

*HINT! Please make sure the documents are saved as PDFs & are not password protected.*

*To upload payslips enter the 'Case Overview' screen and select 'PLEASE UPLOAD REQUESTED DOCUMENTS' in the Action Centre.*

**Upload Documents**

Accepted File Types  
You will only be able to upload PDF, PNG, JPG and JPEG files up to 10 Megabytes.

I certify that all documents uploaded are true copies of original documents which have been provided by the customer(s). Regarding identification documents, where I have seen the customer(s) face to face, I can confirm that the ID provided is a true likeness of customer(s).

*Acknowledge this message to provide certification of the documents being provided*

*HINT! On the broker portal in the 'Case Overview' you will see 'Start Conversation', these messages are relevant to the application being viewed and can be used to provide outstanding information for the case owner to consider as part of the next assessment – if something is urgent please phone or contact your BDM*

**Help and Support**

If your application is currently showing as 'Pending' please return to Broker Dashboard and the status will have changed.

If there are multiple of the same document e.g. ESIS/Offer please select the latest version.

If your application is currently showing as 'Pended' please resubmit later.

If there is no available Upload Document Type available for you to upload further documentation against, please contact us on 0345 070 1999, option 2 or send us a Secure message to request this. Please note it can take up to 48 hours for us to respond to a secure message.

Please allow 10 seconds for each document to be uploaded.

**Documents**

Direct Debit Mandate

Mortgage Declaration

Application Form

**Case Messages**

**General PCCA Response**

15:32

**Open Await Supporting Doc**

15:32

**Start Conversation**

*HINT! Documents completed as part of the DIP such as ESIS and DIP acceptance are saved with the Illustration sequence and everything else is saved with the Application sequence. To view the illustration sequence click this drop down box.*

*Select 'Payslips Resi-App1' and upload the 1<sup>st</sup> payslip, when this has been successful a green tick will appear.*

*To upload the second payslip click back to 'Case Overview' to reset the task and repeat the above, follow the same process for the final payslip to complete the task.*

*Once a document has been uploaded it can be downloaded and viewed from the 'Case Overview screen'. You will also find offer documentation here when that has been generated*

The screenshot shows the 'Case Overview' page for a mortgage application. The top navigation bar includes 'Dashboard', 'Case Overview', and '02 - Application - £100,000.00'. The main content area is divided into sections: 'Action Centre' (Submitted, PLEASE UPLOAD REQUESTED DOCUMENTS), 'Product Details' (Product Code: 2X1786T04, Product Description: 2Yr FX 5.55% £0 fee 60%), and 'Loan Details'. A modal window titled 'Upload Documents' is open, showing a list of document types: 'Bank Statement-App1', 'Future Retire Inc-App1', and 'Payslips Resi-App1'. A green checkmark is visible next to 'Payslips Resi-App1'. The 'Upload' button is highlighted. On the right side, there is a 'Help and Support' section with instructions and a 'Documents' list containing 'Bank Statement-App1', 'Payslips Resi-App1', 'Future Retire Inc-App1', 'Bank Statement-App1', 'Direct Debit Mandate', 'Mortgage Declaration', and 'Application Form'. Below that is a 'Case Messages' section with a 'General PCCA Response' message.