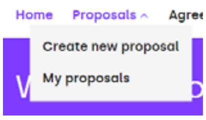
Submitting a Proposal: Quick Start Guide

Getting Started With Mercury: Your Digital Business Partner

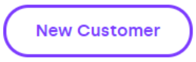
1 From the **Navigation Bar**, hover over **Proposals** to open the proposals menu. From here, select **Create New Proposal**.



2 This will open the **Product Details** screen. Complete the required product information, such as **Product Type**, **Product** and **Introductory Source**.

When complete, click **Next**.

3 Search for and select the required customer (creating a new billing address, if required). If the customer doesn't yet exist, click **New Customer**.



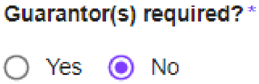
Select the **Customer Type**. The applicable form will open – capture all the required customer details.

For *Limited Companies*, the integrated **Companies House** search can be used to populate the business information.

The integrated **Postcode Search** can be used to populate the address details.

When complete, click **Submit**. The created customer will now be selected.

4 You can also indicate here if there is a **guarantor required** or not. Indicating "Yes" will take you through the guarantor selection process.



When complete, click **Next**.

5 Complete the required asset details, such as **Asset Type**, **Manufacturer**, **Model** and **Asset Cost**.

Multiple assets can be added through the use of either the **Quantity** field (to produce duplicate asset lines) or using the **New Asset** button on the Asset List view.

The assets added to the proposal will be collated within the **Asset List** table.

Asset list

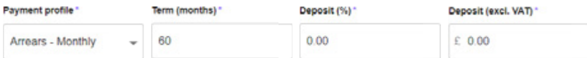
Type	Manufacturer	Model	Condition	Value	Supplier	
Cars	Audi	A1	New	£25,000.00	FRANCHISED	⋮
Cars	Audi	A1	New	£25,000.00	FRANCHISED	⋮

When complete, click **Next**.

Additional Information:

- Assets can be edited or removed by clicking the vertical ellipsis and selecting the appropriate option.
- Additionally, the asset page will vary dependant on whether a Hire Purchase product or a Finance Lease product has been selected (e.g. Residual Value on FL).
- The asset step is not present for Loan products.

6 Enter the financial information for the proposal, such as the **Payment Profile**, **Term** and **Deposit** information.



Available fields will vary based on the product loaded.

When complete, click **Next**.

7 Review the **Proposal Summary** screen, which will show all the information provided throughout the proposal creation journey.

Add any applicable **notes** and upload any relevant **documents** here too.

Once you are happy with the content of the proposal, click **Submit** to submit the proposal.

Other Quick Start Guides available:

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

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