



# Adelaide Bank DocSend

---

## User Guide

V1.62

© 2020 Bendigo and Adelaide Bank Limited

Secure

Easy

oNline

Documents

# Table of Contents

<b>INTRODUCTION TO ADELAIDE BANK DOCSEND .....</b>	<b>5</b>
Features of DocSend.....	5
The Adelaide Bank solution offers.....	5
Business solutions to suit.....	6
<b>ACCESS AND CREDENTIALS.....</b>	<b>7</b>
Web address.....	7
Internet Browser and Connectivity.....	7
DocSend performance information.....	7
Upload Time .....	7
Mortgage Brokers.....	8
Mortgage Partners.....	8
Credentials.....	9
Mortgage Partners.....	9
Mortgage Brokers.....	9
<b>SUPPORT.....</b>	<b>10</b>
<b>AN INTRODUCTION TO DOCSEND.....</b>	<b>11</b>
Logging In.....	11
If you have forgotten your password.....	11
If your password has expired.....	12
<b>UPLOAD MORTGAGE DOCUMENTATION.....</b>	<b>13</b>
Step 1 - Select Document Group.....	13
Step 2 - Select Submission Method (Mortgages document group only).....	14
Step 3 – Enter Upload Details.....	16
Broker Online Submission.....	16
OLAS Submission.....	16
Top-ups, Product Conversions and Commercial Lending.....	16
Step 4 – Add Files to Upload.....	18
Accepted File Types.....	19
File Size Limit .....	19
Upload Size Limit.....	19
Page Size Limit.....	19
Special Uploads.....	19
Delete Files .....	20
Cancel Upload .....	20

Step 5 – Submit.....	21
Upload Receipt.....	22
<b>VIEW TRANSACTION HISTORY OR STATUS.....</b>	<b>23</b>
<b>SEARCHING THE TRANSACTION HISTORY .....</b>	<b>25</b>
<b>To search for a transaction: .....</b>	<b>25</b>
Status Definitions .....	25
<b>Successful Submission.....</b>	<b>26</b>
<b>Unsuccessful Submission.....</b>	<b>26</b>
Review Unsuccessful Upload.....	26
<b>EXPORT TRANSACTION HISTORY DATA .....</b>	<b>28</b>
<b>AUTOMATED UPLOAD HEADER .....</b>	<b>29</b>
<b>ELECTRONIC LODGEMENT .....</b>	<b>30</b>
<b>BARCODES.....</b>	<b>31</b>
<b>HELP .....</b>	<b>32</b>
<b>LOGGING OUT .....</b>	<b>33</b>
<b>FREQUENTLY ASKED QUESTIONS .....</b>	<b>34</b>
What if I have forgotten my password? .....	34
Why can't I see a certain Document Group? .....	34
I have entered my details - why can't I proceed? .....	34
What is a Broker/Div Code? .....	34
What is the Lender Application Reference and where can I locate it?.....	35
What is a WIN and where can I locate it? .....	35
What is an STP and where can I locate it? .....	35
Which errors can I resolve? .....	35
Which errors require Adelaide Bank resolution? .....	35
How do I resolve Invalid File Type errors? .....	35
How do I resolve Invalid File Size errors?.....	36
Why can't I select multiple files to Add? .....	36

**How do I interpret the Document Statuses?..... 36**

**How do I resolve issues with virus infected files? ..... 36**

**Why are some features not present, or are displayed incorrectly? ..... 36**

**Can I use DocSend on a mobile device? ..... 37**

**I have received an email notifying me a failed upload..... 37**

**Why is the Submit button not working? ..... 38**

**How do I find out the status of an upload?..... 38**

# Introduction to Adelaide Bank DocSend

---

Adelaide Bank DocSend is a secure, simple and fast document upload solution for submitting documentation to the Bank.

DocSend is a web interface that allows users to upload supporting documents for loan applications.

In a few quick steps, documents can be uploaded and transferred to the appropriate area of the Bank for processing.

Once uploaded, documents are virus scanned, converted to a format suitable for the Bank's processing systems and then routed to the correct destination.

## Features of DocSend

DocSend provides the following features:

- Large document capacity (800+ pages) or 100MB per document
- Automatic merge capability, eliminating the need to merge multiple documents into one file for upload
- Optional e-mail notification of successful transmissions
- Real-time document upload tracking
- Transaction history providing status of previous uploads
- Routing of documents to applications in progress
- Conversion of Serviceability Calculator means no need to print or scan
- Scalable to handle large numbers of concurrent users

## The Adelaide Bank solution offers

- Security of sensitive information
- Fast uploading of documents for either manual or electronic loan submissions
- A flexible solution for new applications and amendments
- A simple Business to Business solution that supports our partners' processes and technology solutions
- An ability to upload large documents and multiple documents in one transaction

## Business solutions to suit

**Web interface Upload** - a secure web interface accessed via browser that allows the Bank's partners (Mortgage Managers and Mortgage Brokers) to upload supporting documents and have them directly transferred to the appropriate area of the Bank for processing.

**Automated Receive Port** - is a secure method of automating the upload and submission of documents to DocSend. The ARP is a RESTful web service that allows any third-party application / platform to integrate with DocSend. Automating the submission of documents via this service can help support efficiency for your business by:

- Enabling a business to business solution that allows you to implement an end to end process within your application without the need to log into a separate web site for document upload.
- Providing a way to upload after hours so not to impact your businesses internet data quota and speeds; many users uploading documents at once can bottleneck outgoing communications. Automating the upload process can help monitor and control the amount being uploaded so that other activities are not impacted.
- Providing a way to minimise wait time for users; depending on location, infrastructure in your area, and your internet service provider, upload speeds can vary greatly. In the case of large files this can mean that you are required to keep the browser open while uploading. If your upload speeds are limited, having a local networked server do the uploading via the ARP may be an appropriate alternative to eliminate this wait time.

In order to leverage the ARP service, the technical skills of a software development team are required. If you would like to know more about the ARP and how to leverage it for your business, please contact your Business Development Manager for more information.

**Download** – a secure web interface access via browser that allows Margin Lending users the ability to download reports including Commission Reports, SWIFT Transfer confirmations and Deferred Responses such as Draw Downs and Holdings.

# Access and Credentials

---

## Web address

The Adelaide Bank DocSend web address is <https://docsend.adelaidebank.com.au>

## Internet Browser and Connectivity

Adelaide Bank DocSend has been designed and tested to accommodate a variety of browsers, however for optimal performance it is recommended that the latest version of the following browsers be used:

- Microsoft Internet Explorer v10 (or higher) / Edge v14 (or higher)
- Google Chrome v63 (or higher)
- Mozilla Firefox v58 (or higher)
- Safari v8 (or higher)

For large file uploads, it is recommended that the user has access to a high-speed broadband internet connection.

## DocSend performance information

Given Australia's service for upload rates, we anticipate that a 100MB file will take 3 - 4 minutes to upload. We also acknowledge that the speed for businesses may be better than that for households. However, in some organisations, download / upload speeds from an individual's computer are capped in order to reduce bandwidth consumption across large offices. Depending on how internet connectivity is implemented, users may experience internet akin to the 3.9Mbps link that they are familiar with at home.

### Upload Time

Upload time is the time it takes from either:

- the Submit button is selected, or
- when a third-party application sends the submit request

until the time an email notification is sent to indicate delivery has been successful.

The estimated expected upload time during peak usage periods are:

- 1 to 100 pages approximately up to 6 minutes
- 100 to 500 pages approximately up to 10 minutes
- 500 to 800 pages approximately up to 15 minutes
- Uploads exceeding 800 pages can still be submitted however upload time may be slower.

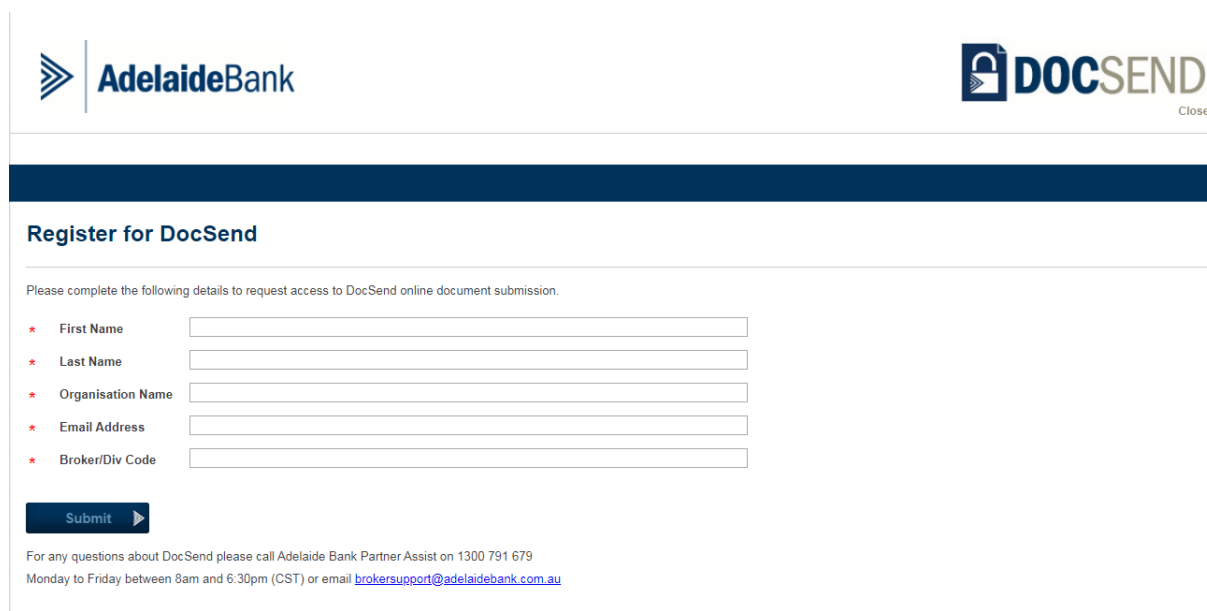
**Note:** individual files greater than 100MB will need to be split into smaller files before being submitted.

## How do I get access to DocSend?

Requests for access can be submitted directly from the DocSend home page.

### Mortgage Brokers

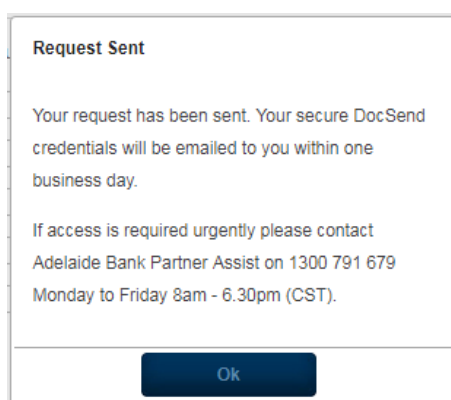
To request access, simply click on the **Register** link on the home page and complete the online form:



The screenshot shows the DocSend registration interface. At the top left is the Adelaide Bank logo, and at the top right is the DocSend logo with a 'Close' link. Below the logos is a dark blue header bar. The main content area is titled 'Register for DocSend' and contains the following text: 'Please complete the following details to request access to DocSend online document submission.' Below this text are five input fields, each with a red asterisk indicating it is mandatory: 'First Name', 'Last Name', 'Organisation Name', 'Email Address', and 'Broker/Div Code'. A blue 'Submit' button with a right-pointing arrow is located below the fields. At the bottom of the form, there is contact information: 'For any questions about DocSend please call Adelaide Bank Partner Assist on 1300 791 679 Monday to Friday between 8am and 6:30pm (CST) or email [brokersupport@adelaidebank.com.au](mailto:brokersupport@adelaidebank.com.au)'.

Once all mandatory fields have been completed, click **Submit**.

A pop up will confirm that your request for access has been sent to Adelaide Bank Partner Assist.



The screenshot shows a confirmation pop-up window titled 'Request Sent'. The text inside reads: 'Your request has been sent. Your secure DocSend credentials will be emailed to you within one business day.' Below this, it says: 'If access is required urgently please contact Adelaide Bank Partner Assist on 1300 791 679 Monday to Friday 8am - 6.30pm (CST).' At the bottom of the pop-up is a blue 'Ok' button.

Your request will be processed and your credentials issued to the nominated e-mail address.

### Mortgage Partners

Requests for access can be directed to your Business Relationship Manager.



# Credentials

## Mortgage Partners

A unique set of credentials are issued for each organisation and can be shared with users from the same organisation. Your password will not expire, however it can be reset by sending a request to your Business Relationship Manager, if required. Refer to the [Support](#) section for more information.

## Mortgage Brokers

A unique set of credentials will be issued to you. Your password is a secure, unique, random 8-digit configuration that will expire every 180 days. DocSend will remind you when it is time to change your password, however it can be reset by sending a request to Adelaide Bank Partner Assist, if required. Refer to the [Support](#) section for more information

**From:** itmadmin@bendigoadelaide.com.au  
**Sent:** Tuesday, 8 October 2014 10:12 AM  
**To:** John Broker  
**Subject:** Account new password information

**Tivoli Identity Manager**



IBM Tivoli Identity Manager Notification

The following is your new DocSend password. This is a one-time password. After logging in you will be required to change the password to one of your choosing.

Request Reference:	1534808234954346936
User Name:	041986
New Password:	Z{L(EP8z
Issued:	Oct 08, 2014 10:42:18 EST

IBM Copyright 2007, 2009

# Support

---

If you experience any technical issues, please contact:

**Adelaide Bank IT Help Desk**      **1800 689 335**

Monday to Friday between 7am-6pm (CST)

For after-hours support or non-urgent issues please email: [helpdesk@adelaidebank.com.au](mailto:helpdesk@adelaidebank.com.au)

For access support or any other queries about DocSend please contact:

**Adelaide Bank Partner Assist**      **1300 791 679**

Monday to Friday between 8am and 6.30pm (CST)

During after-hours or non-urgent issues please email: [brokersupport@adelaidebank.com.au](mailto:brokersupport@adelaidebank.com.au)

# An Introduction to DocSend

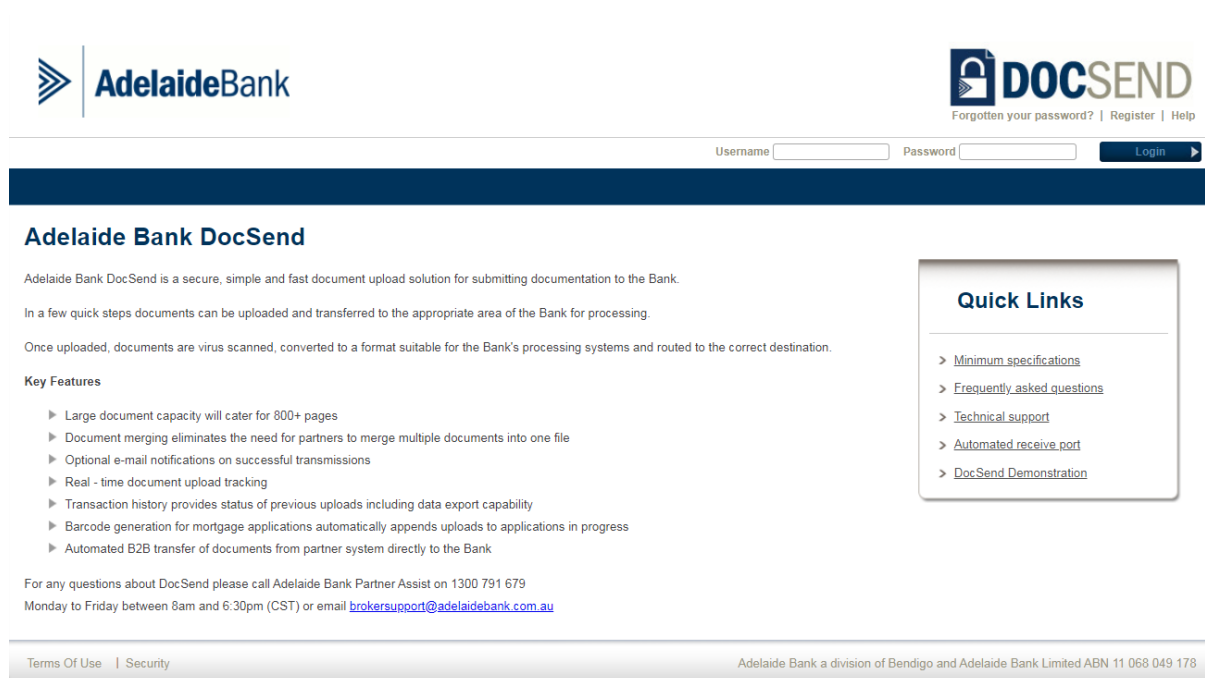
## Logging In

Before you can submit documents, you need to first log in. To log into DocSend you will require:

- Your Adelaide Bank Broker / Div Code (this will be your DocSend username) and
- The password provided by Partner Assist.

To log in, simply enter your secure credentials on the DocSend home page.

After successful authentication, the home page will automatically refresh and display the available options in the task bar, and you will also see your username in the top right-hand corner of the screen.



**Adelaide Bank**

**DOCSEND**  
Forgotten your password? | Register | Help

Username  Password

### Adelaide Bank DocSend

Adelaide Bank DocSend is a secure, simple and fast document upload solution for submitting documentation to the Bank.

In a few quick steps documents can be uploaded and transferred to the appropriate area of the Bank for processing.

Once uploaded, documents are virus scanned, converted to a format suitable for the Bank's processing systems and routed to the correct destination.

**Key Features**

- ▶ Large document capacity will cater for 800+ pages
- ▶ Document merging eliminates the need for partners to merge multiple documents into one file
- ▶ Optional e-mail notifications on successful transmissions
- ▶ Real - time document upload tracking
- ▶ Transaction history provides status of previous uploads including data export capability
- ▶ Barcode generation for mortgage applications automatically appends uploads to applications in progress
- ▶ Automated B2B transfer of documents from partner system directly to the Bank

For any questions about DocSend please call Adelaide Bank Partner Assist on 1300 791 679  
Monday to Friday between 8am and 6:30pm (CST) or email [brokersupport@adelaidebank.com.au](mailto:brokersupport@adelaidebank.com.au)

**Quick Links**

- > [Minimum specifications](#)
- > [Frequently asked questions](#)
- > [Technical support](#)
- > [Automated receive port](#)
- > [DocSend Demonstration](#)

Terms Of Use | Security



Adelaide Bank a division of Bendigo and Adelaide Bank Limited ABN 11 068 049 178

## If you have forgotten your password

If you have forgotten your password, click on the *Forgotten Your Password?* link located in the top right-hand corner of the page. Simply complete your details and submit your request to Adelaide Bank Partner Assist. Refer to the [Support](#) section for more information.

## If your password has expired

If your password has expired, DocSend will prompt you to set a new password.



---

### Your password has expired

Please choose a new password. Your new password must:

1. Be different from your "Current Password";
2. Contain at least one number;
3. Contain at least one letter; and
4. Be at least eight characters long.

Please remember that your password is case sensitive. This means that the password "Password01" is not the same as "password01" or "PASSWORD01".

You should never disclose your password to anyone.

User Name	test584
Current Password	<input type="password"/>
New Password	<input type="password"/>
Confirm New Password	<input type="password"/>

# Upload Mortgage Documentation

Once you have successfully logged in, you can start to upload documents. The following steps explain how to upload documents.

## Step 1 - Select Document Group

If you are a member of multiple document groups (destinations within the Bank), you will be asked to select a document group. The following options may be available depending on the access granted to you:

- Mortgages
- Portfolio Funding
- Margin Lending

**Note:** If you are a member of only one document group, your group will be automatically selected, and this step is not required.

The screenshot shows the AdelaideBank DocSEND interface. The page title is "Choose your Document Group". The instruction is "Please choose the document group you want to upload documents to." The "Document Group:" field has a dropdown menu with "Please Select" and a plus sign. The dropdown menu is open, showing the following options: "Please Select", "Margin Lending", "Mortgages", and "Portfolio Funding". A "Continue" button is visible next to the dropdown menu.

- Select the required document group from the drop-down list and click **Continue**.

## Step 2 - Select Submission Method (Mortgages document group only)

If you have selected the 'Mortgages' document group (or the only document group you have access to is the 'Mortgages' group) then the next step is to select the submission method. These details are used to route the documents to the correct mortgage processing system in the Bank.

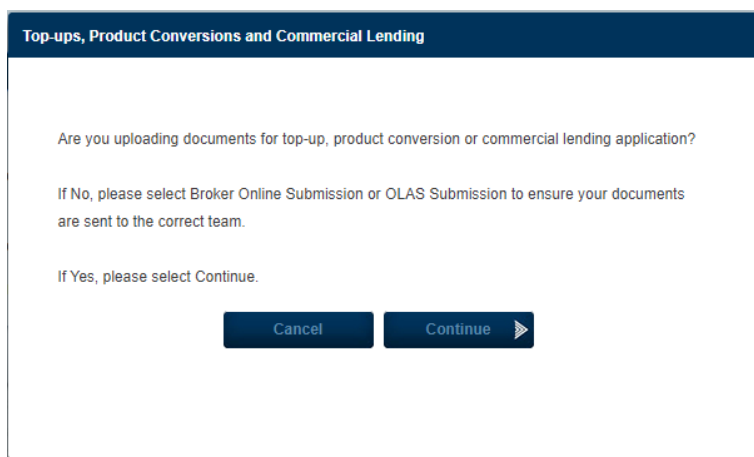
- Select the required submission method and then click **Next** to proceed.

**Note:** that if you selected a document group other than 'Mortgages' then this step is not required.

The following table explains when each scenario is applicable:

Submission Method	Use when:
Broker Online Submission	<ul style="list-style-type: none"> <li>• You have submitted the residential mortgage loan application online, and</li> <li>• The Bank has provided you with a 9-digit lender application reference, and</li> </ul>
OLAS Submission	<ul style="list-style-type: none"> <li>• You have submitted the residential loan application using OLAS, and</li> <li>• OLAS has provided you a 6 digit STP number, or</li> <li>• The Bank has provided you with an 8-digit WIN number</li> </ul>
Top-ups, Product Conversions and Commercial Lending	<ul style="list-style-type: none"> <li>• The documents relate to a Top-up, Product Conversion or a Commercial lending application</li> <li>• The documents are not related to a Broker Online Submission or OLAS Submission</li> </ul>

If you select option 3 'Top-ups, Product Conversions and Commercial Lending', then the following confirmation will appear:



**Top-ups, Product Conversions and Commercial Lending**

Are you uploading documents for top-up, product conversion or commercial lending application?

If No, please select Broker Online Submission or OLAS Submission to ensure your documents are sent to the correct team.

If Yes, please select Continue.

- If the documents you are about to upload relate to a Top-up, Product Conversion or a Commercial lending application then select Continue to continue to the next step
- If the documents you are about to upload are intended for a Broker Online Submission or OLAS Submission then please click Cancel, and then select either option 1 or 2 as appropriate

**Note:** This step has been added to help ensure documents are routed to the correct Bank system and to avoid delays in processing your request.

## Step 3 – Enter Upload Details

To ensure the documents will be routed to the correct application, we need to capture some details about your application. The details required vary, depending on the document group and submission method selected.

### Broker Online Submission

After selecting 'Broker Online Submission' the following screen appears:

The screenshot shows the 'Enter Details' step of the 'Upload Mortgage Documentation' process. The breadcrumb trail is 'Home > Upload > Transaction History > Download > Support > Reporting'. The page title is 'Upload Mortgage Documentation'. The progress bar shows 'Enter Details' as the active step, followed by 'Upload Documents' and 'Upload Receipt'. The form contains the following fields:

- Application Name: PRIMARY APPLICANT SURNAME
- Broker/Div Code:
- Your Surname:
- Your Email:
- Your First Name:
- Contact Number:
- Send me email confirmation of successful uploads:
- Lender Application Reference:

Buttons: Cancel, Next

### OLAS Submission

After selecting 'OLAS Submission' the following screen appears:

The screenshot shows the 'Enter Details' step of the 'Upload Mortgage Documentation' process. The breadcrumb trail is 'Home > Upload > Transaction History > Download > Support > Reporting'. The page title is 'Upload Mortgage Documentation'. The progress bar shows 'Enter Details' as the active step, followed by 'Upload Documents' and 'Upload Receipt'. The form contains the following fields:

- Application Name: PRIMARY APPLICANT SURNAME
- Broker/Div Code:
- Your Surname:
- Your Email:
- Your First Name:
- Contact Number:
- Send me email confirmation of successful uploads:
- New application:  Additional documents for an existing application:

Buttons: Cancel, Next

### Top-ups, Product Conversions and Commercial Lending

After selecting 'Top-ups, Product Conversions and Commercial Lending' the following screen appears:

The screenshot shows the 'Enter Details' step of the 'Upload Mortgage Documentation' process. The breadcrumb trail is 'Home > Upload > Transaction History > Download > Support > Reporting'. The page title is 'Upload Mortgage Documentation'. The progress bar shows 'Enter Details' as the active step, followed by 'Upload Documents' and 'Upload Receipt'. The form contains the following fields:

- Application Name: PRIMARY APPLICANT SURNAME
- Broker/Div Code:
- Your Surname:
- Your Email:
- Your First Name:
- Contact Number:
- Send me email confirmation of successful uploads:
- New application:  Additional documents for an existing application:

Buttons: Cancel, Next

Complete all mandatory fields displayed on this screen and then click **Next**



The following table explains the purpose of each field:

Field	Description	Applicable to:		
		Broker Online Submission	OLAS Submission	Top-ups, Product Conversions and Commercial Lending
Application Name *	The primary applicant's name	✓	✓	✓
Broker/Div Code *	Your Broker/Div code. Must for 5 or 6 digits long	✓	✓	✓
Your Surname *	Your surname	✓	✓	✓
Your First Name *	Your first name	✓	✓	✓
Your Email *	Your current email address. Must be a valid email address	✓	✓	✓
Contact Number *	Your current phone number we can contact you on during business hours	✓	✓	✓
Send me email confirmation of successful uploads	Check this box if you want to receive an email confirmation once the upload has been complete	✓	✓	✓
Lender Application Reference *	The unique 9-digit lender Application Reference assigned to a mortgage loan application that was submitted online (e.g. ApplyOnline). The uploaded documents will be associated with this application	✓	✗	✗
New application	Check this box if the application is new and the application WIN is not known <b>Note:</b> always use this option for submitting documents for an Increase	✗	✓	✓
Loan Amount	Enter the loan amount of the new application when the WIN is not known	✗	✓	✓
Guarantor	Check this box if the new application includes a guarantor. Not required if the WIN is known	✗	✓	✓
Additional documents for an existing application	Check this box if the application WIN is known. You will need to enter the WIN. <b>Note:</b> do not use this option for submitting documents for an Increase. Please use the New application option	✗	✓	✓
Application Number: WIN *	The unique 8-digit application WIN number assigned to the application if known. The uploaded documents will be associated with this application	✗	✓	✓
STP *	OLAS Unique electronic lodgement ID number	✗	✓	✗
Approved	Only required for OLAS applications submitted with an	✗	✓	✗

	STP electronic lodgement ID			
Referred	Only required for OLAS applications submitted with an STP electronic lodgement ID	✘	✔	✘

## Step 4 – Add Files to Upload

Multiple documents can be uploaded in a single transaction. There is no need for you to convert multiple related documents into one file.

To add document files to the upload:

- Click on **Add Files**
- Browse your directory to locate the relevant files for your upload
- Select the files to be added. To select multiple files, hold down <Ctrl> on your keyboard and click on each file you want to upload
- The files to be uploaded will be listed on the screen
- Repeat the above steps until all the files you want to upload to the application have been added

**Note:** Please only add documents relevant to the application details provided in Step 3.

AdelaideBank

DOCSEND  
Logout | Help

Home Upload Transaction History

Welcome John Broker

### Upload Mortgage Documentation

Enter Details > Upload Documents > Upload Receipt

Please note: There is an upload limit of 100MB per document and a total limit of 300MB per upload.

Add Files...

<input type="checkbox"/> Delete	Document Name	Size
<input type="checkbox"/>	LMI.pdf	923.74 KB
<input type="checkbox"/>	Rates Notice.pdf	923.74 KB
<input type="checkbox"/>	SmartSaver Statements.pdf	923.74 KB
<input type="checkbox"/>	Valuation.pdf	199.36 KB

4 files added 2.90 MB total

Delete Back Cancel Submit

Terms Of Use | Security

Adelaide Bank a division of Bendigo and Adelaide Bank Limited ABN 11 068 049 178

## Accepted File Types

For each Document Group, the permitted file types are:

Document Group	Submission Method	Acceptable File Types
Mortgages	Broker Submission	.pdf, .doc, .docx, .jpg, .jpeg, .tif, .tiff, .txt, .xls, .xlsx, .csv
Mortgages	OLAS Submission	.pdf, .doc, .docx, .jpg, .jpeg, .tif, .tiff, .txt
Mortgages	Top-ups, Product Conversions and Commercial Lending	.pdf, .doc, .docx, .jpg, .jpeg, .tif, .tiff, .txt
Margin Lending	-	.pdf, .txt
Portfolio Funding	-	.xls, .xlsx, .csv

## File Size Limit

Individual document sizes must not exceed 100MB.

- This limit can accommodate documents in excess of 200 pages.
- If you need to upload documents that exceed 100MB, it is recommended that large documents be split into multiple documents, and then add these smaller documents to the upload.

## Upload Size Limit

DocSend can accommodate a total limit of 300MB and up to 150 individual files per upload.

## Page Size Limit

Document page size must not exceed A4 in order to convert successfully to the Banks document imaging repository.

## Special Uploads

DocSend gives you the ability to upload your edited Adelaide Bank Serviceability Calculator. Just save the completed calculator for your application and upload the file with the rest of your supporting documentation.

## Delete Files

If a file has been added, and it is no longer required to be uploaded, it can be removed:

- Select the check box next to each file you would like to remove
- Click **Delete**

The screenshot shows the 'Upload Mortgage Documentation' interface. The 'Upload Documents' step is active. A table lists the following files:

<input type="checkbox"/> Delete	Document Name	Size
<input checked="" type="checkbox"/>	b316fbc7-7cb1-4406-b945-43ffa987a802.jpg	92.66 KB
<input type="checkbox"/>	Cynefin framework.pdf	472.02 KB
<input type="checkbox"/>	cynefin.jpg	215.85 KB

Below the table, it indicates '3 files added 780.54 KB total'. At the bottom, there are buttons for 'Delete', 'Back', 'Cancel', and 'Submit'. The 'Delete' button is highlighted with a red box.

## Cancel Upload

You can cancel your upload at any time before the **Submit** button has been clicked. Note that all documents that you have selected will be removed and you will not be able to return to this upload. You will need to re-start a new upload. A confirmation dialog will open asking you if you want to 'Cancel document upload and return to the home page?' clicking **Yes** will confirm the requested cancellation.

## Step 5 – Submit

Once all required files have been selected and are displayed in the file list on the Upload Documentation screen, then click **Submit**.

**Note:** At least one valid file must be selected before submission can occur.

AdelaideBank

DOCSEND  
Logout | Help

Home Upload Transaction History Download Support Reporting Welcome test admin

### Upload Mortgage Documentation

Enter Details > Upload Documents > Upload Receipt

Please note: There is an upload limit of 100MB per document and a total limit of 300MB per upload.

Add Files... >

Delete	Document Name	Size
<input type="checkbox"/>	b316fbc7-7cb1-4406-b945-43ffa987a802.jpg	92.66 KB
<input type="checkbox"/>	Cynefin framework.pdf	472.02 KB
<input type="checkbox"/>	cynefin.jpg	215.85 KB

3 files added 780.54 KB total

Delete Back Cancel Submit >

Terms Of Use | Security Adelaide Bank a division of Bendigo and Adelaide Bank Limited ABN 11 068 049 178

After submission:

- DocSend will virus scan your files and then confirm that your upload has been completed.
- Once your upload is complete there can be no further modifications to the selected document(s).
- If you want to upload more documents for this application, then simply complete an additional upload and enter the same application details.

## Upload Receipt

Once you have submitted your documents, you will receive a receipt for your upload. The receipt lists all documents submitted and includes a unique Upload ID which allows you to track your upload throughout the process.

You also have the option to **Print** a copy of your receipt for your file.

AdelaideBank | DOCSEND  
Logout | Help

Home Upload Transaction History Download Support Reporting | Welcome John Broker

### Document Upload Receipt

Enter Details | Upload Documents | Upload Receipt

Thank you for your submission. Your documents are being processed.

Upload Id: 3020  
Application Name: SMITH

Print

Document Id	Document Name	Size
5152	LMI.pdf	923.74 KB
5153	Rates Notice.pdf	923.74 KB
5154	SmartSaver Statements.pdf	923.74 KB
5155	Valuation.pdf	199.36 KB

Home | View Status | New Upload

Terms Of Use | Security | Adelaide Bank a division of Bendigo and Adelaide Bank Limited ABN 11 068 049 178

From here your options are:

<b>View Status</b>	Will take you to the Transaction History screen and to this specific upload record where you can continue to track the status of your upload.
<b>Home</b>	Return to the Home page
<b>New Upload</b>	Commence another upload

## View Transaction History or Status

The Transaction History displays the details and status of all the documents you have uploaded. To view the Transaction History or the Status of an upload:

- Either click on **View Status** on the Document Upload Receipt screen, or
- Select the **Transaction History** option from the menu tab.
- The Transaction History screen will be displayed:

Upload Id	Upload Date	Application Name	Broker/Div Code	STP	WIN / Lender Ref	User	Uploaded By	Status
4360	20/06/19 5:18 PM	AUTOMATION	111111		12345678	test admin	VENKATA DANDU	Documents received
4358	20/06/19 11:28 AM	AUTOMATIONNAME	123456		12345678	test admin	AUTOFIRST AUTO...	Documents received
4355	18/06/19 12:32 PM	TEST	132829		031037958	test admin	KELLY SHAW	Documents received
4354	18/06/19 12:29 PM	TEST	132829		031037958	test admin	KELLY SHAW	Documents received
4349	13/06/19 8:47 AM	FLI PTY LTD AND PHIL ...	141306	19003249		test admin	KERYN FLEMMER	Documents received

For each upload, the following information is captured:

Field	Description
<b>Upload Id:</b>	Unique reference number for the upload session
<b>Upload Date:</b>	Date and time status occurred
<b>Application Name:</b>	Application name assigned to upload (Surname of the primary applicant)
<b>Broker/Div Code:</b>	Unique Adelaide Bank accreditation number
<b>STP:</b>	OLAS Unique electronic lodgement ID number
<b>WIN / Lender Ref:</b>	The Bank's application reference allocated to an existing application <ul style="list-style-type: none"> <li>• Work Identification Number (WIN) applies to OLAS application only</li> <li>• Lender Ref applies to LendFast applications only</li> </ul>
<b>User:</b>	Username of the user who submitted the upload
<b>Uploaded By:</b>	Full name of the user who submitted the upload

<b>Status:</b>	Current status of your upload
----------------	-------------------------------

For each document in an upload, the following information is captured:

<b>Document Id:</b>	Unique reference number for each document in the upload
<b>Document Size:</b>	Size of uploaded document
<b>Document Name:</b>	Name of uploaded document
<b>Document Status:</b>	Current status of uploaded document



## Searching the Transaction History

---

You have the option to search for a specific upload using the search options located at the top of the **Transaction History** screen. You can also:

- Sort your upload history by clicking on any of the table headings to locate your upload details, and
- Select and expand each upload record to view the individual documents and their current upload status.


The transaction log captures information for documents uploaded using either the web interface or using the Auto Receive Port.

### To search for a transaction:

- Enter the search criteria at the top of the screen.
- Click **Search**.
- The search results will be displayed on the bottom of the screen.

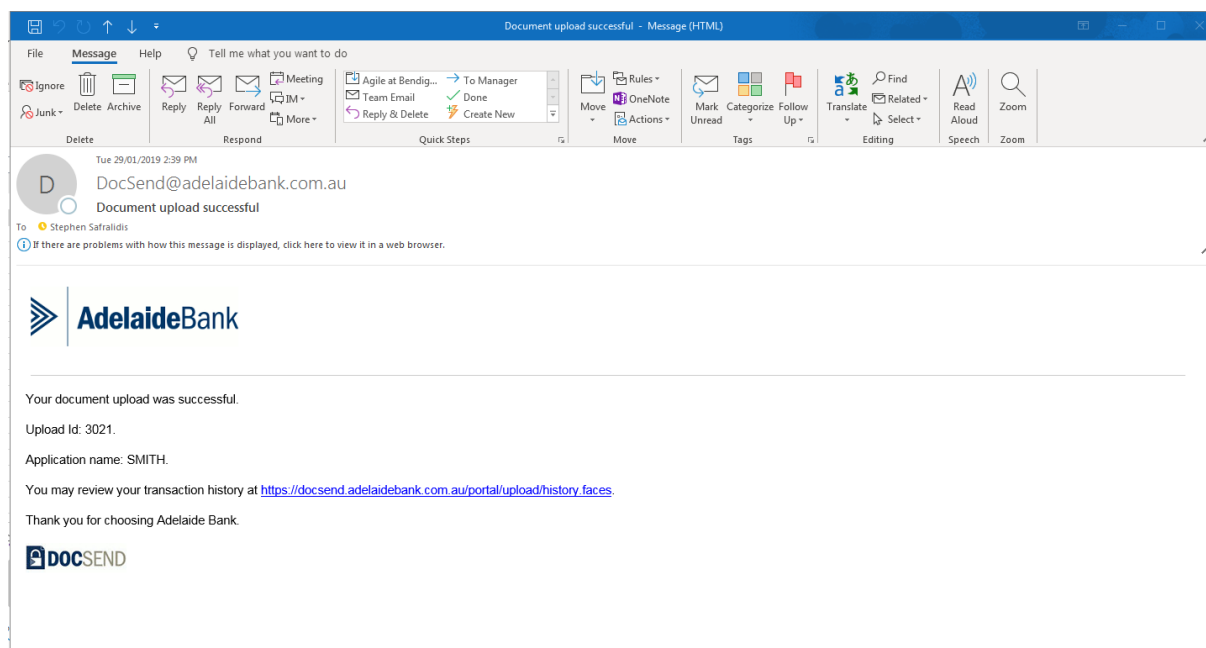
### Status Definitions

The following tables summarises the Upload and Document Status Definitions

In progress:	Once an upload is initiated, it is automatically updated to this status.
Documents received:	The upload and all attached documents have successfully been delivered to Adelaide Bank.
Failed:	<p>This status is triggered when one or more of the documents uploaded have encountered a failure.</p> <ul style="list-style-type: none"> <li>• Resolution of uploads in this state will be attempted by Adelaide Bank</li> <li>• If the document cannot be resolved by the Bank, then the upload status will be moved to Failed.</li> </ul> <p> The unsuccessful upload will be highlighted for you in your Transaction History by an alert icon</p>



## Successful Submission

If the upload was successful, then the status will display 'Success'. If you selected to receive an email confirmation, then you will receive an email once the submission has been successful:



## Unsuccessful Submission


If your upload was unsuccessful:

- The unsuccessful upload will be highlighted on the Transaction History screen by an alert icon: 
- You will also see a blue **Review Upload** icon adjacent to your upload Id on the Transaction History screen: 
- You will also be contacted by Partner Assist, and
- You will also receive an email notification.

This will give you the opportunity to review the upload and either remove the unsuccessful upload or re-submit it.

### Review Unsuccessful Upload

To review an unsuccessful upload:

- Click on the blue **Review Upload** icon: 
- You will be directed to the **Upload Documents** page
- Files that DocSend was unable to repair will be automatically removed from the upload for you at this point.

- If you would like to proceed and submit the upload with just the successful files and without the failed file, then click **Submit**.
- If you would like to replace the failed file, add a replacement file to replace the one the file that that was rejected, then click **Submit**.
  - The Upload Id will remain the same
  - The replacement document set will be displayed in the Transaction History screen after your upload has been resubmitted.

**Note:** Files that have been successfully uploaded do not need to be resubmitted.

## Export Transaction History Data

---

You can export the transaction history data for analysis and reporting purposes. The data can be exported using the following file formats:



Microsoft Excel



Adobe PDF



CSV

To export transaction history data:

- Enter the search criteria at the top of the screen
- Click **Search**
- The search results will be displayed on the bottom of the screen.
- The results displayed on the screen will be exported. Modify the search criteria if the data displayed is not what is required to be exported
- Click on the required file format icon
- The transaction history data will be exported in the select file format

## Automated Upload Header

---

Each time you upload documents to the Bank DocSend will automatically generate an upload header. The electronic header captures your details, application details and is date and time stamped. The upload header is automatically appended to your documents and can be viewed by bank staff on receipt of documents.

**Note:** You should continue to provide your application summary as it provides key contact details and processing information.

## Electronic Lodgement

---

Where your application has been submitted electronically to the Bank, we need to capture the unique electronic lodgement reference number STP<sup>1</sup> in DocSend. This ensures that the documents you upload can be matched to the electronic application data that is automatically populated to our processing systems.



---

STP Number: DX11659

User: John Broker  
Date: Fri, 22 Aug 2014  
Time: 3:24PM

Application Name: SMITH  
Broker/Div Code: 041986  
Submitted by: John Broker  
E-mail: [jbroker@brokingaustralia.com.au](mailto:jbroker@brokingaustralia.com.au)

---

<sup>1</sup> The STP (Online Loan Lodgement) reference is issued for loan applications submitted to the Bank via its Online Loan Approval System (OLAS).

## Barcodes

---

If your upload is for an existing application, you will be required to enter the WIN<sup>2</sup>. By capturing the WIN, DocSend can generate a barcode that will be appended to the documents uploaded.

This saves time because the documents bypass our indexing process, are automatically appended to the application, and the file is activated on the work queue for processing.



---

User: John Broker  
Date: Fri, 22 Aug 2014  
Time: 3:24PM



Application Name: SMITH  
Broker/Div Code: 041986  
Submitted by: John Broker  
E-mail: [jbroker@brokingaustralia.com.au](mailto:jbroker@brokingaustralia.com.au)

---

<sup>2</sup> The WIN (Work Identification Number) can be located beneath the barcode on correspondence sent to you about your application i.e. Request for Additional Information or Conditional Approval advice.

# Help

Clicking on the **Help** link located under the DocSend logo will open and display this User Guide, along with some **Frequently Asked Questions**.

**AdelaideBank** **DOCSEND** Close

**Help** Download User Guide

**User Guide**

<p><b>Introduction</b></p> <ul style="list-style-type: none"> <li>Adelaide Bank DocSend</li> <li>Features of DocSend</li> <li>Business solutions to suit</li> <li>The Adelaide Bank solution offers</li> </ul>	<p><b>Access and Credentials</b></p> <ul style="list-style-type: none"> <li>Web Address</li> <li>Internet Browser and Connectivity</li> <li>How do I get access to DocSend?</li> <li>Credentials</li> <li>Support</li> </ul>	<p><b>An Introduction To DocSend</b></p> <ul style="list-style-type: none"> <li>Logging In</li> <li>Upload Mortgage Documentation</li> <li>Document Management</li> <li>Automated Upload Header</li> <li>Viewing Transaction History</li> <li>Review Upload</li> <li>Help</li> <li>Logging Out</li> </ul>
--	--	---

**Frequently Asked Questions**

<ul style="list-style-type: none"> <li>What if I have forgotten my password?</li> <li>Why can't I see a certain Document Group?</li> <li>I have entered my details - why can't I proceed?</li> <li>What is a Broker/Div Code?</li> <li>What is a WIN and where can I locate it?</li> <li>What is an STP and where can I locate it?</li> </ul>	<ul style="list-style-type: none"> <li>Which errors can I resolve?</li> <li>Which errors require Adelaide Bank resolution?</li> <li>How do I resolve Invalid File Type errors?</li> <li>How do I resolve Invalid File Size errors?</li> <li>Why can't I select multiple files to Add?</li> <li>How do I interpret the Document Statuses?</li> </ul>	<ul style="list-style-type: none"> <li>How do I resolve issues with virus infected files?</li> <li>Why are some features not present, or are displayed incorrectly?</li> <li>Can I use DocSend on a mobile device?</li> <li>I have received an email notifying me of a failed upload</li> <li>Why is the Submit button not working?</li> <li>How do I find out the status of an upload?</li> </ul>
---	---	--

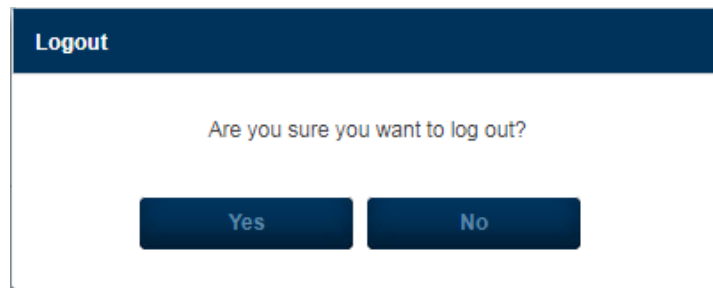


## Logging Out

---

Logging out directs you back to the DocSend **Home** page.

Note: If you log out in the middle of an upload session it will have the same effect as cancelling from the upload. All files selected but not submitted up until the point of logging out will not be transmitted and will be removed entirely.



## Frequently Asked Questions

### What if I have forgotten my password?

If you have forgotten your password, you can request for a password reset directly via DocSend. Click on the [Forgotten your password?](#) link on the Home page and complete the online form.

The screenshot shows the DocSend password reset form. At the top left is the AdelaideBank logo, and at the top right is the DocSEND logo with a 'Close' link. The form title is 'Request a password reset'. Below the title, it says 'Please complete the following details to request a password reset for your DocSend secure credentials.' There are five input fields, each with a red asterisk indicating it is mandatory: 'First Name', 'Last Name', 'Organisation Name', 'Email Address', and 'Broker/Div Code'. Below the fields is a blue 'Submit' button with a right-pointing arrow. At the bottom of the form, there is contact information: 'For any questions about DocSend please call Adelaide Bank Partner Assist on 1300 791 679 Monday to Friday between 8am and 6:30pm (CST) or email [brokersupport@adelaidebank.com.au](mailto:brokersupport@adelaidebank.com.au)'.

### Why can't I see a certain Document Group?

It is possible that authorisation to upload to the Document Group in question has not been granted; see section **Access and Credentials \ Support** of the User Guide for contact details of relevant teams to confirm access privileges or request amendment to access permissions.

### I have entered my details - why can't I proceed?

1. Check that the following fields (Your Surname, Your Email, Application Name, Broker/Div Code and WIN) have been entered. As user information fields are mandatory, you will not be allowed to proceed to Upload Documents if they have not been entered.
2. If all fields have been entered, check that the data entered does not contain any special characters and the email address is formatted correctly. DocSend will display error validation messages to help you identify any unaccepted data.
3. If following the instructions above does not resolve this issue, see section **Access and Credentials \ Support** of the User Guide and contact the relevant team for assistance.

### What is a Broker/Div Code?

Also known as the Advisor Code, Broker Code or Broker Number, the Broker/Div Code is your unique bank accreditation code against which your upload will be lodged.

## What is the Lender Application Reference and where can I locate it?

The Lender Application Reference is Adelaide Bank's unique 9-digit reference assigned to a mortgage loan application that was submitted online, and is used to track the online application from submission to settlement. The Lender Application Reference is automatically displayed on the online application after submission, and on the Bank's correspondence used during the processing of the application. Providing the Lender Application Reference is mandatory to ensure that documents are matched to the application data and your place reserved in the work queue. If you are unable to find the 9-digit Lender Application Reference, please contact Adelaide Bank Partner Assist.

## What is a WIN and where can I locate it?

The Work Identification Number (WIN) is Adelaide Bank's unique 8-digit reference for your loan application while it is being processed in our Processing Centre. The WIN is used to track the application from submission to settlement. For the upload of documentation for existing applications, you are required to enter the WIN with the application details. Provision of the WIN ensures that any subsequent documents are automatically appended to the case and your place reserved in the work queue. If the WIN is misplaced or forgotten, please contact Adelaide Bank Partner Assist.

## What is an STP and where can I locate it?

The Straight Through Processing (STP) number is Adelaide Bank's unique reference for each loan application submitted on the Online Loan Approval System (OLAS). The STP number is used to match application data loaded in OLAS with the supporting documentation when it is submitted to our Processing Centre. The STP number is automatically populated on the OLAS cover sheet.

## Which errors can I resolve?

Resolution by you is required when the Application status is 'Suspended'; this is triggered when one or more documents uploaded within an application have failed file format validation or virus scanning. See below for tips on resolving these issues.

## Which errors require Adelaide Bank resolution?

Given that files meet file validation criteria and are free from viruses, all other failures will be resolved by Adelaide Bank. Please contact Adelaide Bank Partner Assist if there are queries on the progress of issue resolution.

## How do I resolve Invalid File Type errors?

See **Document Management** section of the User Guide for accepted formats. Though most common document file types have been accommodated, it is likely that other word processing applications or scanning devices are used.

- For users of multi-functional or scanning devices, please consult the manual for your device and ensure that scans are produced in pdf, jpg or tiff formats, as these are accepted by DocSend.
- For users of non-Microsoft word processing software experiencing difficulty with saved file formats, there are various softwares (PDFlite, CutePDF - search 'print to pdf') that allow printing to pdf format, effectively allowing most files to be saved as a non-editable pdf.

Users must ensure that only files of these formats are uploaded; all other file types are not authorised for upload and will raise an invalid file type error.

## How do I resolve Invalid File Size errors?

The size limit for each individual file selected is 100Mb. Users are permitted to add multiple files per upload. The limit for the total of all files within an upload is 300Mb. For individual documents greater than this 100Mb or where the total upload size exceeds 300Mb, users are advised to either break the document down into portions no greater than 100Mb each or reduce the number of files submitted in a single upload.

## Why can't I select multiple files to Add?

Some older versions of browsers don't support multiple file uploads. If you are using an older browser, you will need to select and add each file individually. Note: All browsers no longer support folder upload.

Browsers	Single file selection	Multiple file selection
Internet Explorer v10 (or higher) / Edge v14 (or higher)	✓	✓
Internet Explorer v8, v9	✓	✗
Mozilla Firefox v58 (or higher)	✓	✓
Google Chrome v63 (or higher)	✓	✓
Safari v8 (or higher)	✓	✓

## How do I interpret the Document Statuses?

See **Transaction History \ Status Definitions** sections of the User Guide for status definitions. Contact Adelaide Bank Partner Assist if further information is required.

## How do I resolve issues with virus infected files?

- Perform a virus scan and repair on your local machine. If you have a virus scanner installed on your computer, please use the virus scanner to perform a scan on the file(s) in question. Virus scanners will generally attempt to repair the file, if so, validate that the repaired file is not corrupt by opening the document and inspecting the contents.
- When all else fails and if access to a virus scanner is not possible, print the document and fax it to Adelaide Bank on 1300 ADL FAX (1300 235 329)

## Why are some features not present, or are displayed incorrectly?

The design and testing of DocSend has accommodated a variety of browsers, however for optimal performance it is recommended that the latest version of the following browsers be used:

- Microsoft Internet Explorer v10 (or higher) / Edge v14 (or higher)
- Google Chrome v63 (or higher)

- Mozilla Firefox v58 (or higher)
- Safari v8 (or higher)

If you are already using one of the above browsers, upgrading to the latest version may resolve issues with page presentation and functionality.

DocSend has been tested against the following Operating Systems:

Operating System	Web Browser			
	Chrome v63 (or higher)	Internet Explorer v10 (or higher) / Edge 14 (or higher)	Firefox v58 (or higher)	Safari v8 (or higher)
Windows (7, 8, 8.1, 10)	✓	✓	✓	✗
Mac OS X 10.10 and later	✓	✗	✓	✓
iOS 10 and later	✓	✗	Not supported	✓
Android 4.4 and later	✓	Not supported	Not supported	✗

## Can I use DocSend on a mobile device?

Whilst DocSend has not been specifically optimised for use on mobile devices it does work on both tablet and mobile smart phone.

## I have received an email notifying me a failed upload

- Identify the file(s) within the upload with a 'Failed' status.
- You will be contacted by Adelaide Bank Partner Assist for details on why your file may have failed.
- Utilise the **Review Upload** function to either resubmit without the failed file or add a replacement version of the failed file and submit again.

## Why is the Submit button not working?

- Check that files have been added to the upload. Each application must have at least one document that is added.
- If your browser has been inactive for over 120 minutes, your session will time out and you will be logged out of DocSend and reverted to the home page. Any applications that have not been submitted prior to the timeout will need to be re-uploaded and submitted.

## How do I find out the status of an upload?

Once a submission has been made, the status of an upload can be checked in the Transaction History. See **Transaction History** section of the User Guide for details on how to access this feature and search for transactions.