

1 After the **Product Details** page, you will need to add a customer to the proposal.

Use the **Customer Search** field to see if there is an existing entry for the customer you wish to load.

TIP: You can search for a customer using name, postcode, company registration (for limited companies) or Third-Party ID.

2 If you need to create a customer, click the **New Customer** button.

New Customer

Select the **Customer Type**. This will define the information required in the form which follows.

The **Companies Search** field (available for Limited Companies) is integrated with Companies House. The **Postcode Search** field is integrated with the Royal Mail Postcode Finder.

Companies search

Search companies by name, postcode or registration number

Postcode search

Search address by postcode

Complete the required information and click **Submit**.

Additional Information:

- There are differences to the **Customer Details** captured based on the **Customer Type**. The below are in addition to the generic details captured across all types.
- **Public/Private Limited Company and LLP:** Integrated with Companies House search, and captures Established Date, Company Registration and Trading As.
- **Non-Limited Companies:** Do not have the above fields, just Business Name.
- **Partnerships:** Allows the information for up to three additional partners.
- **Sole Trader:** Capture both Business Address and Home Address.
- **Private Individual:** Industry Type field becomes Occupation
- **Agriculture and Farming Industry Types:** These will ask for Acreage Owned and Acreage Rented.

Other Quick Start Guides available:

- Amending a Proposal
- Arranging Customer Repayments
- Assets and Multi-Assets
- 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.

3 The search results from **Step 1** may provide both **bold** and non-bold results. The bold results are customers which are already linked to your dealership. If you need to use a non-bolded entry, that customer will first need to be linked to your dealership using the **Link Customer** button.

Link Customer

When a non-bold customer is selected, the **Next** button becomes **Link Customer**. Clicking **Link Customer** opens the current details for that customer for review (in the same layout as the **New Customer** form). Certain details cannot be edited – such as **Company Registration** and **Customer Type** – and these fields will be read only.

Review and amend the customer details as required and **Submit**. The customer will now show as a **bold** entry in the search table.

4 The third approach is to **Create a New Billing Address** for a linked (bold search entry) customer.

Create New Billing Address

This creates an additional entry for that customer registered at another address, with different details (if applicable).

The process is very similar to linking a customer.

5 Once the customer has been selected, the **Guarantor Required** checkbox indicates whether a guarantor is (or guarantors are) to be added to the proposal.

Guarantor(s) required? *

☐ Yes ☒ No

"Yes" will begin the guarantor selection process.
"No" will continue the proposal to **Asset Details**.

Selecting **Personal Guarantee** as the **Guarantor Type** limits the search results in the **Guarantor Search** to *Private Individuals*. The **Create Guarantor** form is also applicable to Private Individuals.

Selecting **Corporate Guarantee** as the **Guarantor Type** limits the search results in the **Guarantor Search** to *Limited Companies (Public/Private Limited Company and LLP)*. The **Create Guarantor** form is also applicable to Limited Companies.

Multiple guarantors can be added to a proposal by first adding one guarantor, then using the **New Guarantor** button on the **View Guarantors** screen. A maximum of three guarantors can be added to a proposal.

TIP: The bold and non-bold search results for guarantors work in the same way as the customer results and mean the same thing.