MyBusiness Process Guide: Document Upload

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05/2019

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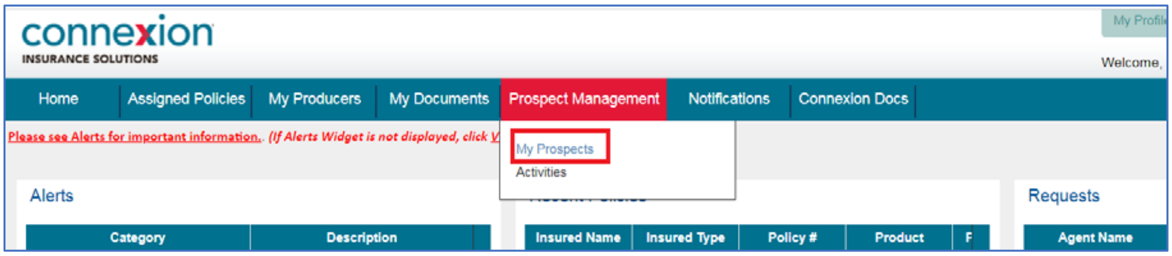
Document Upload

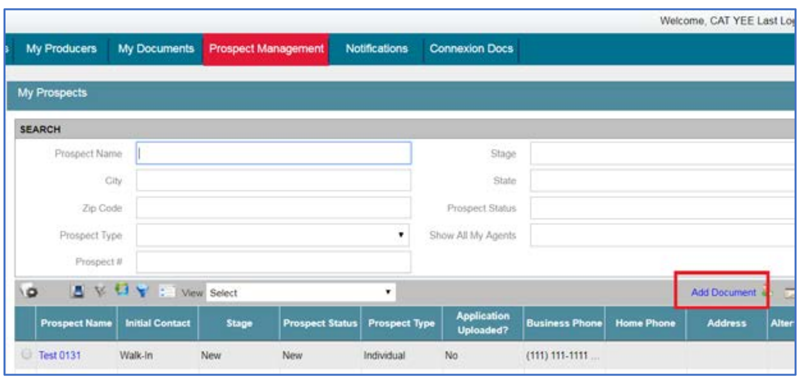
1. Log into MyBusiness

2. At the top of the page, hover over the ‘Prospect Management’ tab.

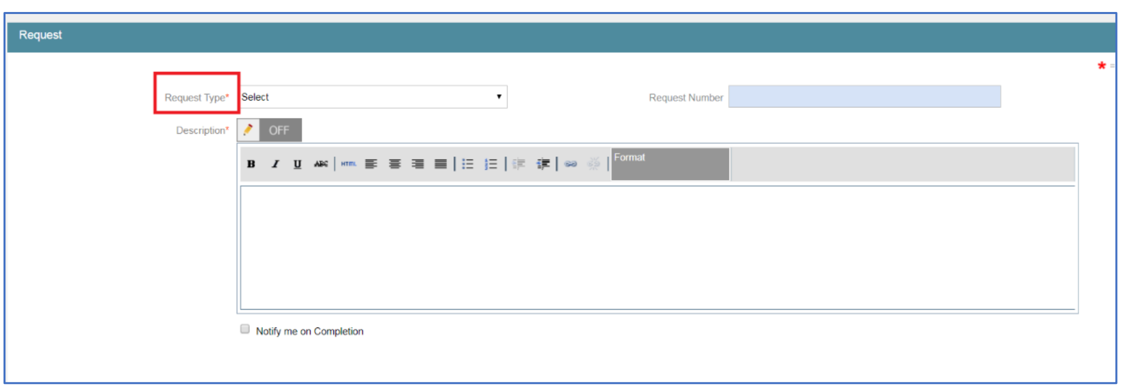
3. Select ‘My Prospects’



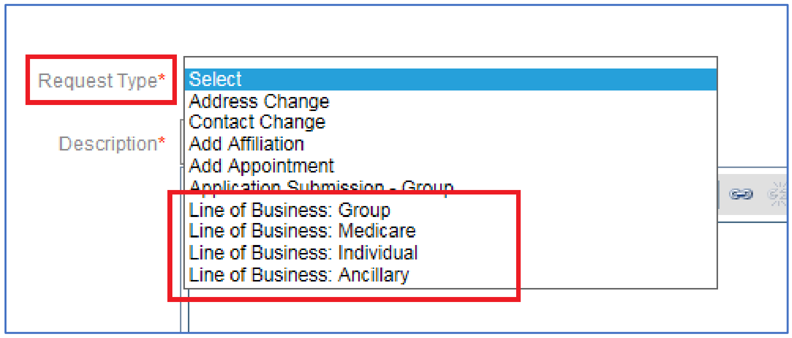
4. In the new screen, click ‘Add Document’



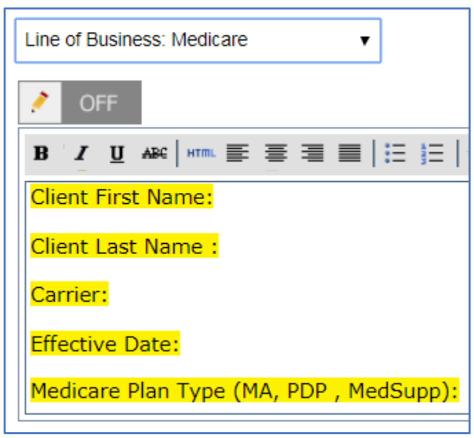
5. In the new page, Request, click the ‘Request Type’ drop down menu.

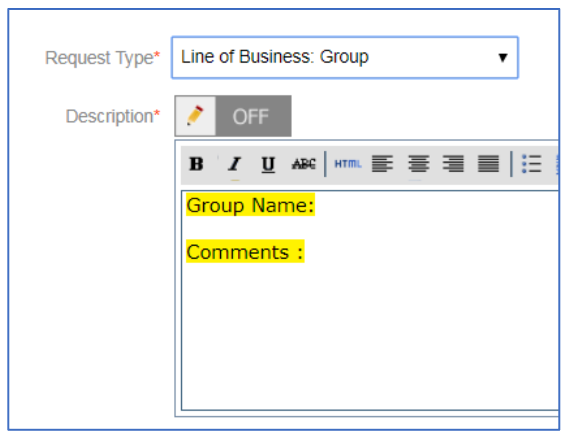


6. From the 'Request Type drop down menu, select the 'Line of Business' applicable to your document upload.

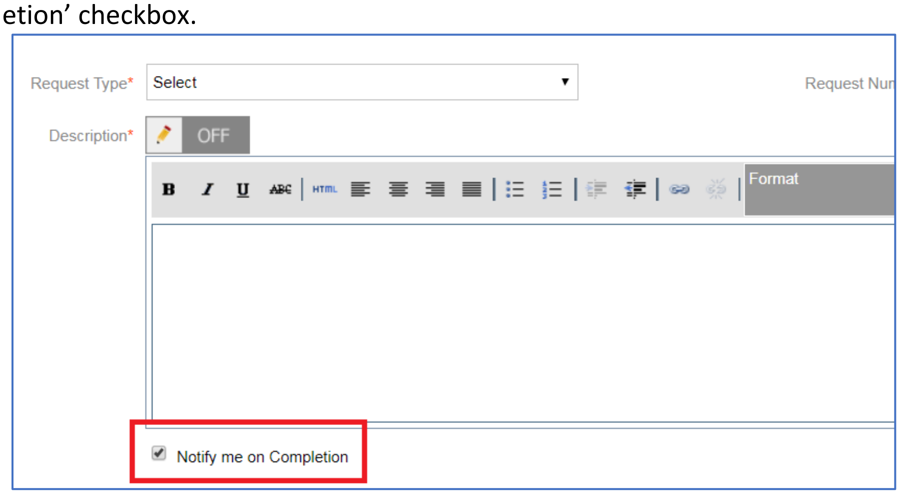


7. Depending on the selected 'Line of Business' – the form in the description box will change. Complete the highlighted fields before submission.

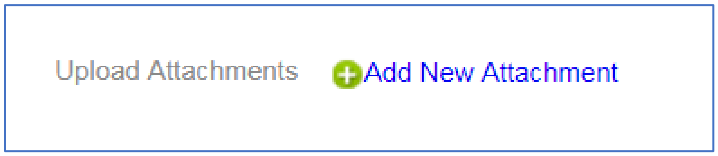




8. If you would like to be notified document was received by Connexion check the 'Notify me on Completion' checkbox.

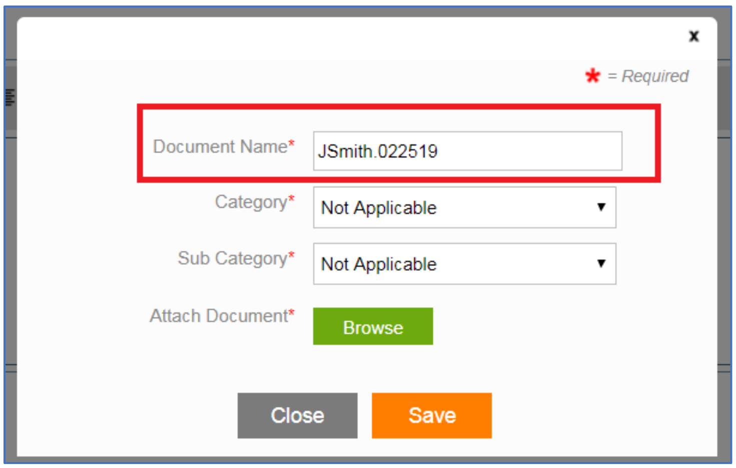


9. Click 'Add New Attachment' to upload your document.



10. In the new window, name document with Agent First Name initial, Agent Last name and current date (JSmith.022519).

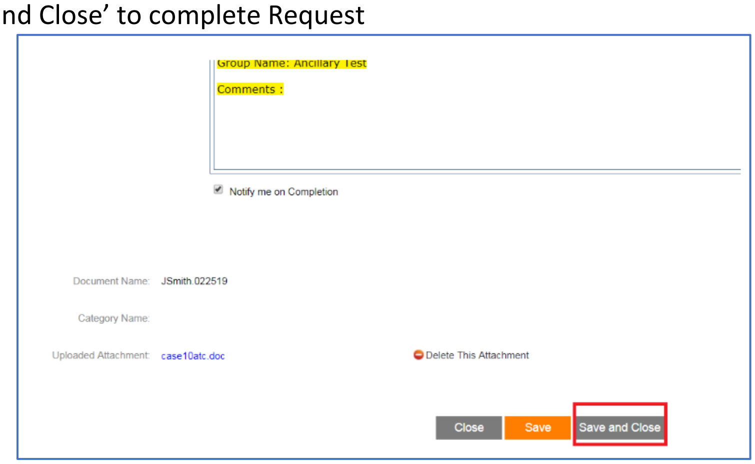
****Category and Sub Category fields are not required, leave as 'Not Applicable'.*



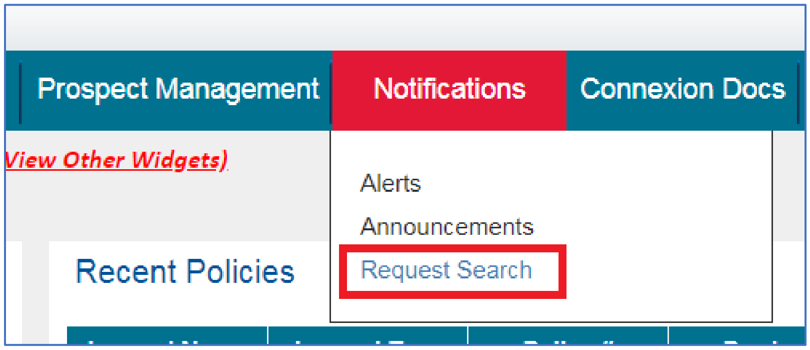
11. Click 'Browse' and select the file to upload.
    *You can only upload one file at a time.

12. Once file has been selected, click 'Save' to upload document

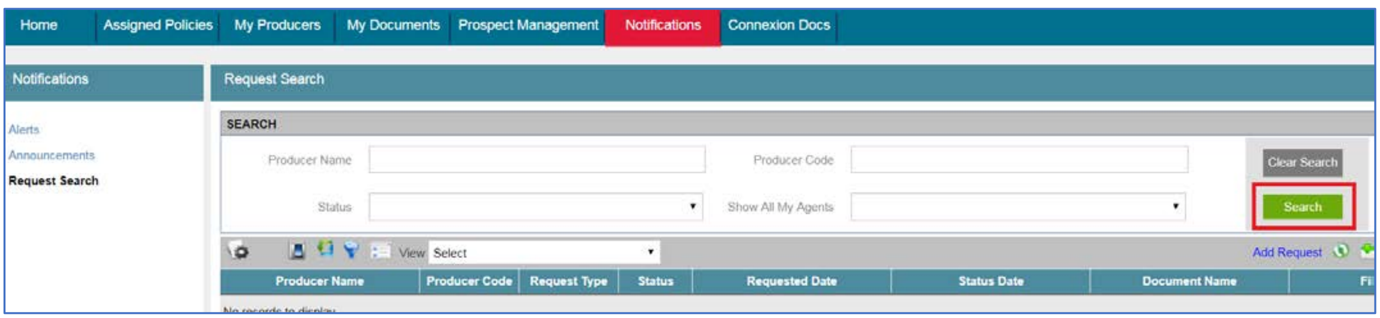
13. Click 'Save and Close' to complete Request



14. If you wish to locate the file you uploaded hover over the 'Notifications' tab and select 'Request Search'



15. In the 'Request Search' page, click 'Search'



16. Once Connexion has viewed and downloaded the document, you will receive an email notification that your request has been 'closed'.