

# How to Upload Documents

For Intermediary use only



**PROGRESSIVE**  
BUILDING SOCIETY

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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.

### Application - 70100396101

Djed Spence Applicant Name	+447825830453 Mobile	dspence@gmail.com Email	1.29% 2 year variable discount rate Product	£70,000.00 Loan Amount	20y 0m Term
£482.71 Estimated Monthly Repayment	Submitted Status				

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#### Client Information

##### Main Applicant - Djed Spence

[Hide Information](#)

Title	Mr	Date of Birth	10/09/1989
First Name	Djed	Marital Status	Single
Middle Names		What gender was your Client assigned at birth?	Male
Previous Names		Email	dspence@gmail.com
Surname	Spence	Mobile Phone	+447825830453
		Nationality	British
		National Insurance Number	PE342526D

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#### Additional Client Details

Do your client(s) own any other property either outright or with a mortgage?

Please give details here

If your client(s) have existing property, is this property being sold?

If your client(s) are selling an existing property, what is the sale price of this property?

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#### Supporting Documents

Please click [here](#) for supporting documentation requirements.

There are no documents available

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#### Product Selection

Product	1.29% 2 year variable discount rate	Loan Amount	£70,000.00
Deposit Amount	£30,000.00	Term	20y 0m
Estimated Monthly Repayment	£482.71		

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#### Property & Valuation

##### Property Information

Address Line 1	Progressive Bldg Soc	Address Line 4	BELFAST
Address Line 2	Progressive House	Address Line 5	
Address Line 3	33-37 Wellington Place	Post code	BT1 6HH

# 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
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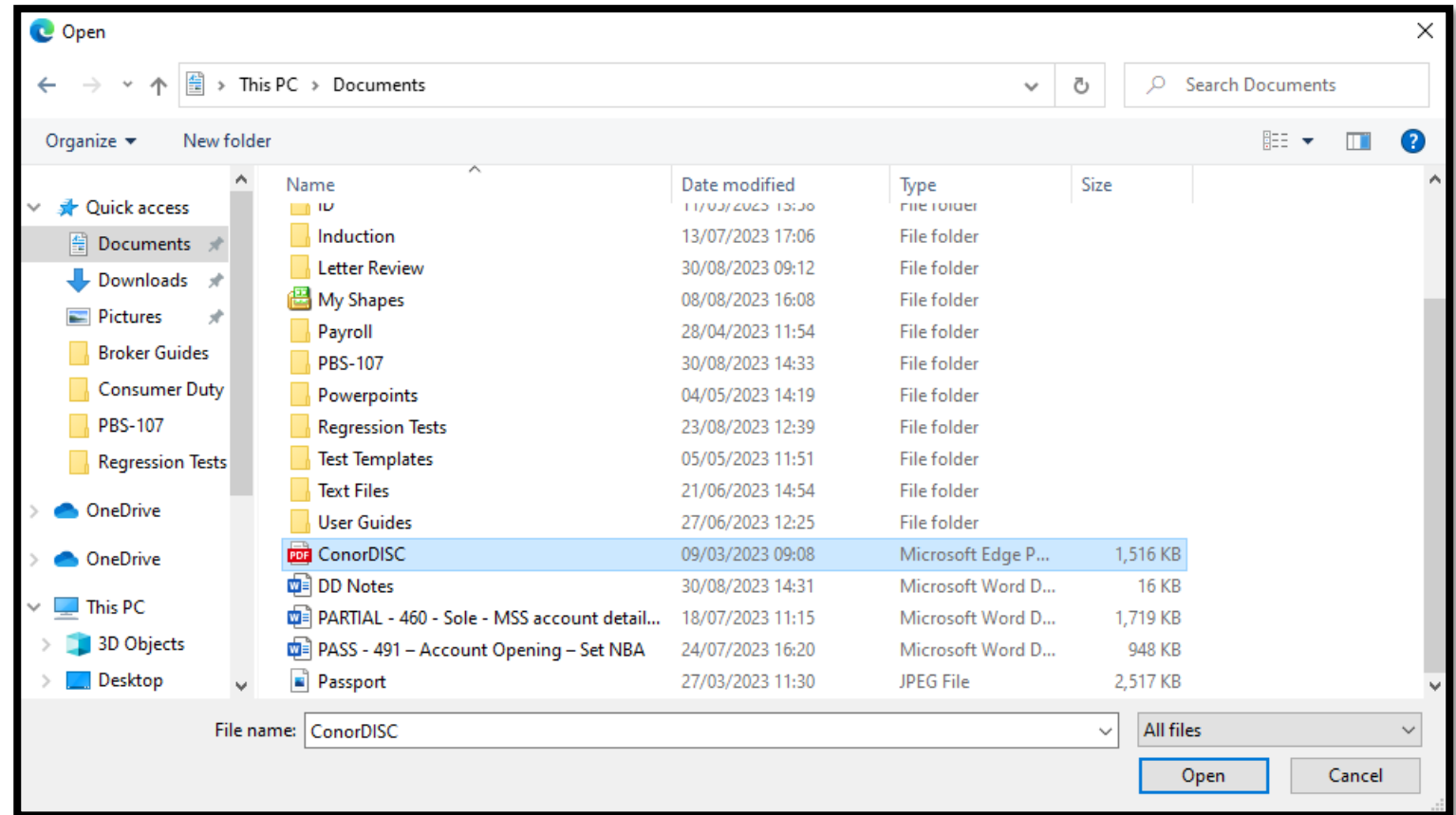
**Drag and Drop files here**  
Maximum file size: 3MB  
Supported file formats: PDF, JPG, PNG  
Supported file name characters: A-Z a-z 0-9.\_-

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.

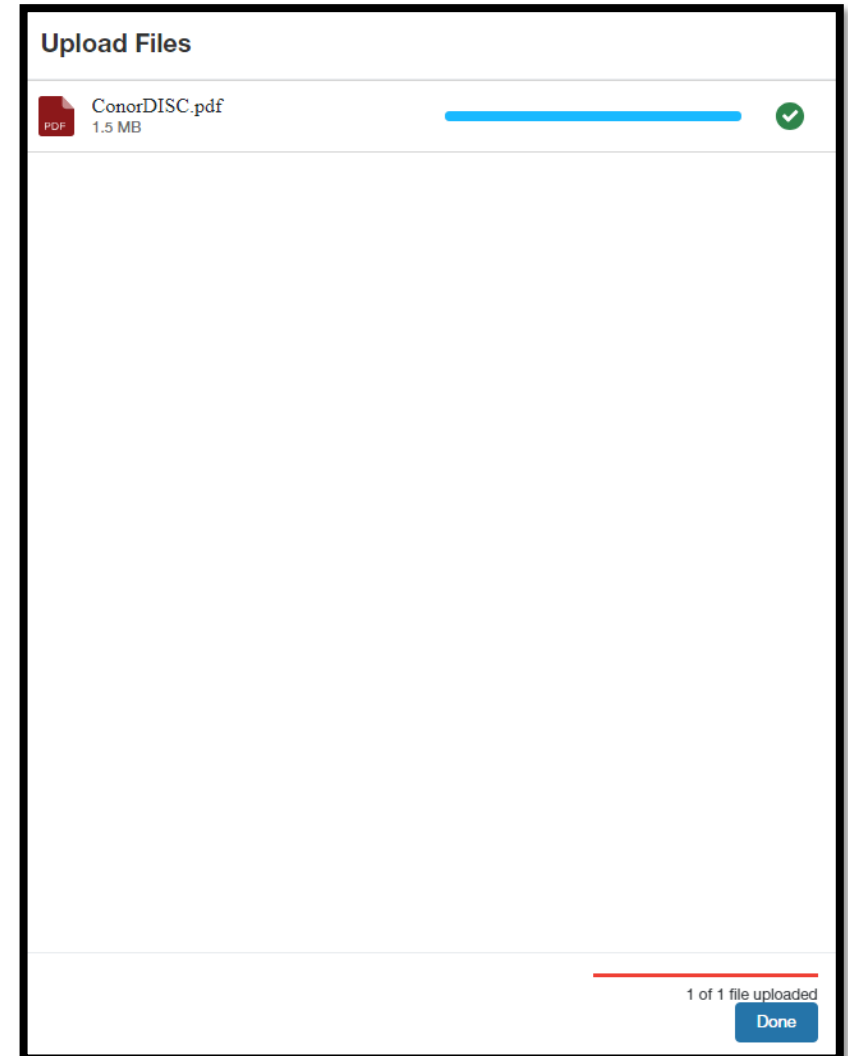
**NB:** The maximum file size supported is **3MB**.



# 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

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

Please click [here](#) for supporting documentation requirements.

 Upload

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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