

BM SOLUTIONS

A GUIDE TO UPLOADING YOUR DOCUMENTS

For the use of mortgage intermediaries and other professionals only

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BM SOLUTIONS
FROM BIRMINGHAM MIDSHIRES

PLEASE FOLLOW THE STEPS BELOW IF YOU ARE UPLOADING DOCUMENTS FOR AN APPLICATION

8 step guide to our document upload system

1

When you submit an application click on the 'Upload Documents' button at the bottom of the page to take you to the Upload Document page.

2

To upload the document, click the blue text link within the grey box to browse for your files.

3

Select the file you wish to upload and select open.

4

Select the appropriate document type from the drop down box for the document you have selected.

5

Select 'Upload'. If you need to upload multiple documents repeat the last 3 steps. Once all the required documents are uploaded you are now ready to submit these documents in batches of 10 at a time to our Broker Support Team.

6

Select 'Submit documents'.

7

A message will appear on screen "Are you sure you want to submit the document(s)?". Click 'Submit document(s)' or click 'Cancel' to save and resume later.

8

Follow our next steps guidance.

Next Steps

- **There's no requirement to contact us.** A member of our Broker Support Team will contact you once your document(s) have been processed.
- For existing applications where you wish to upload further documentation:
 - On the home page select the submitted application you wish to attach documents to. This will take you to the application summary screen for the case selected.
- Select the 'Upload Documents' tab and follow from step 2 of the 8 steps on the previous page to upload your documents.

Helpful Tips

- Applications must be fully submitted and all fees paid before the document upload service becomes visible.
- If Portfolio Landlord Information is required for your application this will need to be completed on the Mortgage Portal. Please refer to our **Completing portfolio landlord Information Guide** for steps on how to complete this.
- If you are experiencing issues uploading your documents please follow the steps below.
- If an error appears on screen before you try to upload documents click the refresh button on your webpage until the error disappears.
- Amalgamate documents by customer and document type to one file e.g. Payslips for App 1 to one file, Payslips for App 2 to a second file.
- File names should not include special characters and should not be password protected.
- 60 files up to 10MB each can be submitted per case.
- Acceptable file formats: PEG, JPG, BMP, TIFF, TIF, PDF.
- Browser compatibility: IE10, IE11, Edge, Firefox, Chrome, Safari.

If the above steps have not worked, Open the document, select 'Print', then in the Printer dropdown select 'Print to PDF' and then press 'Print' at the bottom of the screen. This will open up your File Explorer. Enter a file name and then save. You will then be able to upload the newly saved document.

- In the unlikely event you experience a technical issue please call 0345 124 1388.

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