



Choose less inbox with DocBox.

More secure than emails, with fewer back and forths filling up your inbox. DocBox provides a safe and easy alternative for sharing supporting documents.

A new addition to our Broker Portal, DocBox was developed bespoke for our brokers, with our brokers, allowing them to upload all documents relating to a customer's application in one centralisation location. The functionality of the tool includes the ability to:

- Drag and drop documents all at once;
- Automatically have individual documents categorised according to the document name;
- Be notified of any errors (file type or size) before submitting and given the opportunity to correct them.

Step 1

Once you've opened Active Applications, select the relevant application that requires supporting documents. You can click anywhere in the box to launch the application.

The screenshot shows the Bankwest 'Active Applications' page. The header includes the Bankwest logo, navigation tabs for 'Retail' and 'Business', and a 'Logout' button. A secondary navigation bar contains 'Products', 'Policies', 'Tools & resources', 'Active applications', 'Existing loans', 'Valuations Tool', and a search bar. The main content area is titled 'Active Applications' and displays a list of five application cards. Each card shows an application ID, the applicant's name, the loan amount, the latest update time, and the application status. The third card, for 'Mr Ben BAKER' with a \$200,000 loan, is highlighted in dark blue and is the focus of the step.

Application ID	Applicant Name	Loan Amount	Latest Update	Status
10558602	Mr Ddqj TOSCALIXIVDVQC	\$100,000	5 hours ago	Approved in Principle
31044722	Lisa PDENOVGOOD		6 hours ago	Verifying Application
10558598	Mr Ben BAKER	\$200,000	6 hours ago	Verifying Application
31044719	Secbakwestdeal ELIGIBLE, Uattesting ELIGIBLE		8 hours ago	Verifying Application
10558543	Mr Qvuw TOSCALIXIDJSNI	\$100,000	3 days ago	Disbursed

Step 2


Once the application opens, the Application Details page will display. Simply click the Submit Documents button to begin the upload process.

The screenshot shows the 'Application Details' page for application 10558598. The header is identical to the previous screenshot. The main content area is titled 'Application Details' and includes a breadcrumb link back to 'Active Applications'. The page is divided into several sections: 'Applicants' (showing Ben BAKER's contact and address), 'Home loan products' (a table with columns for Limit, Product, Loan type, Loan term, and Payment type), 'Security' (showing the address and a note about the building insurance certificate), 'Status' (showing 'Verifying Application' with a 'Submit Documents' button), 'Submission History', 'Support' (with contact information for the Mortgage Support Team), and 'Notes' (showing no notes are present).

Limit	Product	Loan type	Loan term	Payment type
\$200,000	Complete Fixed	Owner Occ	25 years	Principal and Interest

Step 3


From the DocBox page you can drag and drop multiple documents or select Choose files and upload from your documents. The additional notes field is optional, and has a character limit of 500 if you would like to leave commentary for your case owner.

Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

Upload Documents
Drag and drop your documents or click 'Choose files' to upload. Make sure you use an acceptable file type. [?](#)

 **Drag and drop your files to upload**
Maximum 15MB per file

Choose files

Additional notes (optional)
If you have any comments about the documents you've uploaded above, you can let us know here.

Comments here

0/10000

Application ID: 12766323

Fourpvt ICP-ARMOURY

Document submission progress


- Upload documents
- Categorise and submit documents

Save and exit

Next

Once all documents have been uploaded, you will be able to see them in an expandable list. You can easily remove documents by clicking the blue cross to the right of the document name.


If you need to exit your application and return later on, simply click Save and exit and your application will be saved for when you return.

Close










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Upload Documents
Drag and drop your documents or click 'Choose files' to upload. Make sure you use an acceptable file type. [?](#)

 **Drag and drop your files to upload**
Maximum 15MB per file

Choose files

Document name	9 files
Vaulationas.pdf	11KB - 24/08/2022 
AVM.pdf	11KB - 24/08/2022 
Bankwest Serviceability Calculator - 12 August 2022.xlsm	650KB - 24/08/2022 
Contract of Sale.pdf	13KB - 24/08/2022 
Drivers License.jpg	2MB - 24/08/2022 
Passport.jpeg	2MB - 24/08/2022 
Payslip 1.pdf	13KB - 24/08/2022 
Payslip 2.pdf	12KB - 24/08/2022 
Valuation.pdf	11KB - 24/08/2022 

Additional notes (optional)
If you have any comments about the documents you've uploaded above, you can let us know here.

Comments here

0/10000

Application ID: 12766323

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Document submission progress

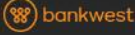
- Upload documents
- Categorise and submit documents

Save and exit

Next

Step 3 continued

Before clicking next, we will notify you if any documents are unable to be uploaded. These will appear with a red progress bar and an error message, letting you know why the document was not uploaded. You will need to remove the file/s before you can submit.


Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

Upload Documents




Drag and drop your documents or click 'Choose files' to upload. Make sure you use an acceptable file type. [?](#)



Drag and drop your files to upload

Maximum 15MB per file

Choose files

Document name	12 files
ID.mp4 Upload error  This file exceeds the 15MB maximum file size.	✕
Customer portfolio.pptx Upload error  This file type isn't supported.	✕
Transaction history.csv Upload error  This file type isn't supported.	✕
Vaulationas.pdf 11KB - 24/08/2022	✕
AVM.pdf 11KB - 24/08/2022	✕
Bankwest Serviceability Calculator - 12 August 2022.xlsm 650KB - 24/08/2022	✕
Contract of Sale.pdf 19KB - 24/08/2022	✕
Drivers License.jpg 2MB - 24/08/2022	✕
Passport.jpeg 2MB - 24/08/2022	✕
Payslip 1.pdf 19KB - 24/08/2022	✕

View all 12 files

Application ID: 12766323

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Document submission progress

- Upload documents
- Categorise and submit documents

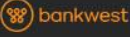
Save and exit

Reasons why a document might not upload:

File exceeds 15mb, file type isn't supported, document is password protected, file is corrupt or trouble uploading (option to retry).

Step 3 continued

Once all documents have successfully uploaded, a list will be formed, including any additional notes. Click next to move to the categorisation step.

Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

Upload Documents

Drag and drop your documents or click "Choose files" to upload. Make sure you use an acceptable file type. [?](#)

Drag and drop your files to upload
Maximum 15MB per file

Choose files

Document name	9 files
Vaulationas.pdf 11KB - 24/08/2022	✕
AVM.pdf 11KB - 24/08/2022	✕
Bankwest Serviceability Calculator - 12 August 2022.xlsm 650KB - 24/08/2022	✕
Contract of Sale.pdf 19KB - 24/08/2022	✕
Drivers License.jpg 2MB - 24/08/2022	✕
Passport.jpeg 2MB - 24/08/2022	✕
Payslip 1.pdf 19KB - 24/08/2022	✕
Payslip 2.pdf 19KB - 24/08/2022	✕
Valuation.pdf 11KB - 24/08/2022	✕

Application ID: 12766323

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Document submission progress

- Upload documents
- Categorise and submit documents

Save and exit

Additional notes (optional)

If you have any comments about the documents you've uploaded above, you can let us know here.

Comments here


Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

445/10000

Next

Step 4

In the categorisation step, document types may automatically categorise based on the Document Name. If the auto categorisation is incorrect, the document type can be changed from the drop down menu.

Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

Documents to be categorised
Please categorise your files by selecting the relevant document type from the drop down.

Please Note:
The below documents need to be categorised into document types before you can submit this application. Please select the document type from the drop downs below.

Document Name	Document Type
AVM.pdf 11KB - 24/08/2022	select a document type Valuation
Bankwest Serviceability Calculator - 12 August 2022.xlsm 650KB - 24/08/2022	select a document type Serviceability Calculator
Drivers License.jpg 2MB - 24/08/2022	select a document type Driver's Licence
Passport.jpeg 2MB - 24/08/2022	select a document type Passport
Payslip 1.pdf 18KB - 24/08/2022	select a document type Payslip
Payslip 2.pdf 18KB - 24/08/2022	select a document type Payslip
Valuation.pdf 11KB - 24/08/2022	select a document type Valuation
Vaulationas.pdf 11KB - 24/08/2022	select a document type
Contract of Sale.pdf 18KB - 24/08/2022	select a document type

Go back Submit

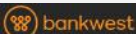
Application ID: 12766323
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Document submission progress

- Upload documents
- Categorise and submit documents

Save and exit

You can also search for a category by typing into the text box and selecting from the drop down menu. All blank documents must be categorised before submitting.

Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

Documents to be categorised
Please categorise your files by selecting the relevant document type from the drop down.

Please Note:
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Document Name	Document Type
AVM.pdf 11KB - 24/08/2022	select a document type Valuation
Bankwest Serviceability Calculator - 12 August 2022.xlsm 650KB - 24/08/2022	select a document type Serviceability Calculator
Drivers License.jpg 2MB - 24/08/2022	select a document type Driver's Licence
Passport.jpeg 2MB - 24/08/2022	select a document type Passport
Payslip 1.pdf 18KB - 24/08/2022	select a document type Payslip
Payslip 2.pdf 18KB - 24/08/2022	select a document type Payslip
Valuation.pdf 11KB - 24/08/2022	select a document type Valuation
Vaulationas.pdf 11KB - 24/08/2022	select a document type Valu
Contract of Sale.pdf 18KB - 24/08/2022	select a document type Security Valuation

Go back Submit

Application ID: 12766323
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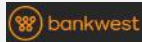
Document submission progress

- Upload documents
- Categorise and submit documents

Save and exit

Step 4 continued

Once all document types have been correctly categorised, click Submit.



Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

Documents to be categorised

Please categorise your files by selecting the relevant document type from the drop down.



Please Note:

The below documents need to be categorised into document types before you can submit this application. Please select the document type from the drop downs below.

Document Name	Document Type
AVM.pdf 11KB - 24/08/2022	select a document type Valuation
Bankwest Serviceability Calculator - 12 August 2022.xlsx 650KB - 24/08/2022	select a document type Serviceability Calculator
Drivers License.jpg 2MB - 24/08/2022	select a document type Driver's Licence
Passport.jpeg 2MB - 24/08/2022	select a document type Passport
Payslip 1.pdf 12KB - 24/08/2022	select a document type Payslip
Payslip 2.pdf 12KB - 24/08/2022	select a document type Payslip
Valuation.pdf 11KB - 24/08/2022	select a document type Valuation
Vaulationas.pdf 11KB - 24/08/2022	select a document type Valuation
Contract of Sale.pdf 12KB - 24/08/2022	select a document type Contract of Sale/Offer & Acceptance

Go back

Submit

Application ID: 12766323

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Document submission progress

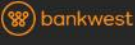
- Upload documents
- Categorise and submit documents

Save and exit

Step 5


Congratulations, you have successfully uploaded your documents to DocBox.

Review the application's Submission History by selecting [Go to submission history](#) or return to [Active Applications](#) to submit more documents.

Close

DocBox

Your tool for submitting clients' application documents easily and hassle-free.

 **We're onto it**

Thanks for submitting your application documents and/or additional notes.

Next Steps

Our team will be in touch. You can also return to this application anytime to view your submission history, submit more documents or add a note.

If you have any questions, please contact your Broker Development Manager.

Application ID: 12766323

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Upload History

Vaulationas.pdf
24/08/2022 09:57 pm

AVM.pdf
24/08/2022 09:57 pm

Bankwest Serviceability Calculator - 12 August 2022.xlsm
24/08/2022 09:57 pm



[Go to submission history](#)

Close

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Submission history
Review files you've submitted as part of this application.

Doc ID 	Document name	Date submitted	Document type
12766323-183	Vaulationas.pdf	24/08/2022	Valuation
12766323-187	AVM.pdf	24/08/2022	Valuation
12766323-191	Bankwest Serviceability Calculator - 12 August 2022.xlsm	24/08/2022	Serviceability Calculator
12766323-189	Contract of Sale.pdf	24/08/2022	Contract of Sale/Offer & Acceptance
12766323-182	Drivers License.jpg	24/08/2022	Driver's Licence
12766323-186	Passport.jpeg	24/08/2022	Passport
12766323-185	Payslip 1.pdf	24/08/2022	Payslip
12766323-184	Payslip 2.pdf	24/08/2022	Payslip
12766323-188	Valuation.pdf	24/08/2022	Valuation
12766323-190	Additional Notes	24/08/2022	Notes/Comments 

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Application ID: 12766323

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