

# APPLYONLINE<sup>®</sup> SUPPORTING DOCUMENTS SERVICE

## Quick reference guide

Prepared: 10 January 2018

# ApplyOnline® Supporting Documents service – quick reference guide

## Submission Checklist

**Enable application submission**  
Ensure all mandatory items marked with "icons" have been actioned.

**Bulk attach to all conditions**  
To bulk attach to all conditions at once, select the checkbox in the checklist header.  
'Attach' or drag and drop documents from the checklist header.

**Self-verify all**  
Select checkbox in checklist header, then select 'self-verify'.

**Attach and self-verify**  
Mandatory condition(s) that require the documents to be self-verified.

**Attach, no exceptions allowed**  
Mandatory condition which does not allow exceptions.

The screenshot displays the 'Submission checklist' interface. At the top, there is a navigation bar with tabs for Summary, Applicants, Loan Details, Security, Financial Position, Loan Summary, Other Products, Supporting Docs, Status Tracking, and Internal Notes. Below this, the application ID (7597720) and applicant name (Mr John Smith) are shown. The main area contains a checklist with four items:

- Personal Consent** (John Smith): Includes a 'Personal Consent Form' document. A 'Merged.pdf' document is attached and marked as 'Attached'. Actions: Self-verify, Attach, Exception.
- Broker Declaration** (Application #2004922): Includes a 'Broker Declaration' document. Action: Attach, Exception.
- Serviceability Calculator** (Application #2004922): Includes a 'Serviceability Calculator' document. Action: Attach, Exception, Defer. An 'Edit/Preview' button is highlighted.
- PAYG Income (Base)** (John Smith): Includes a 'Paylip' document. Action: Attach, Exception, Defer.

At the top right of the checklist, there is a 'Send Checklist to Lender' button. The interface also shows a 'Self-verify (1)' indicator and a 'View library documents' link.

Send checklist to lender once all conditions are satisfied. NOTE: If only mandatory conditions have been actioned use the 'Submit' button located at the top in the menu bar.

Attach documents via 'Attach' button or drag and drop to the condition.

Self-verifying pages of attached documents for mandatory condition(s).

**Redact and highlight**  
Hover over the document and select 'Edit/Preview'. This will magnify the document and give you options to redact and highlight.

**Defer to approval checklist**  
Defer allows a user to defer a condition to the approval checklist to action after the application has been submitted, at a later date.

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Ensure all mandatory items marked with "icons" have been actioned.

**Bulk attach to all conditions**  
To bulk attach to all conditions at once, select the checkbox in the checklist header.  
'Attach' or drag and drop documents from the checklist header.

The screenshot shows a web application interface for a 'Submission Checklist'. At the top, there is a navigation bar with tabs for 'Summary', 'Applicants', 'Loan Details', 'Security', 'Financial Position', 'Loan Summary', 'Other Products', 'Supporting Docs', 'Status Tracking', and 'Internal Notes'. Below this is a header area with a 'Send Checklist to Lender' button and a progress indicator for the checklist (1/6). The main content area is divided into four sections, each representing a condition:

- Identification**: Includes a checkbox, a text input field for 'Smith', and an 'Attach' button.
- Home Loan Application Form**: Includes a checkbox, a text input field for 'Home Loan On-Boarding Application Form', and an 'Attach' button.
- Serviceability Calculator Worksheet**: Includes a checkbox, a text input field for 'Serviceability Calculator', and buttons for 'Self-verify', 'Attach', 'Exception', 'Edit/Preview', and 'Remove'. A 'Attached' status is shown below the buttons.
- Funds to complete**: Includes a checkbox, a text input field for 'Bank Statement', and an 'Attach' button.

Send checklist to lender once all conditions are satisfied.

Attach documents via 'Attach' button or drag and drop to the condition.

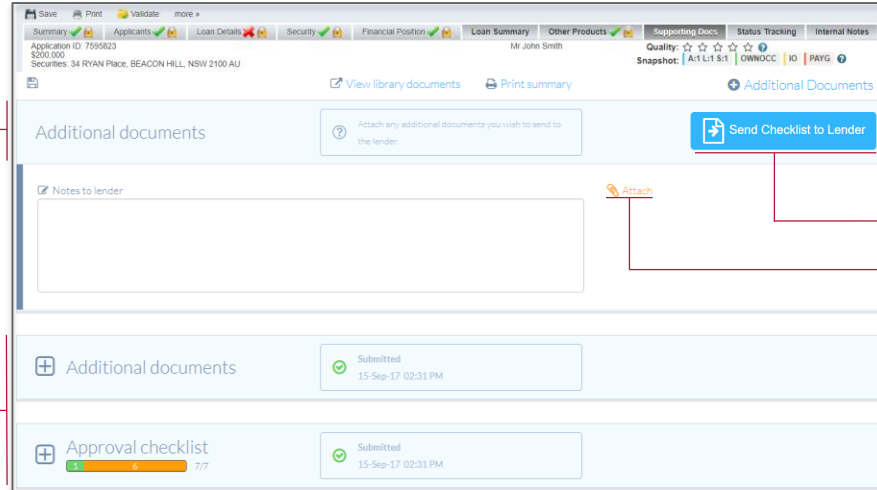
**Redact and highlight**  
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## Additional Documents

**Additional Documents**  
This condition will allow multiple submissions.

Confirmation that the checklists have been submitted successfully.



Additional Documents  
The hyperlink we re appear after the "Additional Documents" condition has been sent to lender.

Send checklist to lender once condition has been satisfied.

Attach documents via 'Attach' button or drag and drop to the condition.