

# Clicktrack - uploading documents

Uploading your documents is easy, just click on 'Track your applications'

[Main menu](#) | [Log out](#) | [Products](#)

### New client

- New pre-sale KFI
- New decision
- New application

### Existing client

- View or amend pre-sale KFI / decision / application
- New pre-sale KFI / decision / application

### Clicktrack


- Track your applications
- Clicktrack Demo

### Your account

- Personal profile
- Security
- Proc fee scale
- Terms of business

### Additional info

- Click user guide



Select the account you want to upload to

[Main menu](#) | [Log out](#) | [Products](#)

## Find an application

Surname (?)

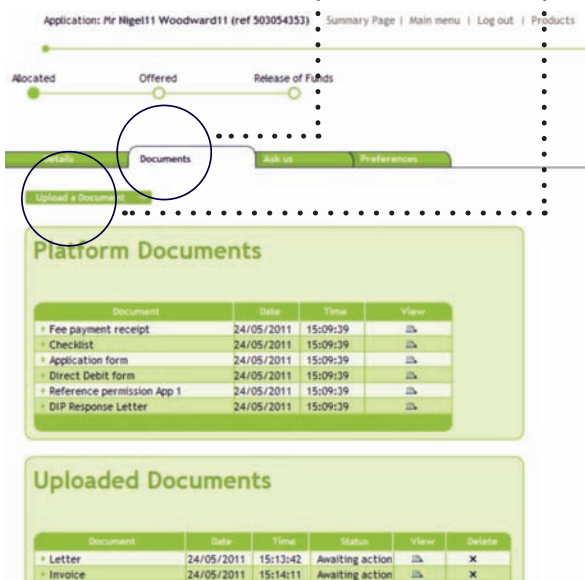
Or reference number (?)

Show active  Show updated only  Show all

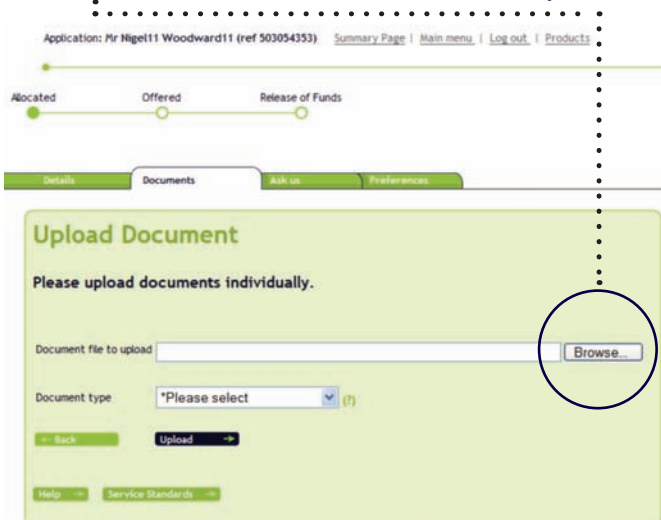
Name	Updated	Application	Postcode	Loan Amount	Status	
▶ Woodward11, Nigel11		503054469	PE27 4TE	50,000.00	Allocated	View
▶ Woodward11, Nigel11		503054400	CO3 8WQ	112,500.00	Allocated	View
▶ Woodward11, Nigel11		503054353	PE27 4TE	112,500.00	Allocated	View
▶ Woodward11, Nigel11		503052164	PE27 3YA	175,500.00	Allocated	View

# Clicktrack - uploading documents

Go straight to the documents tab and click the button to start uploading



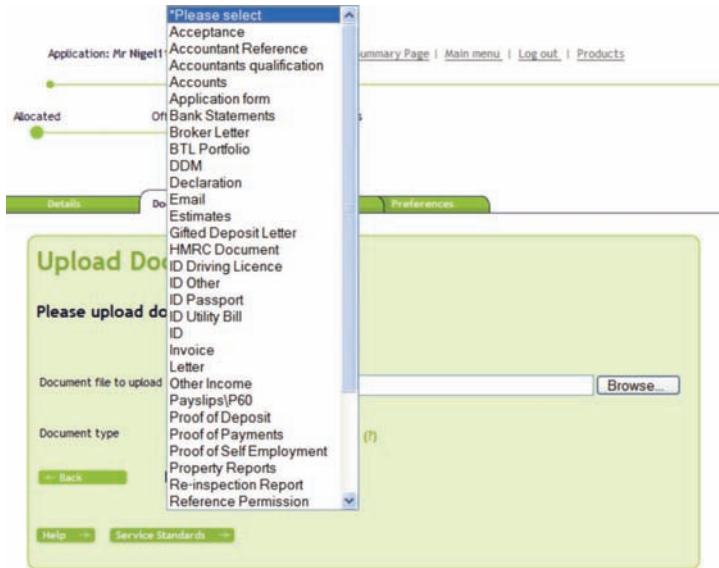
Click 'Browse' and find the relevant document from your files



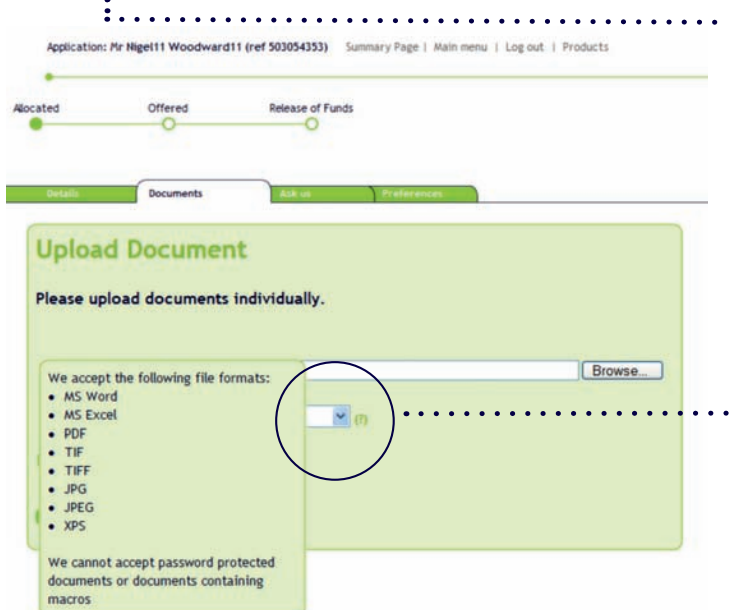
Documents must be uploaded individually, this will link your documents to outstanding tasks and ensure that your information is processed as quickly as possible.

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Tell us what information you are sending to us.

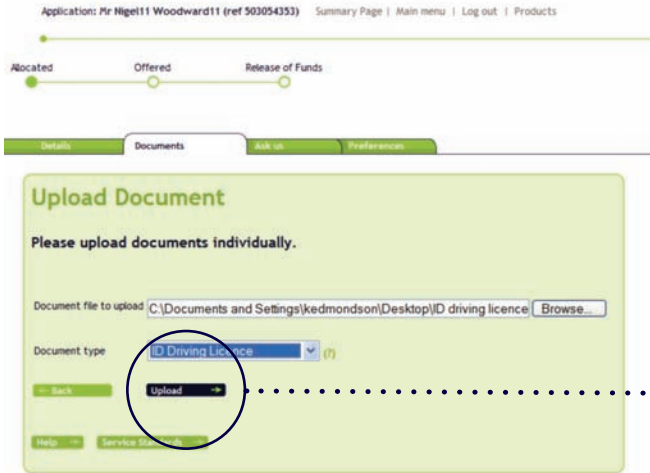


Use the (?) to check that we will accept your file format



# Clicktrack - uploading documents

Once you have uploaded and selected your document type simply click upload



You will be taken back to the Documents tab and the document you've just uploaded will be added to the bottom of the list. You can easily upload more documents by clicking the link at the top

Here are the status updates which will show against your documents in clicktrack:

**Uploading** – status will be displayed following the upload and until the document is available to be viewed (i.e. after successful virus check and conversion to PDF). Whilst the document is of this status the view option on the grid will be hidden

**Awaiting action** – will be displayed following successful conversion and prior to the relative Post task being completed

**Processing** – status will be displayed when the Post task has been started but not yet satisfied

**Satisfied** – status will be displayed once the relative Post task has been satisfied – this will also show when a document is rejected

**Upload failed** – status will be displayed if the document has not been virus checked and converted within 1 hour

