

SalesDot User Manual

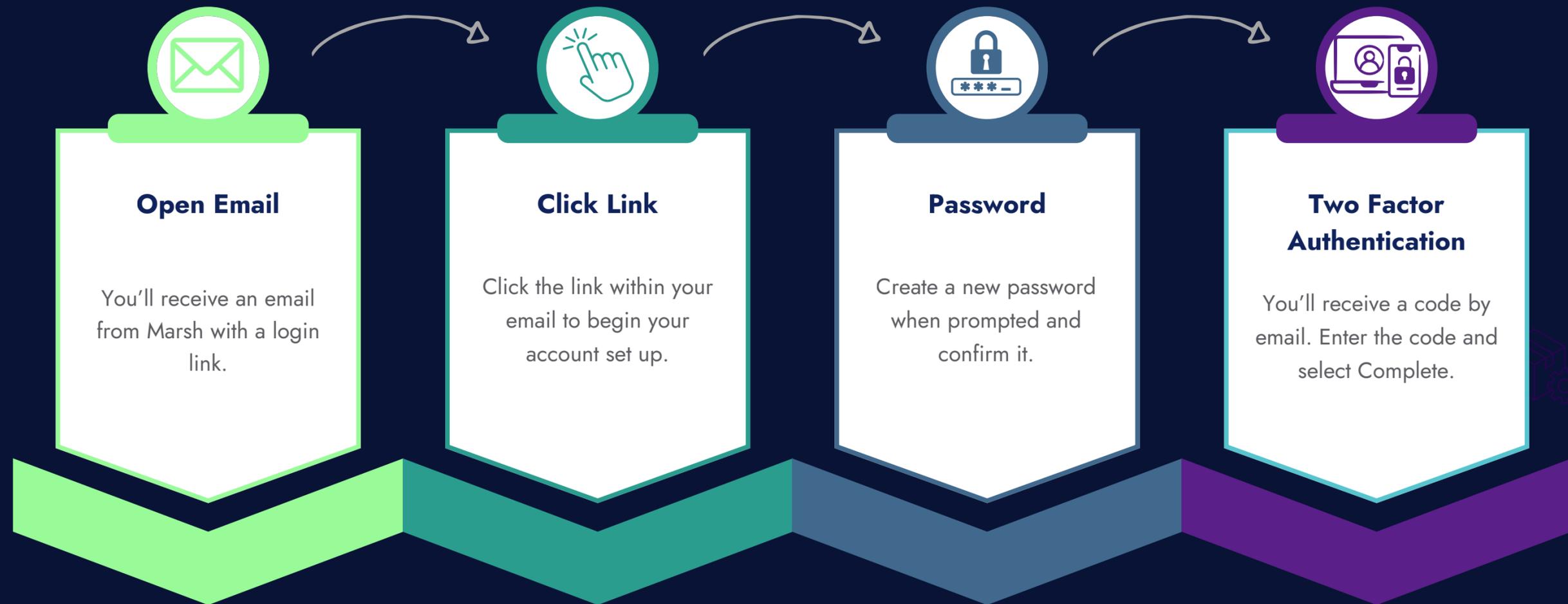
Welcome to the Partner Portal

Our Partner Portal has been designed to make managing your finance journey quick, simple and transparent. Through the portal, you can:

- ✓ Submit finance applications
- ✓ Track the status of applications in real time
- ✓ Upload customer supporting documents
- ✓ Create and manage quotations
- ✓ Generate finance documentation

This user guide will walk you through how to use the SalesDot portal and explain how it connects with our internal application processing system, helping you complete tasks efficiently and with confidence.

Logging in for the first time



Your password must include, a capital letter, a number, and a symbol

Your dashboard

Reference	Booking Funder	Suppliers	Hirers	Status	Tier	AIV status	Advance	Quote Vehicle	Expires At	View
17637860		Customer Direct	Mark Mercedes	Auto Decline	99			N/A N/A	15/02/2026 10:24:51	View
17626532		Customer Direct		Auto Decline	99			N/A N/A	13/02/2026 13:45:16	View
17626522		Customer Direct		Auto Decline	5		HP - £25,000.00	N/A N/A	13/02/2026 13:43:57	View
17624921		Customer Direct		Auto Decline	99			N/A N/A	13/02/2026 10:19:58	View
17617306		Customer Direct		Auto Decline	99			N/A N/A	12/02/2026 10:46:14	View
17601792	Marsh Finance Ltd	Customer Direct		Pending	3	FAIL	HP - £30,000.00 PCP - £30,000.00	HP RO67EHL	13/02/2026 14:30:05	View
17594979		Customer Direct		Underwrite Decline	6	FAIL	HP - £15,000.00	N/A N/A	08/02/2026 09:43:55	View

- 1 Marsh proposal reference**
A unique reference for each proposal
- 2 Customer Name**
Name of the hirer/customer
- 3 Status**
Current outcome of the proposal (e.g pending, conditional accept)
- 4 Tier**
This is the accepted credit tier of the proposal
- 5 Advance**
This is the accepted credit tier of the proposal
- 6 Quote / Vehicle**
This includes the registration of the quoted vehicle
- 7 Terms**
View your terms and rates by clicking here

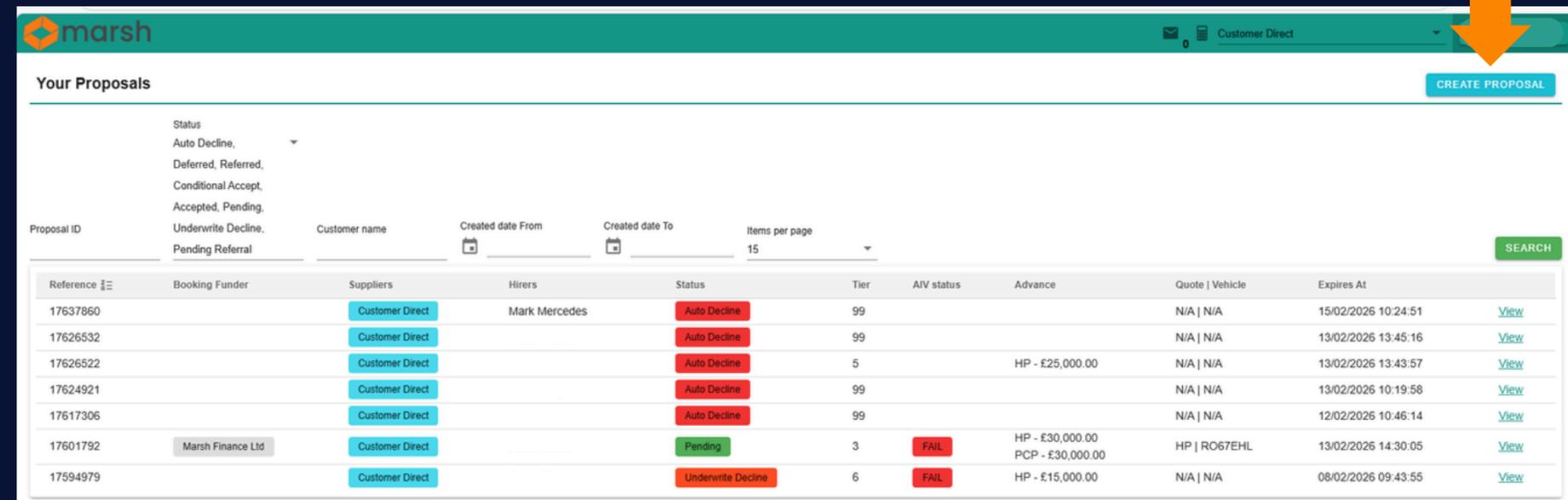
Creating a proposal

To create a proposal, select Create Proposal at the top of the page, underneath your login details.

You will be taken to Create a New Proposal → Personal Details.

Complete the following fields:

- Title
- First name
- Surname
- Date of birth
- Email address
- Mobile number
- Monthly income (net)



Reference	Booking Funder	Suppliers	Hirers	Status	Tier	AIV status	Advance	Quote Vehicle	Expires At	
17637860		Customer Direct	Mark Mercedes	Auto Decline	99			N/A N/A	15/02/2026 10:24:51	View
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17617306		Customer Direct		Auto Decline	99			N/A N/A	12/02/2026 10:46:14	View
17601792	Marsh Finance Ltd	Customer Direct		Pending	3	FAIL	HP - £30,000.00 PCP - £30,000.00	HP RO67EHL	13/02/2026 14:30:05	View
17594979		Customer Direct		Underwrite Decline	6	FAIL	HP - £15,000.00	N/A N/A	08/02/2026 09:43:55	View



Only the fields listed above need to be completed in the Personal Details section, you can ignore the rest.

Address history

Once you have completed the Personal Details section, you must also complete Address History and Employment History from the left-hand menu.

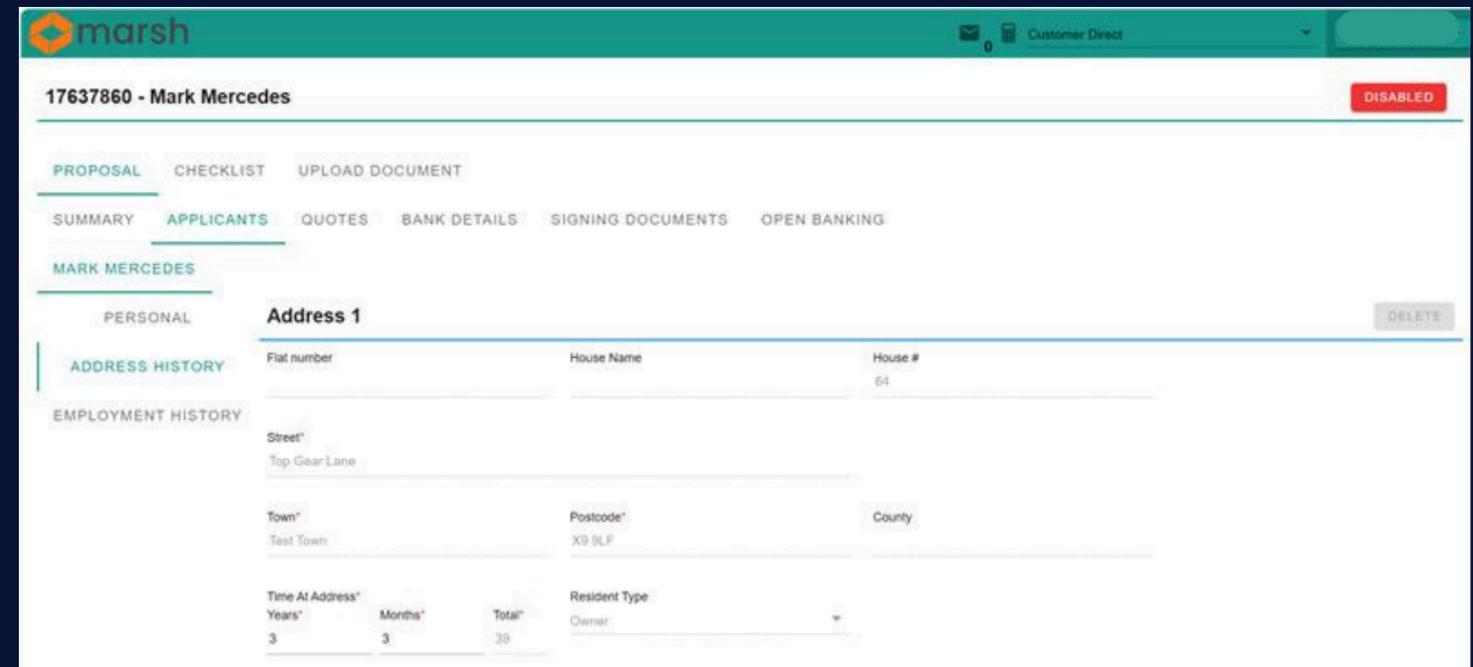
Address History

- A minimum of 3 years' address history is required
- Enter the details shown
- To add another address, select Add New Address

Employment History

- A minimum of 1 year's employment history is required
- Enter the details shown
- To add another employment record, select Add New Employment

Once all required sections are complete, select Create Proposal.



The screenshot shows the Marsh application interface for Mark Mercedes (ID: 17637860). The user is currently in the 'ADDRESS HISTORY' section. The form displays details for 'Address 1' with the following information:

Flat number	House Name	House #
		64

Additional fields include:

- Street*: Top Gear Lane
- Town*: Test Town
- Postcode*: X9 9LF
- County
- Time At Address*: Years: 3, Months: 3, Total: 39
- Resident Type: Owner

Navigation tabs at the top include: PROPOSAL, CHECKLIST, UPLOAD DOCUMENT, SUMMARY, APPLICANTS, QUOTES, BANK DETAILS, SIGNING DOCUMENTS, OPEN BANKING. A 'DISABLED' status is visible in the top right corner.

Proposal management

Master Proposal Dashboard

This screen shows key proposal details and includes tabs to create quotes, generate e-signature requests and send Open Banking links.

The screenshot shows the Marsh proposal management interface for proposal 17637860. The top navigation bar includes 'PROPOSAL', 'CHECKLIST', and 'UPLOAD DOCUMENT'. Below this, there are tabs for 'SUMMARY', 'APPLICANTS', 'QUOTES', 'BANK DETAILS', 'SIGNING DOCUMENTS', and 'OPEN BANKING'. The main content area is divided into three sections: 'Decision Summary', 'Booking Funder', and 'Applicant Summary'. The 'Decision Summary' section displays key details: ID (17637860), Tier (99), Status (Auto Decline | No Sub Status), Created At (15/01/2026 10:24:53), and Expired At (15/02/2026 10:24:51 (30 days)). The 'Applicant Summary' section shows a table with columns for Name, D.O.B, and Address, listing Mark Mercedes with D.O.B 1969-03-24 and Address 64, Top Gear Lane, Test Town, X9 9LF. The 'Booking Funder' and 'Your Notes' sections are currently empty.

Checklist / Outstanding Actions

Shows any outstanding items or additional information required before the proposal can be booked (paid out). Items are ticked off as they are completed.

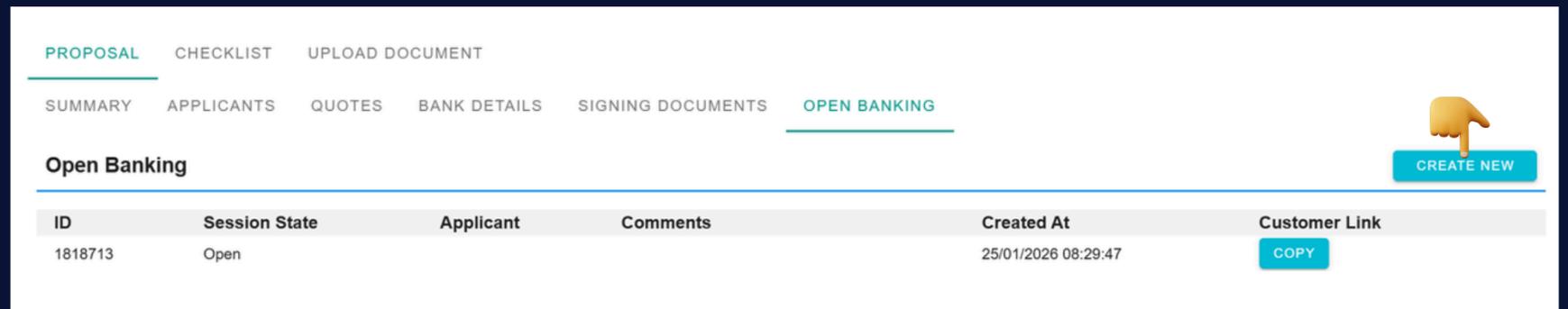
The screenshot shows the Marsh checklist for proposal 17637860. The checklist is titled 'External Requirements' and shows a progress of 88%. The items are listed as follows:

- Sign Documents Required: No Comment [Checked]
- Drivers License Required: No Comment [Checked]
- Dealer Invoice Required: No Comment [Checked]
- Dealer Bank Details Required: No Comment [Checked]
- OC Check Required: No Comment [Unchecked]
- Proof of Deposit: If a cash deposit is E5k or more, please upload an explanation of the source of funds & complete open banking on the account where the funds have accrued. [Checked]
- Internal Checks: No Comment [Checked]
- If your customer's country of birth is outside of the UK please provide either UK/ish passport, or Right to Remain share code (immigration status): No Comment [Checked]
- Auto Affordability has FAILED: Here is a new open banking link: <http://api-ob.marsh.systems/portal/0053cccb-5679-552b-8e88-2691fa3e95e2> [Auto Affordability Completed]
- Maximum monthly instalment E550: No Comment [Max Repayments]
- Auto Affordability has FAILED: Here is a new open banking link: <http://api-ob.marsh.systems/portal/0053cccb-5679-552b-8e88-2691fa3e95e2> [Auto Affordability Completed]

Open banking process

How to get started:

1. Select Open Banking.
2. Choose Create New.
3. Copy the Customer Link.
4. Send the link to your customer.



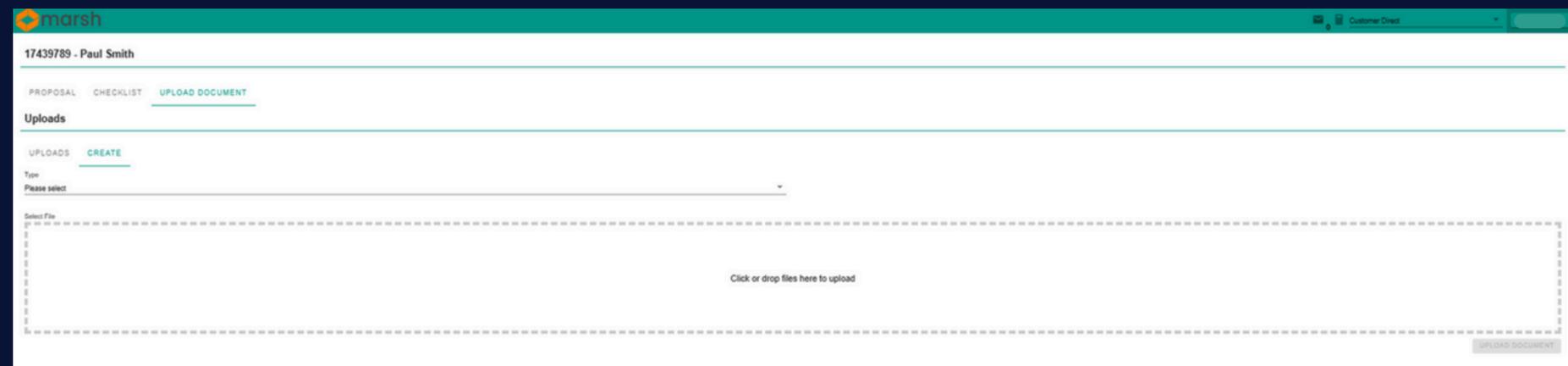
ID	Session State	Applicant	Comments	Created At	Customer Link
1818713	Open			25/01/2026 08:29:47	COPY

The link and the customer's maximum eligible repayment amount will appear in your **Checklist** once assessed.

Uploading documents

To upload a document:

- Select the Upload Document tab.
- Choose Create. The upload fields will appear below.
- Under Type, select the document type.
- Select Upload Document and attach the file.
- Select Update Proposal to save.

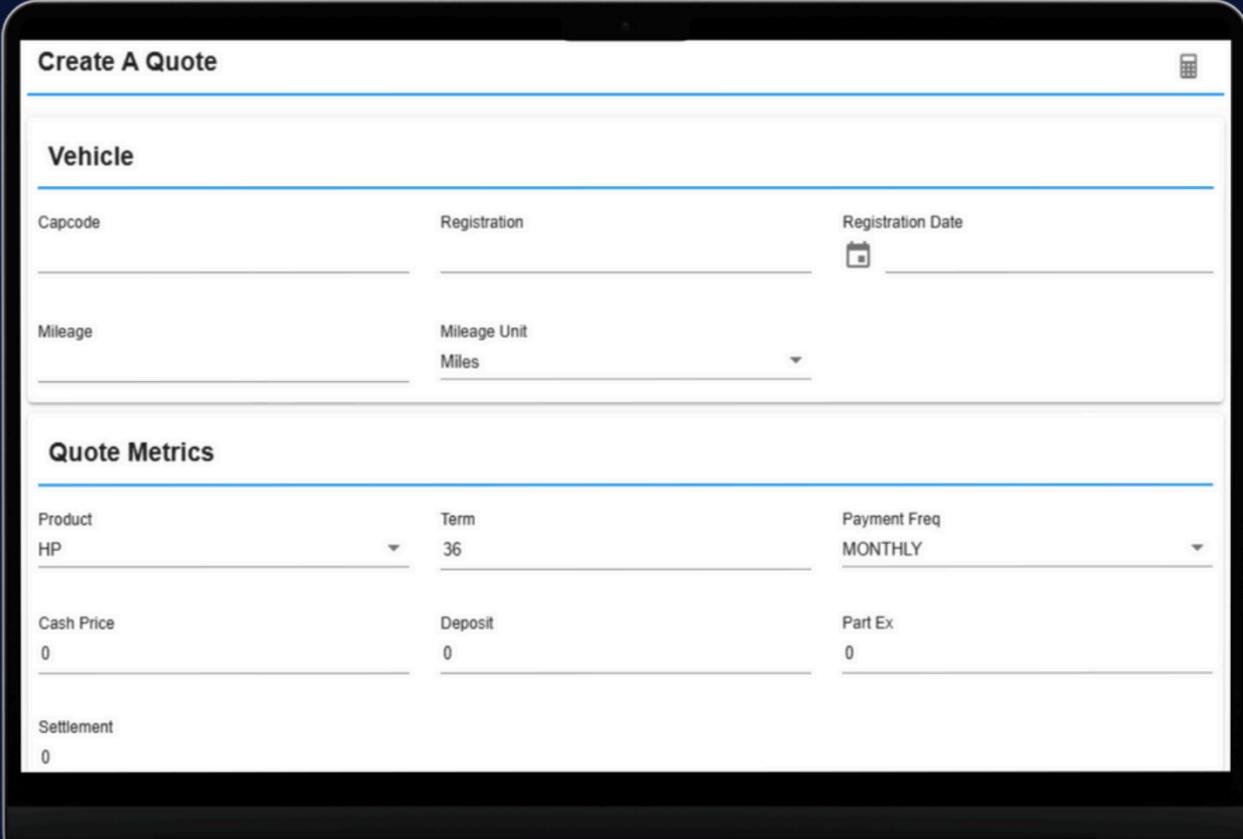


The screenshot displays the Marsh web application interface for uploading a document. At the top, the Marsh logo is visible on the left, and the user's name '17439789 - Paul Smith' is on the right. Below the header, there are three tabs: 'PROPOSAL', 'CHECKLIST', and 'UPLOAD DOCUMENT', with 'UPLOAD DOCUMENT' being the active tab. Underneath the tabs, there is a section titled 'Uploads' with two sub-tabs: 'UPLOADS' and 'CREATE', where 'CREATE' is selected. Below the sub-tabs, there is a 'Type' dropdown menu with the text 'Please select' and a downward arrow. Below the dropdown is a 'Select File' label and a large dashed rectangular area for file upload. Inside this area, the text 'Click or drop files here to upload' is centered. In the bottom right corner of the dashed area, there is a small 'UPLOAD DOCUMENT' button.

Generating a quote

To generate a quote:

- Select the **Quote tab**, then choose Create a Quote.
- In the **Vehicle section**, enter the vehicle registration and mileage only.
- In **Quote Metrics**, complete the required fields.
- Select **Create Quote**. The quote will then appear in the quotes section.



Create A Quote

Vehicle

Capcode	Registration	Registration Date
<input type="text"/>	<input type="text"/>	<input type="text"/>
Mileage	Mileage Unit	
<input type="text"/>	Miles	

Quote Metrics

Product	Term	Payment Freq
HP	36	MONTHLY
Cash Price	Deposit	Part Ex
0	0	0
Settlement		
0		



The 'Term' is set to a default of 36 months; you can change this to suit the customer's preferences.

Expanding a quote

View Proposal Quote - 2866077 Created By 'AFI' at 15/01/2026 11:51:31

Financial Fields			
1) Cash Price	£12,000.00	First payment	£306.53
2) Part Ex £0.00, Deposit £1,000.00	£1,000.00	Average payment	£306.53
2.1) Settlement	£0.00	Final payment	£316.53
3) Advance (credit) ((1 + 2.1 - 2))	£11,000.00	Term	60
4) Interest	£7,391.80	Interest Rate	24.90%
5) Doc Fee	£0.00	APR	24.90%
6) Option Fee	£10.00		
7) Total Charge (4 + 5 + 6)	£7,401.80		
8) Total Payable (1 + 7)	£19,401.80		
9) Balance Payable (3 + 7)	£16,401.80		

Other		Vehicle	
Product	HP	Quoted Vehicle Mileage	32100 MILES
Commission	£0.00	Quoted Vehicle GGR	£11,855.00
Subsidy Amount	£0.00	LTV %	92.79%
		LTV Max Price	£11,855.00
		Vehicle Device Required	No

Vehicle Details	
Registration	MW20KBY
Registration Date	10/08/2020
Cap Code	FOFO10SX55HPTM 6
Description	MW20KBY, FORD, FOCUS HATCHBACK, 1.0 EcoBoost 125 ST-Line X 5dr, ST-Line X, 32100 MILES
Colour / Doors	WHITE / N/A

Other	
Imported	No
Exported	No
Scrapped	No

To view a quote in more detail, select Expand to see the full financial breakdown.

To close the view, click anywhere outside the window. Important: If the customer wishes to proceed, select the green **Activate** button.

This enables you to begin the e-sign process.

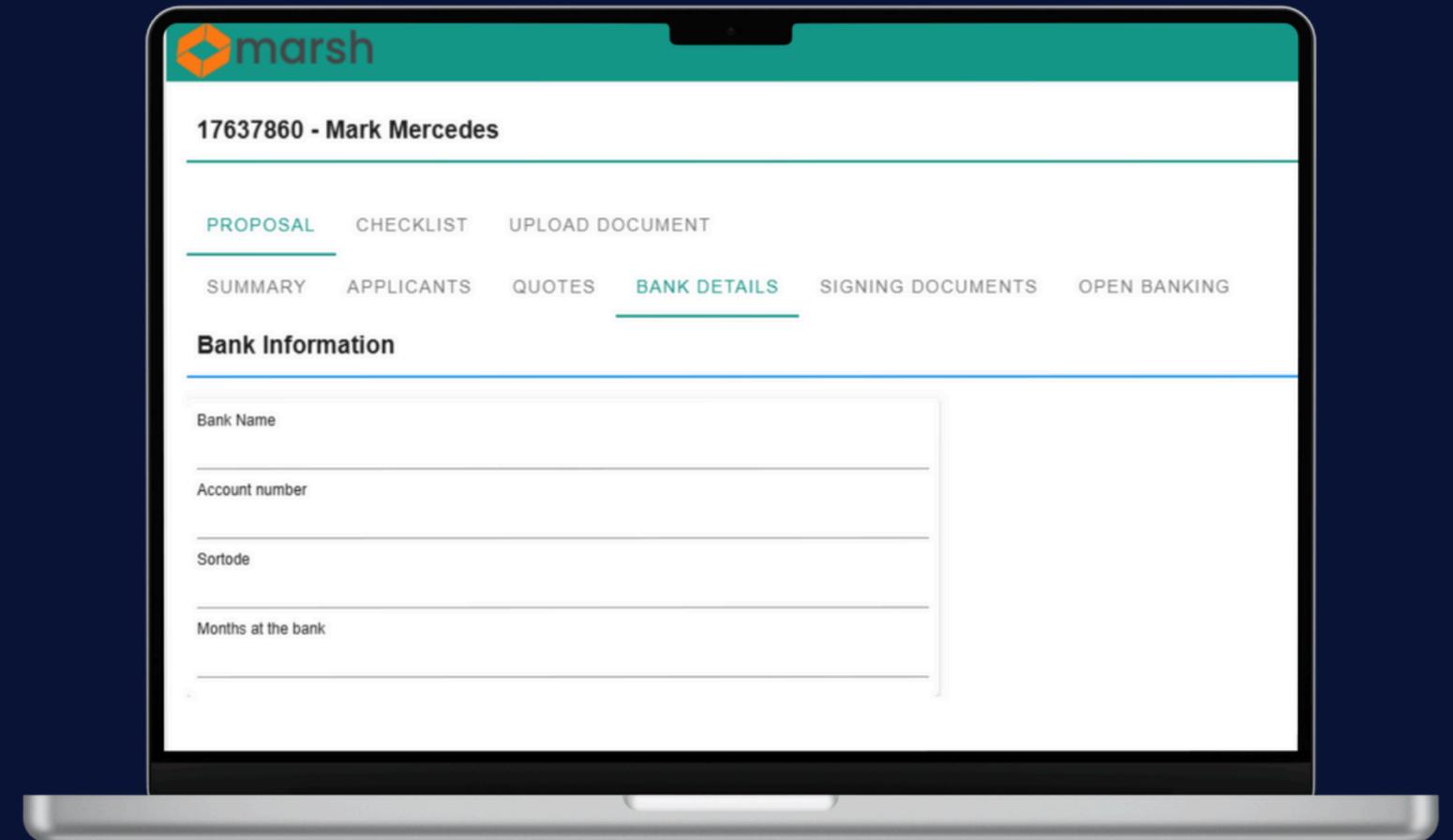
Bank details

Customer bank details must be completed before an e-signature can be generated.

Please ensure the following information is entered accurately:

- Account holder name
- Bank name
- Sort code
- Account number

Once all bank details are complete and saved, you will be able to proceed with generating the e-sign.



The screenshot displays the Marsh application interface on a laptop. The top navigation bar is teal with the Marsh logo. Below the header, the user's name '17637860 - Mark Mercedes' is shown. A secondary navigation bar contains links for 'PROPOSAL', 'CHECKLIST', 'UPLOAD DOCUMENT', 'SUMMARY', 'APPLICANTS', 'QUOTES', 'BANK DETAILS', 'SIGNING DOCUMENTS', and 'OPEN BANKING'. The 'BANK DETAILS' link is highlighted. The main content area is titled 'Bank Information' and contains a form with the following fields: 'Bank Name', 'Account number', 'Sortode', and 'Months at the bank'. Each field has a corresponding input line.

Producing esign documents

Finance documents can be generated from the Signing Documents section.

1. Select Signing Documents.
2. Choose Start Signing Process.
3. A secure e-sign link will be generated.

Copy and send this link to your customer so they can review and complete the e-signature.

