Plenti

Uploading and downloading documents

step-by-step guide

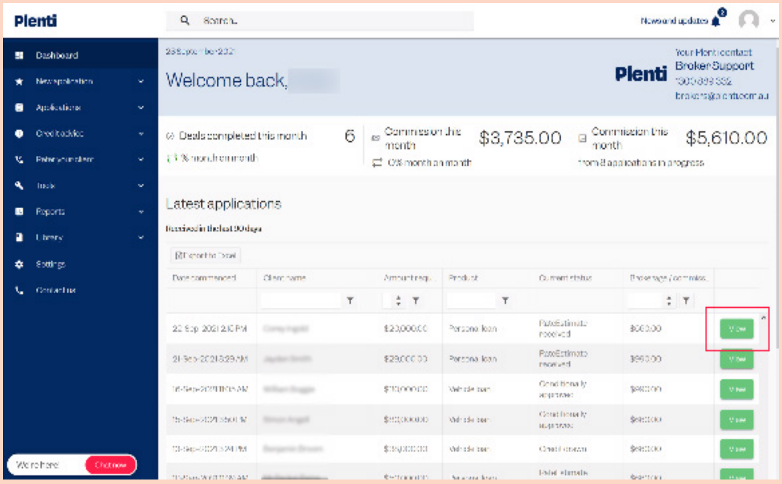
Document upload/downloads

Document upload process - personal lending

1

View application

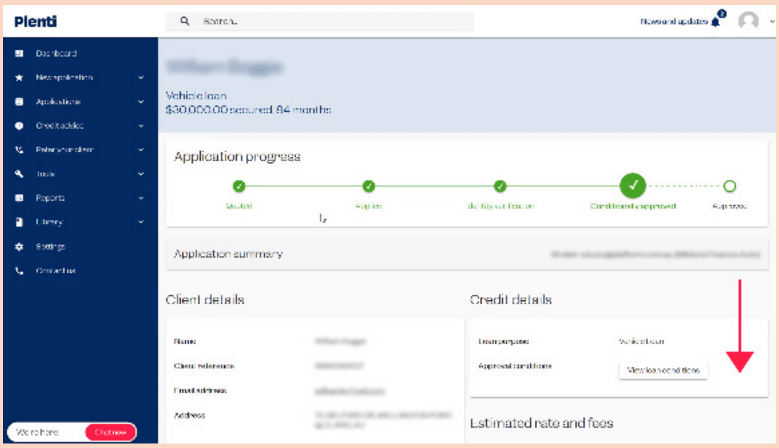
Log into the broker portal and click 'View' on the desired application.



2

Scroll down application page

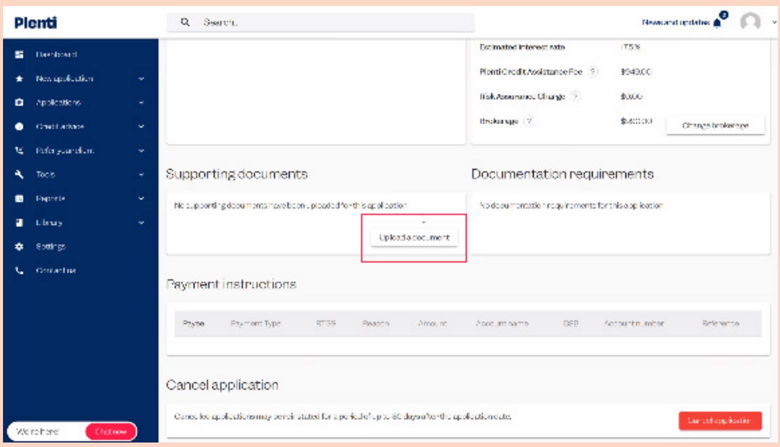
When you arrive to the selected application, scroll down the page to view the option for uploading documents.



3

Select 'Upload a document'

Under the 'Supporting documents' section, you should see an option to upload a document. Click this button to continue.

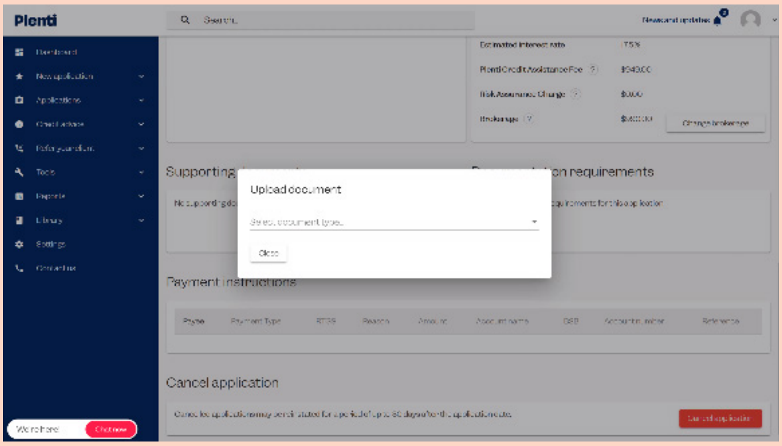


Document upload process

4

Upload document

A dialog box will open up requesting the document type. You can then select the desired document and upload.



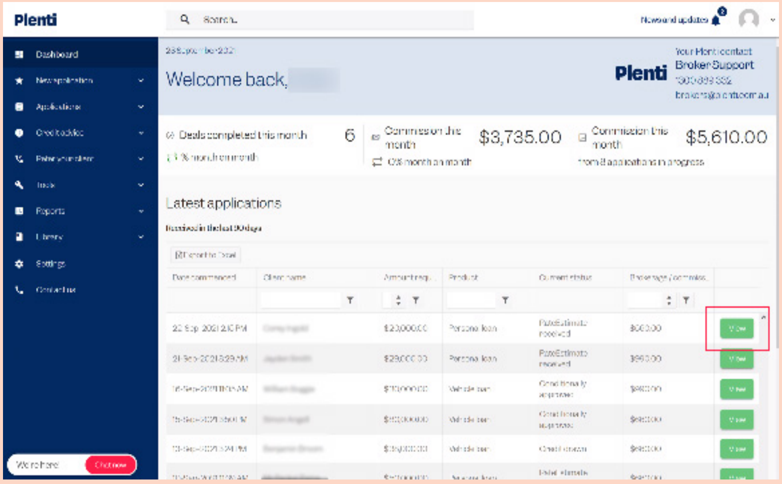
Document upload/downloads

Document upload process - automotive lending

1

View application

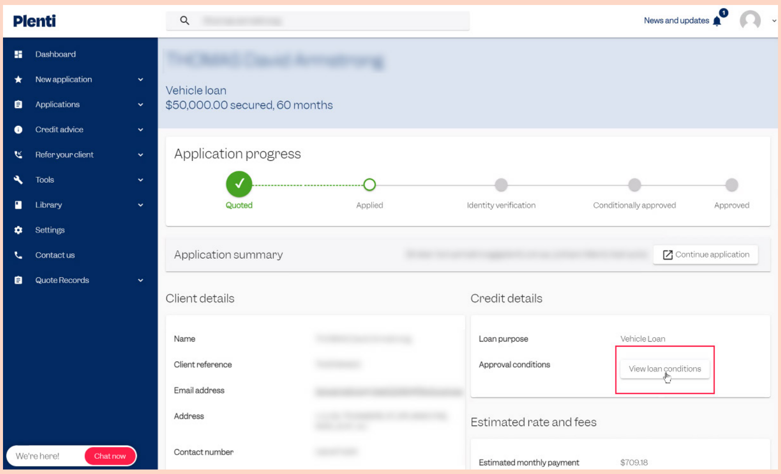
Log into the broker portal and click 'View' on the desired application.



2

View loan conditions

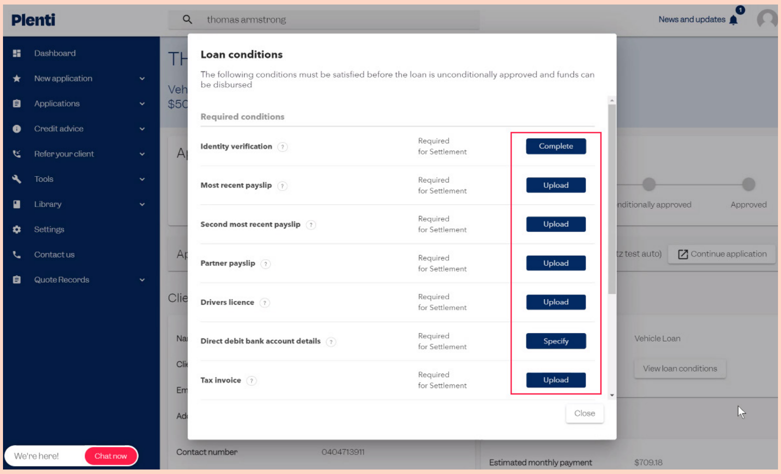
When you arrive to the selected application, scroll down the page to view the option for viewing loan conditions.



3

Select 'Upload' on the preferred loan condition

A pop-up will appear displaying the various loan conditions. Select 'upload' on the loan condition where a document upload is required.

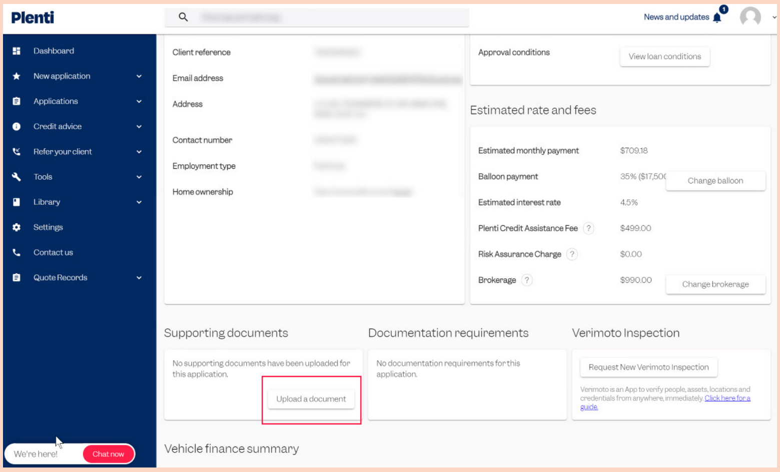


4

Supporting documents

There is also the option to upload supporting documents.

This can be achieved by scrolling down to the 'Supporting Documents' section of the application and selecting the 'Upload a document' button.

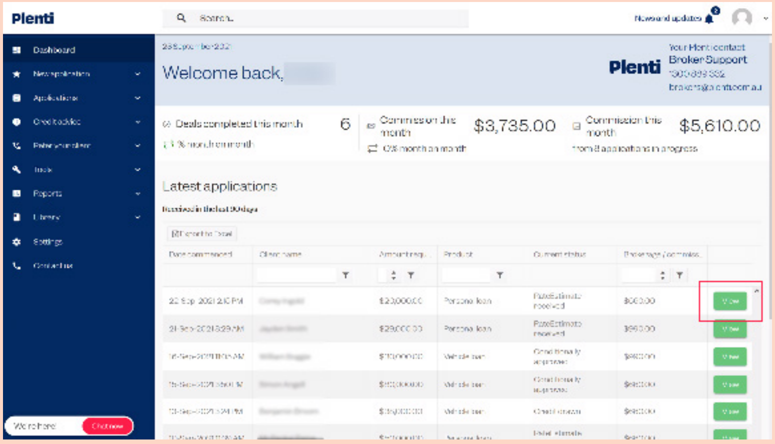


Document download process

1

View settled application

Log into the [broker portal]() and click ‘View’ on the desired settled application.



2

Download document

Navigate to the right-hand side of the selected settled application screen.

Under ‘Credit details’ there is an option to download the contract.

Note: this option only becomes available once loan is drawn.