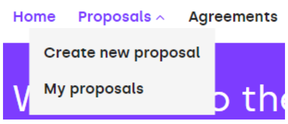
Novuna® Business Finance

My Proposals and Agreements: Quick Start Guide

Getting Started With Mercury: Your Digital Business Partner

1 To access **My Proposals**, hover over **Proposals** in the navigation bar and select **My Proposals**.

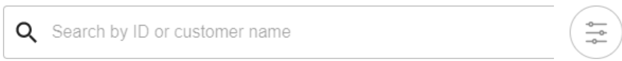


This will take you into the **My Proposals** section of the application. The default view is of the **Submitted** tab.

Here you will find a tabular view of all your submitted proposals (or those of your dealership dependant on user profile permissions) from which you can view, **amend** and/or look at overview information of a submitted proposal.

2 As the table of results may become lengthy over time, there are a number of filters available to help refine what is returned.

The first of these is the search field which allows you to search for a submitted proposal using either the **Proposal ID** or the **Customer Name**.



Clicking the three-sliders icon opens the additional filters which can be used – these are **Date Submitted** and **Status**.

Using the Date Submitted field refines the table to only show those proposals submitted on any given date. The Status dropdown opens a multi-select filter when clicked, allowing you to select as many or as few of the possible statuses for which a submitted proposal can be in to filter by. These statuses include **Approved**, **Referred**, **Ready for Sign**, and **Declined**.

Other Quick Start Guides available:

- Amending a Proposal
- Arranging Customer Repayments
- Assets and Multi-Assets
- Customers and Guarantors
- Save and Resume
- Submitting a Proposal

The complete Mercury User Guide can also be found in the Help and Support section of Mercury.

3 Once you have located a submitted proposal, you can select the vertical ellipsis which then gives you the option to open the proposal to **view** (from which you can then **amend**).

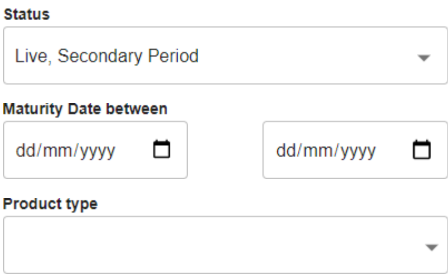
4 Like the **Submitted** tab, the **Saved** tab shows a tabular view of all your saved proposals (or those of your dealership dependant on user profile permissions) from which you can select and **resume**.

To locate a saved proposal within the table, you can search using either the **Proposal ID** or **Customer Name** within the search field. Additionally, you can further refine results by clicking the three-sliders icon and using the additional filters of **Date Saved** and **Saved By** (if a Sales Manager level user).

5 Once you have located a saved proposal, you can select the vertical ellipsis which then gives you the option to open the proposal to **resume** working through it.

6 The **My Agreements** tab works in much the same way – however here you will be presented with a tabular view of those submitted proposals which have progressed to agreements. The table will give some high-level detail of each agreement along with the current status.

The table can be refined by using the search field – which allows you to search using the **Agreement ID** – and/or the additional filters, found when clicking the three-sliders icon. The additional filters available are **Status**, **Maturity Date Between** and **Product Type**.



The Status dropdown opens a multi-select filter when clicked, allowing you to select as many or as few of the possible statuses for which an agreement can be in to filter by. These statuses include **Live**, **Cancelled** and **Matured**.

7 Once you have located an agreement, you can select the vertical ellipsis which then gives you the option to open the agreement to **view** the agreement overview of the selected agreement.

Tomorrow. Together