

# BM SOLUTIONS MORTGAGE PORTAL

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Uploading Documents Guide

For the use of mortgage intermediaries and other professionals only

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[bmsolutions.co.uk](https://bmsolutions.co.uk)

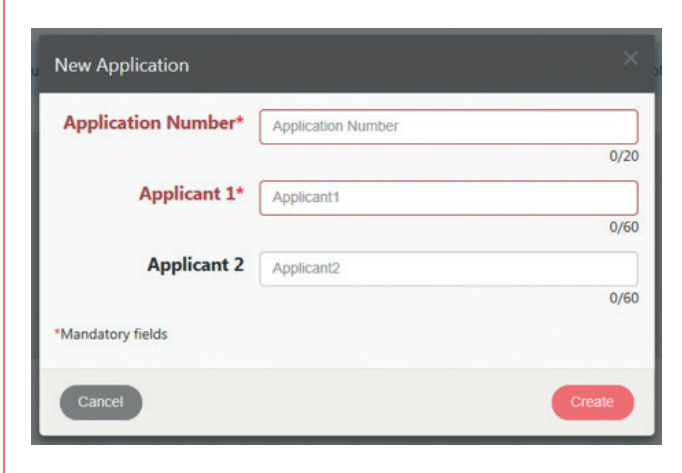
**BM SOLUTIONS**  
FROM BIRMINGHAM MIDSHIRES

# NEW APPLICATION – UPLOADING DOCUMENTS

- Upon selecting New Application you will be prompted to enter the Application Number and Applicant. These are mandatory fields. Complete them using the following format:
  - Application Number – BM account numbers are 11 digits long (usually starting 200...). If you have submitted a paper based application and have not yet received an application number, then type 'Paper application'. This will be corrected by us once the application number is known
  - Applicant 1 – first and surname of primary applicant (e.g. Jane Smith)
  - Applicant 2 – first and surname of second applicant (if applicable). If there are three or four applicants, the additional names can be added later via the Existing Applications screen
- Click **Create** to open the New Application screen – at this point a new case is created to upload the documents to

**Note:** You create one new application on the BM Solutions Mortgage Portal per mortgage application (whether you have one, two, three or four applicants)

- You can create an application onto the portal without uploading documents. This allows you to benefit from the case tracking and secure message functions as detailed later in this guide
- **A great feature of the new portal allows you to take a photo of a document and upload via the mobile view of BM Solutions Mortgage Portal**

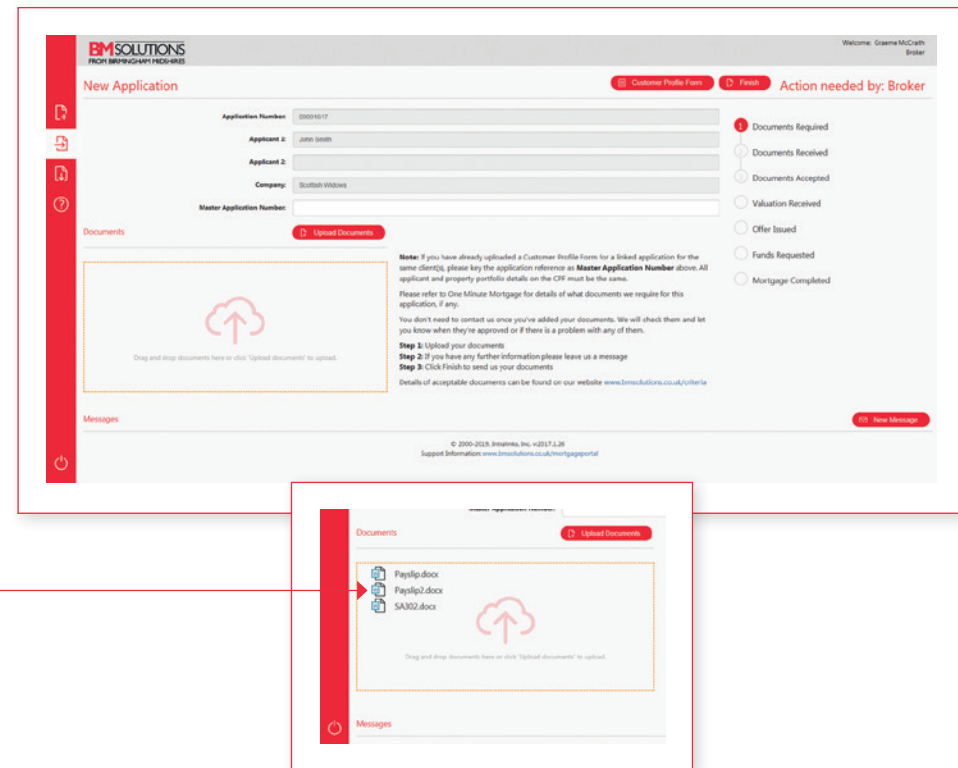


The screenshot shows a 'New Application' form with the following fields and controls:

- Application Number\***: Input field with placeholder 'Application Number' and character count '0/20'.
- Applicant 1\***: Input field with placeholder 'Applicant1' and character count '0/60'.
- Applicant 2**: Input field with placeholder 'Applicant2' and character count '0/60'.
- Mandatory fields**: A red asterisk indicates that the first two fields are mandatory.
- Buttons**: A grey 'Cancel' button and a red 'Create' button are located at the bottom of the form.

# NEW APPLICATION – UPLOADING DOCUMENTS

- To upload documents either click on **Upload Documents** to open a browse window or utilise the drag and drop area
- Note:** Multiple documents can be selected from the browse window, by holding down the **Ctrl** key on your keyboard and clicking the required documents to highlight them. You can upload up to 20 documents at a time
- The documents you have uploaded for submission will be displayed in the drag and drop area with the same file name as you have saved locally. Uploaded documents are autosaved in the portal
- To delete a document uploaded in error, click on the document and a prompt will appear. Select **Delete** and then click **Yes** on the confirmation message
- Click **Finish** (at the top of the screen) to finish. The Existing Applications screen will be displayed



This information is available in large print, Braille or on audio. Customers can also contact us by using Text Relay.

**Important information**

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