Uploading from Process Screen in PermitPro

On the Dashboard, select the application you wish to work on and click the gear icon ⚙ to access the Process Screen for that application.

In the Documents section **Documents**, there will be a list of documents that have been submitted or need to be submitted.

If you see the document in the list that you wish to upload, click on the **+** sign under the Entered column:

Document Name	Entered	Received	Signed Off	

You will trigger a pop up on the screen asking if you want to Upload, Mark as Received or Complete the form online if available. Select the Upload option and click Continue:
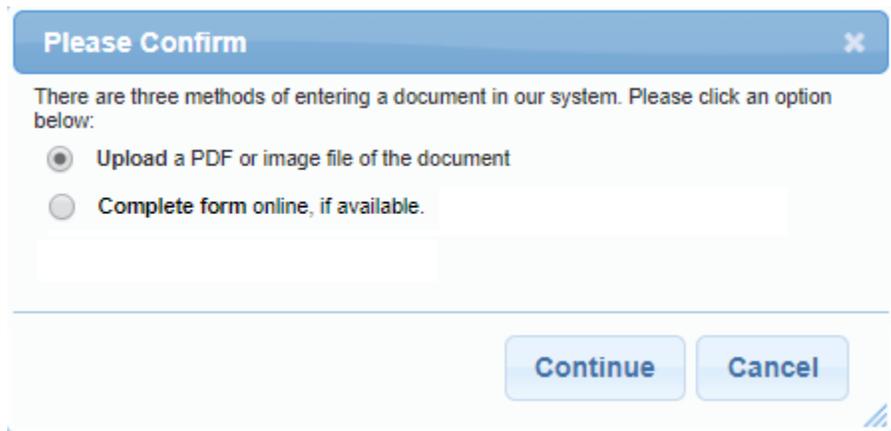
Please Confirm

There are three methods of entering a document in our system. Please click an option below:

- ● Upload a PDF or image file of the document
- ○ Complete form online, if available.

[Continue] [Cancel]

This will take you to the Upload Files box
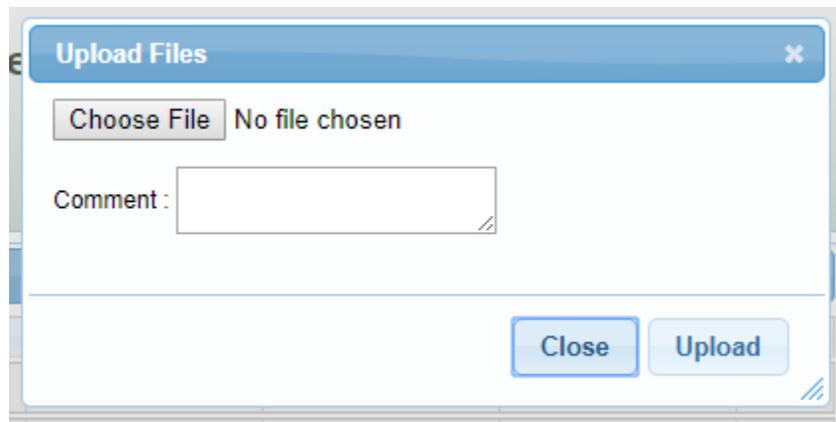
Upload Files

Choose File | No file chosen

Comment :

[Close] [Upload]

Click on Choose File and the device's directory will pop up where you can select the location of the file you wish to upload and then click on the actual file you wish to upload.

Once you have the file selected, you will return to the Upload Files box. From there you can select Upload or you can also add a comment before you upload the file:

Upload Files   ✕

Choose File | Banker Trad...t TEXT.doc

Comment : Comment about upload
here
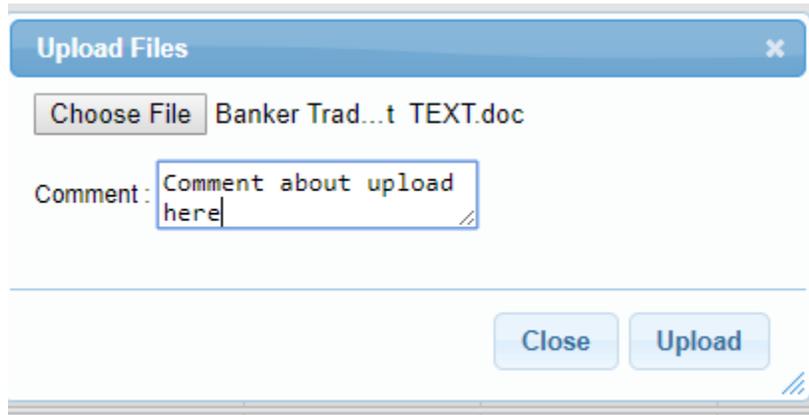
Close   Upload

The file will upload and you will receive notification of a successful upload:

Upload Files   ✕

Upload Successful

◀   ▶
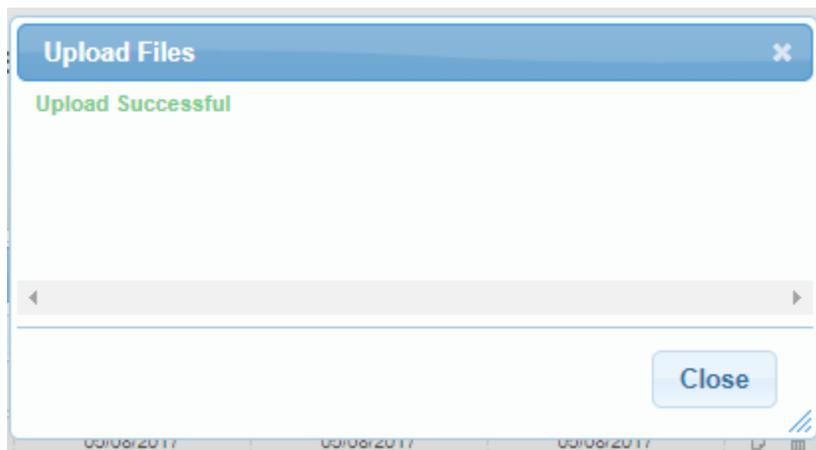
Close

Click Close to return to the Process Screen where you will see your uploaded document:

| Other | 06/15/2017 | + | + | ↓ |

If you hover over the down arrow icon ↓ you will see any comments you added before uploading:

Comment about upload here ↓
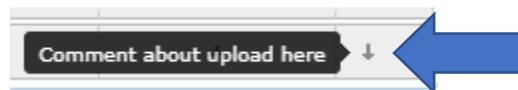
Click on the arrow ↓ to download the uploaded file if you need to review.

If the document you want to upload is NOT under the Documents section when you access the Process Screen, you can add the document name by clicking on the Options button on the Documents tab

Then select Upload Document from the list and **follow the steps listed above**.