

## Save and Resume: Quick Start Guide

Getting Started With Mercury: Your Digital Business Partner

- 1** Once you reach the **View Assets** screen on the proposal creation journey, you are able to save the proposal using the **Save** button.



The ability to **Save** is available to you from this point onwards during proposal creation (as well as during proposal resume).

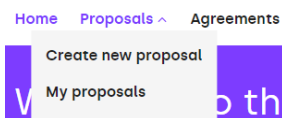
- 2** Saving the proposal will provide you with both a **Proposal ID** and a **Last Saved** date and time.

**Proposal saved - ID: A000313984 / Last saved 24/01/2022 22:03**

The **Proposal ID** can be used as a search term to locate the proposal in both the **Saved** and **Submitted** tabs within **My Proposals**. This **ID** also stays the same if the proposal progresses through to an agreement.

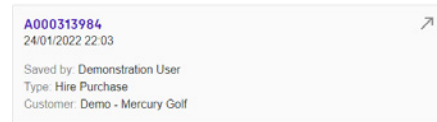
A saved proposal can then be found in the **Saved** tab in **My Proposals**. All the information added to the proposal up to the point of saving will be retained and present at the point of resumption.

- 3** Hovering over **Proposals** on the navigation bar and selecting **My Proposals** takes you to view what you have previously submitted and saved.



- 4** Within the **My Proposals** area, you'll first be presented with your four most recent saved proposals at the top of the screen. Clicking the arrow icon on any of these will take you into that proposal.

Recently saved



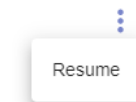
Alternatively, you can select the **Saved** tab which will show all your saved proposals in a tabular view.

You can manually search through the table of results for the desired proposal, or you can use the search and/or filter functions to refine the table of results.

- 5** A Proposal can be located by searching for either the **Proposal ID** (which was generated when the proposal was saved) or the **Customer Name**.

Additionally, you have the option to filter by the **Date Saved**. If you have Sales Manager permissions, you will also be able to refine by who within the dealership saved the proposal using the **Saved By** filter.

- 6** Once the required saved proposal has been located, it can be resumed by clicking the vertical ellipsis and selecting **Resume**.



- 7** Upon entering a saved proposal, you will be taken to the first step of the proposal creation journey, the **Product Details** screen.

This gives you an opportunity to review, and refamiliarise yourself with, the proposal details captured up to the point of saving.

Please note, the **Product Type**, **Product** and **Frame Agreement** cannot be edited – to change these, create a new proposal.

The proposal can now be progressed – either saving again or through to submission. Once the proposal has been submitted, it will no longer appear in the saved proposals list – instead, it will sit within the **Submitted** section in **My Proposals**.

### Other Quick Start Guides available:

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

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