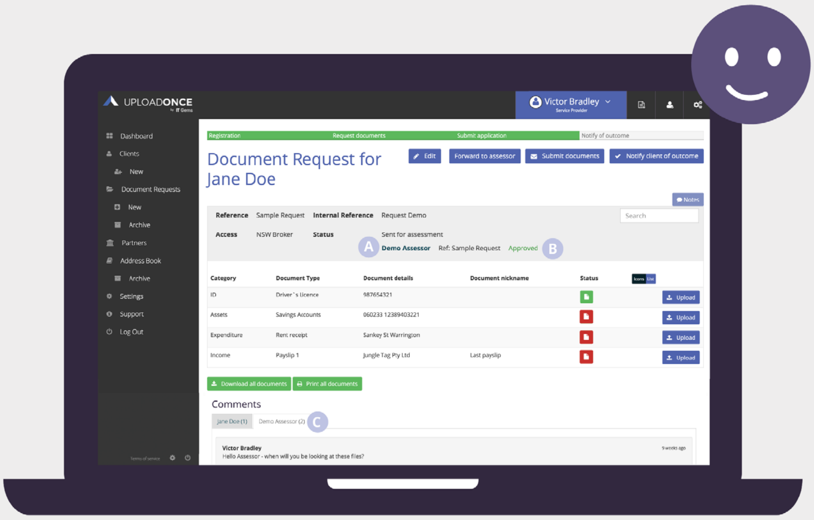


A — To mark the document as sighted by clicking the **mark as sighted** button.

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.



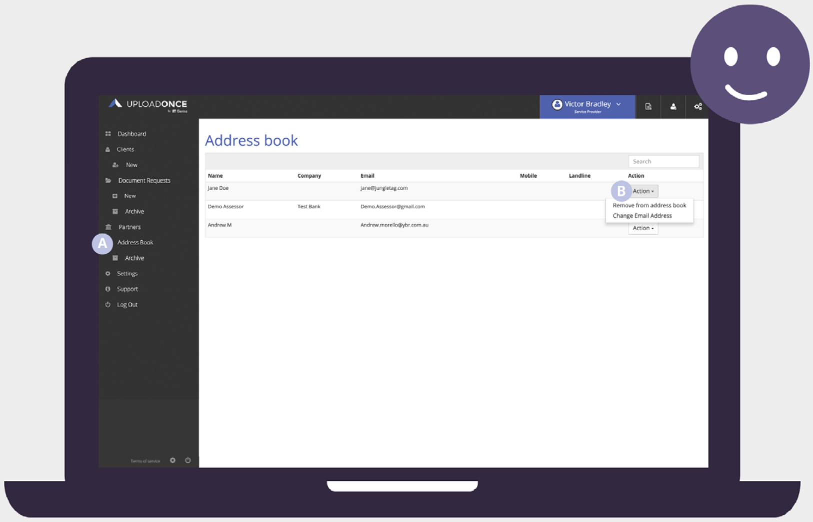
A — To see the status of submissions to each Assessor e.g. credit team, including whether certain documents were rejected or additional information is required, click on the Assessor's name.

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 your profile.

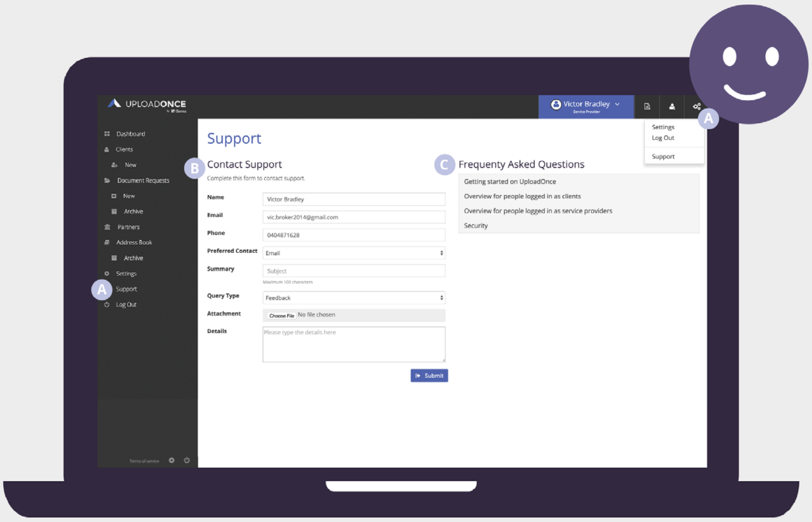


A — To see the list of contacts relevant to your profile, from the left hand menu, select **Address Book**.

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**.