

# Sopra Finance Platform

**Dealer Guide** 

**User Guide** 



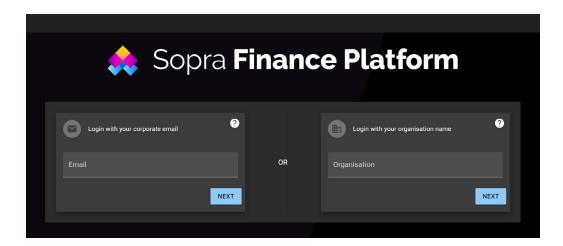
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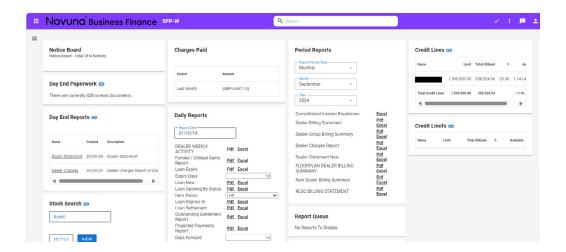
# **Dealer Login**

Please log into the new system (Sopra Finance System – Wholesale / SFP-W) by entering your **email address** and the organisation name **Novuna** followed by your security credentials.



## Portal – Sopra Finance Platform – Wholesale (SFP – W)

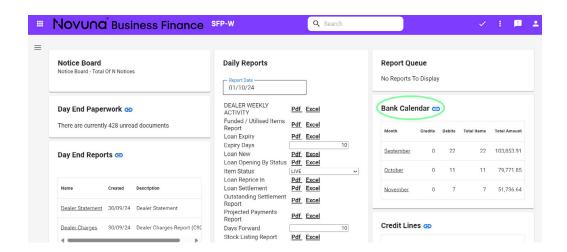
Once you have logged in successfully it should look like the example below



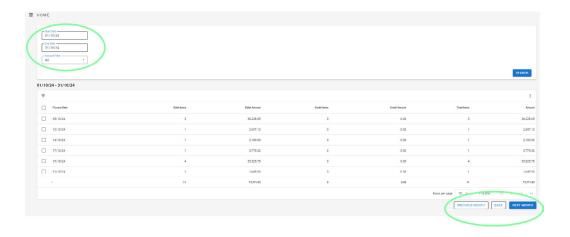


## **Bank Calendar**

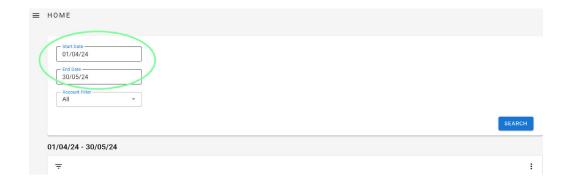
To view payments from the Bank Calendar for the last three months please click into the relevant month.



If you need to go back further than the 3 months simply click on the **Bank Calendar** to view all historical payments / transactions, either using the date range fields at the top left or using the previous month / next month option at the bottom right.

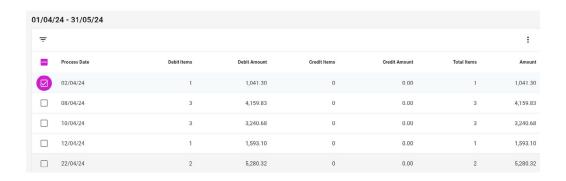


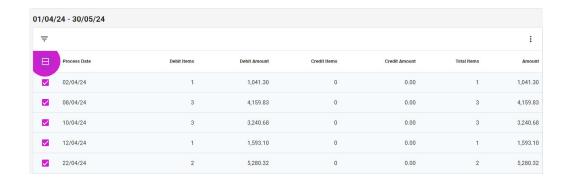
Please see as shown below the dates selected from April-May.



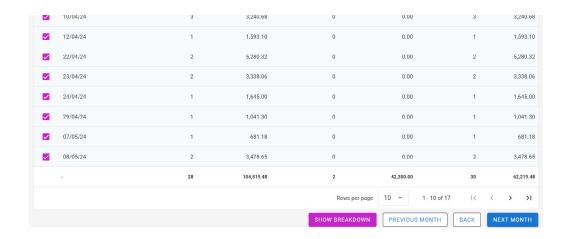


You will have the option to select just one transaction or by selecting all transactions for the month of April–May.



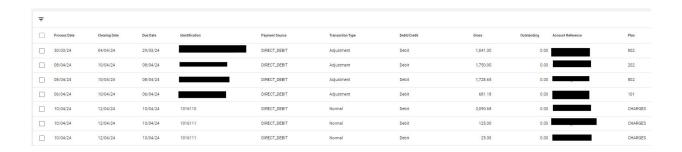


Then select **SHOW BREAKDOWN**.



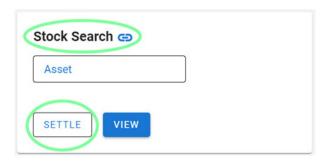


The breakdown then shows as below.



# **Settling Assets**

Enter the serial number in the **Asset** field and click **SETTLE**.

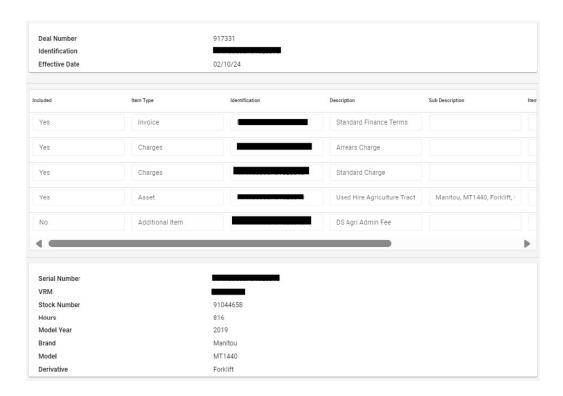


When you come to the second page as shown below you need to put a **tick** in the box against the asset you need to pay down, then click on the **CATEGORY ACTIONS** and **Settle** should appear.

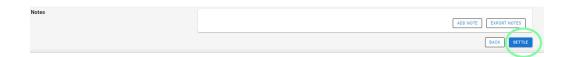




Click on **Settle** where you will come to the third page, scroll down to the bottom where you will need to click on **Settle** again for the last time.



#### Click Settle.



The asset has now been successfully settled.





# **To View Assets by Status**

To view assets by either live / settled or fully paid click on the Table Filters toggle.



Then change the status field to LIVE and click OK.



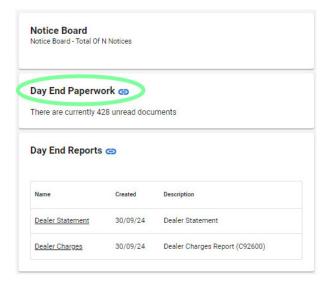
The status for all the live assets has changed as shown below.



You can repeat the steps above but changing the status to either SETTLED or FULLY PAID.

## **Invoices**

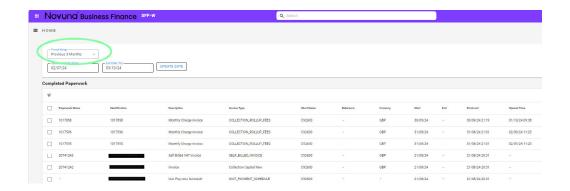
To view invoices click on Day End Paperwork.





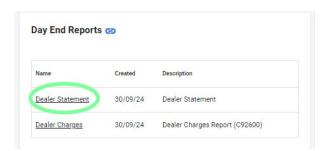
You can then select relevant invoices (please note invoices starting with 101XXX will be your monthly charges invoice/s and any invoices showing a serial number will be for the actual asset).

You can also select **Previous 3 Months** to give you a wider search or you can go back further by selecting the date range from and to.

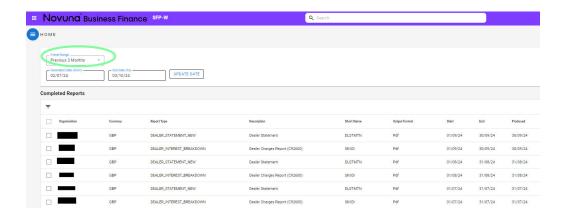


# **Monthly Statements**

To view the current monthly statement click on **Dealer Statement** for the current month.



To view historical monthly statements select **Previous 3 Months** or use the date range field entering the from and to date.





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