

Intermediary user guide

Upload documents

Upload documents

On the summary screen you can view the items which we need you to upload in addition to the system generated documents. The list of items will be displayed by clicking on 'Checklist items':

Checklist items

Checklist item	Owner	Type	Status	Date Satisfied	Upload Document	Add Note
Applicant one - latest P60/March payslip(s) 30/04/19 12:16	Broker	PreOffer	Active		Upload	Add Note
Applicant one - last months/last four week's payslips 30/04/19 12:16	Broker	PreOffer	Active		Upload	Add Note
Signed Declaration and Direct Debit 30/04/19 12:16	Broker	PreOffer	Active		Upload	Add Note
**Hello 30/04/19 12:16	Broker	PreOffer	Active		Upload	Add Note

To upload a document, click on the relevant 'Upload', which will take you through to the 'Upload Document' screen. Click on 'Browse' and select the correct document. Each document must be uploaded individually. Please ensure the 'Upload Document' corresponds with the 'Checklist item' to avoid any delays in processing the information.

Upload Document

Document *

Browse...

Please ensure that the document(s) being uploaded relate to the applicant(s) for this specific case.

Failure to do so will result in a breach of the General Data Protection Regulations.

Applicant one - last months/last four week's payslips 30/04/19 12:16	Broker	PreOffer	Active	Upload View	Add Note
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Notes can be added where we require further information regarding a particular query. To provide this information to us, please follow instructions to upload a document but click on 'add note'

Add Note

Subject

Message: *

Once the document(s) has been uploaded you will have the option to view.



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