Novuna® Business Finance

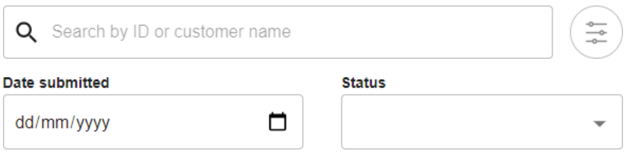
Amending a Proposal: Quick Start Guide

Getting Started With Mercury: Your Digital Business Partner

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

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.

As the table of results may become lengthy over time, there are a number of filters available to help refine the table of results. 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**. You can also use the additional filters (visible by clicking the three-sliders icon) to further refine the results.



2 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**).

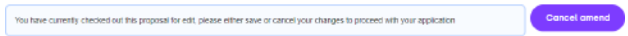
3 Once **view** has been clicked, you will be presented with the **Proposal Overview** screen. This provides you with a snapshot of some of the key information of the proposal, along with the information captured in each part of the proposal creation journey (**Product**, **Customer**, **Guarantor** etc…). Additionally, the **Conditions**, **Notes** and **Documents** tabs are available.

Other Quick Start Guides available:

- Arranging Customer Repayments
- Assets and Multi-Assets
- Customers and Guarantors
- My Proposals and Agreements
- Save and Resume
- Submitting a Proposal

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

4 From the **Summary** tab, you can click **Edit Proposal** to be taken into an editable view of the proposal. This checks the proposal out for editing, and you will be prompted of such by the blue banner at the top of the screen, alongside the **Cancel Amend** button which will revert any changes and return you back to the **Summary** tab.



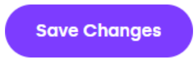
5 After submission, the **Introducer Reference** is the only editable field within the **Product Details** section.

The **Customer Details**, **Guarantor Details**, **Asset Details** and **Finance Details** each have a button which can be used to amend that section of the proposal. This will open a pop-up window applicable to that section which operates with the same behaviour seen for that section throughout the proposal creation journey.

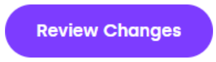
6 Once changes have been made within the applicable pop-up window and confirmed, the pop-up window will close, and those changes will be present within the editable view.

As with other areas of the application, there's also the opportunity to add any **Notes** or attach any applicable **Documents** to the proposal in the relevant sections at the foot of the page.

For all non-financial changes, you can make the changes then save using the **Save Changes** button.



7 However, when a financial change (which at this point is any change to the asset detail) is made, you will first need to review these changes prior to saving using the **Review Changes** button (which replaces the save changes button). This opens the **Finance Details** pop-up for review. Once the finance details have been checked and confirmed, changes can be saved and the submitted proposal checked back in.



Any changes made will then show on the **Proposal Overview** screen and be reflected on the submitted proposal. The proposal can then continue to progress along the workflow.

Tomorrow. Together