

How to Upload Documents

For Intermediary use only



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.

To allow our teams to underwrite your Clients application swiftly, please ensure that you upload documentation swiftly after submission and that bank statements are straight and with no highlight, stamps or other marks.

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'.

Click on the 'upload' button in this section.

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

Supporting Documents

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

[Upload](#)

Date	Type	Options
29/04/2025	Accounts - App1	Download Delete

« < Showing 1 of 1 Page(s) > » Show: 10

Supporting Documentation Checklist

All types
Bank Statements - App1

All
Test type 1

How to upload Documents - Step 2

A window will open, titled 'Upload Supporting Documents'.

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.

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

NB: The maximum file size supported is 3MB.

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	Options
No documents selected. Please upload your first document.		

Upload Files Or drop files

Cancel Save All

Email claire@testinalways.pbsuat.tes All types

How to upload Documents - Step 3

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'. 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	Options
How-to-Upload-Documents.pdf	Choose an Option	Download Delete

Upload Files Or drop files Cancel Save All

How to upload Documents - Step 4

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.

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 delete

The screenshot displays the 'Upload Supporting Documents' section of a web application. At the top, there is a header 'Upload Supporting Documents' and a red-bordered box containing instructions: '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.' To the right of this text is a 'Clear All' button. Below the instructions is a table with three columns: 'File Name', 'Type', and 'Options'. The first row contains the file 'How-to-Upload-Documents.pdf'. The 'Type' column for this file has a dropdown menu open, showing a list of document categories: 'Accounts - App1', 'Accounts - App2', 'Proof Of Address - App 1', 'Proof Of Address - App 2', 'Architects Correspondence', 'Building Control Approval', 'Bank Statements - App1', 'Bank Statements - App2', 'Credit Union Information', 'Existing Debt Statements', 'Proof Of Deposit', and 'Deeds Site Map'. To the right of the table, there are 'Download' and 'Delete' buttons for each row. Below the table, there is an 'Upload Files' button with an upload icon and the text 'Or drop files'. To the right of this is a 'Save All' button. In the background, a form with various fields is visible, including 'Email', 'Mobile Phone', 'Nationality', and 'National Insurance Number'.

File Name	Type	Options
How-to-Upload-Documents.pdf	Choose an Option	Download Delete

- Accounts - App1
- Accounts - App2
- Proof Of Address - App 1
- Proof Of Address - App 2
- Architects Correspondence
- Building Control Approval
- Bank Statements - App1
- Bank Statements - App2
- Credit Union Information
- Existing Debt Statements
- Proof Of Deposit
- Deeds Site Map