How to Upload Documents

For Intermediary use only

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About this Guide

This guide will provide you with an overview of how to upload supporting documentation once an application has been submitted via the broker portal.

If you need any help uploading supporting documentation or have any questions regarding our broker portal in general, please call our Online Support Team on 0800 0294 997. Lines open Monday – Friday, 9.00am – 5.00pm. Alternatively, write to our head office: 33-37 Wellington Place Belfast BT1 6HH.

How to Upload Documents – Step 1

Once an application has been submitted, you will notice a section on the application titled 'Supporting Documents'. (right-hand side, highlighted).

Click on the 'upload' button in this section.

NB: You are only enabled to upload supporting documents after an application has been submitted.

How to Upload Documents – Step 2

A window will open, entitled 'Upload Supporting Documents' with some informative text.

Click on the 'Browse' button (or alternatively drag and drop the files) to open your drive and locate the file(s) you wish to upload.

Upload Supporting Documents

When you have uploaded your clients supporting documents, please assign the appropriate document type before you save. You can browse for documents or drag and drop multiple documents.

Clear All

File Name	Type	Action

Drag and Drop files here

Maximum file size: 3MB

Supported file formats: PDF, JPG, PNG

Supported file name characters: A-Z a-z 0-9._-

Browse

Cancel   Save All

How to Upload Documents – Step 3

Locate the file(s) you wish to upload, click on that file, and click open.

NB: The maximum file size supported is **3MB**.
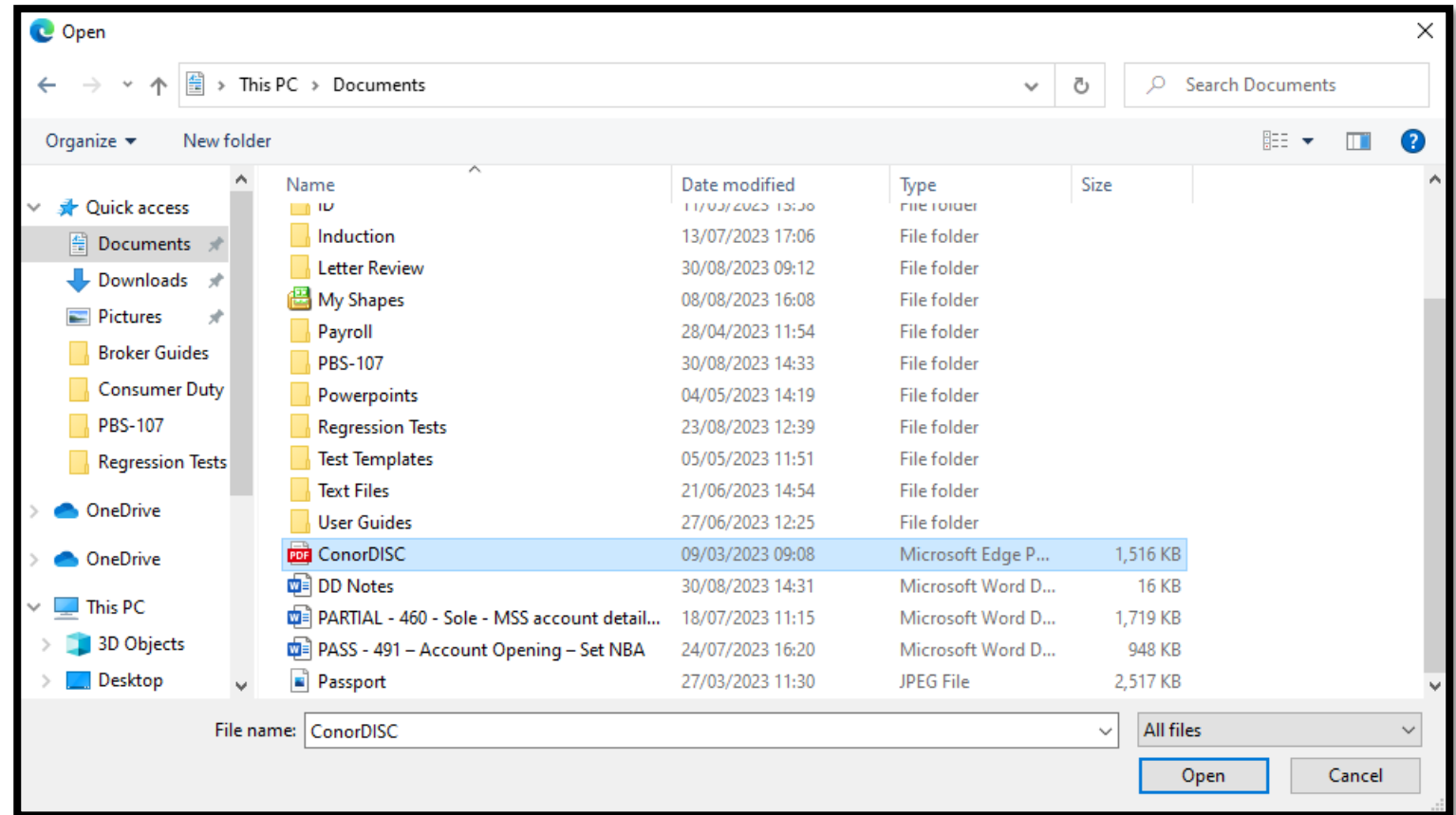
How to Upload Documents – Step 4

Ensure that the correct file(s) has been chosen and click 'Done' to confirm this.

NB: The only file formats that are supported are **PDF**, **JPG** and **PNG**.
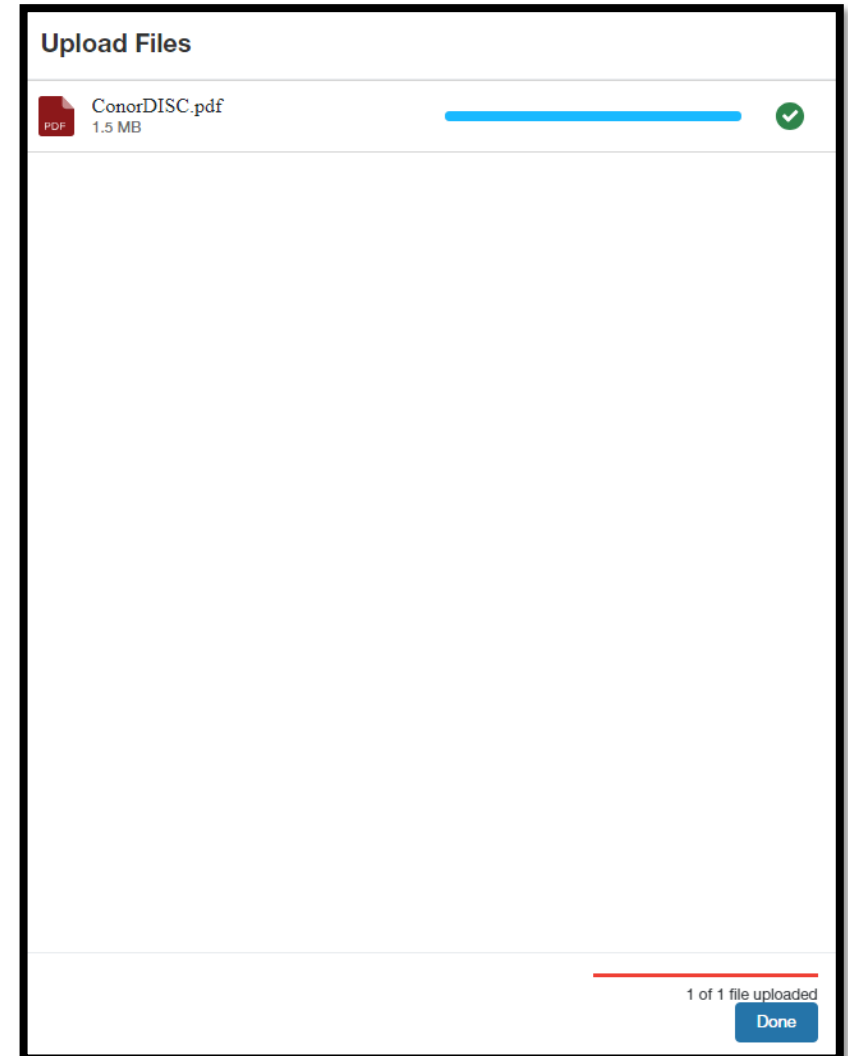
How to Upload Documents – Step 5

You will see the file(s) you have selected appear in the list under the heading 'File Name'.

In order to save these files and upload, you must choose a file type from the drop-down menu found under the heading 'Type'. To speed up the underwriting process, please ensure that you label the documents accurately. After this click 'Save All'.

You may also download the file to view before upload by clicking on the download icon, as well as delete the file if you change your mind by clicking on the bin icon.

Upload Supporting Documents   X

When you have uploaded your clients supporting documents, please assign the appropriate document type before you save. You can browse for documents or drag and drop multiple documents.   Clear All

| File Name	Type	Action
ConorDISC.pdf	--None--	⤓ 🗑

Drag and Drop files here

Maximum file size: 3MB

Supported file formats: PDF, JPG, PNG

Supported file name characters: A-Z a-z 0-9._-

Browse   Cancel   Save All

How to Upload Documents – Step 6

You will see the file(s) added to the supporting documents section. If you are satisfied that you have added the correct file(s), along with the correct respective file types, then go ahead and click upload.

Similarly to step 5, you may download the file to view before upload by clicking on the download icon, as well as delete the file if you change your mind by clicking on the bin icon.

Supporting Documents

[⬆ Upload]

Please click here for supporting documentation requirements.

Date ▾	Type ⬍	Action
01/09/2023, 12:31	Joint Bank Statement	⬇ 🗑

Show 5 ▲▼

Supporting Documentation Checklist

All types
Bank Statements - App1

All
Test type 1

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We hope you found this guide helpful and informative.

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