marlin
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MarlinNet
Reference Guides

How to View Invoices

- **First log into MarlinNet. Select the Active Customer Search tab and search for your customer.**

- **Click the Customer Name listed from your Active Customer Search Results**

How to View Invoices *(cont'd)*

• Click the List Contracts tab in the Customer Detail to view active contracts.

• Click the Contract Number to enter contract detail page.

How to View Invoices *(cont'd)*

- **Click the Invoices tab to view all available invoices.** *Only last 12 months available.*

- **Click View Invoice from the list of available invoices. You can use the arrows at the bottom left to browse additional invoices.**

MarlinNet User Management

MarlinNet Administrators have access to the User Accounts tab:

User Accounts

- **Click the tab to access the User Setup Screen.**

- **Click the +New User button to setup a new user and complete the required fields highlighted in red (below) as well as any optional fields.**

User Setup

+NEW USER

Existing User? Use Search to find and edit existing users:

Existing User Report

Account Information:

User Record ID:	
User Login ID:	
User Dealer ID:	Super Test Vendor ▾
User First Name:	
User Middle Name:	
User Last Name:	
User Address Line 1:	
User Address Line 2:	
User City:	
User State:	
User Zipcode:	
User Email:	
User Office Phone:	
User Mobile Phone:	

Account Status: Active Active ▾

Authorization Level: Minimal ▾
- Minimal
- Moderate
- Admin

Password Manager

Password: Initiate/Reset

SAVE

Legal Disclaimer:

In connection with the Service, the individual identified by the applicable equipment dealer (the "Dealer Administrator") shall be responsible for creating, assigning and maintaining passwords and User IDs for such equipment dealer's entire organization. The Dealer Administrator shall provide Marlin with certain registration information, all of which must be accurate and updated as appropriate. The Dealer Administrator shall be responsible for maintaining the confidentiality of his/her password and for all additional passwords he or she creates in connection with the service. The Dealer Administrator shall immediately notify Marlin of any known or suspected breach of security, including loss, theft or unauthorized disclosure of a password or User ID. The Dealer Administrator is responsible for all usage or activity in connection with the Dealer Administrator's organization. In the event the Dealer Administrator wishes to delete a user and substitute another user for the deleted user, the Dealer administrator shall notify Marlin, which shall then cancel the deleted user's User ID and password. Similarly, if the Dealer Administrator wishes to add additional users of the service, the Dealer Administrator hereby acknowledges and agrees that he or she is responsible to create User IDs and Passwords for such users and is accountable for the actions taken by those users.

Legal Disclaimer Acceptance

I Agree → ☐

- **The User Login ID is created by you and cannot be altered by the user. First initial last name format is recommended for ease of use.**

- **User ID Requirements:**
  - Characters must all be lower case (ex: jsmith)
  - No special characters or numbers

User Login ID: [   ]

MarlinNet User Management *(cont'd)*

- **The Password Manager allows Administrators to create a temporary password for a new user. The password you create will only be a temporary password for initial login. They will be prompted to change it to something they prefer once they login with the temporary password.**

- **Password Requirements:**
    - Minimum 8 characters
    - One capital letter
    - One lower case letter
    - One special character

Password Manager

Password: Initiate/Reset

Temporary Password suggestions
Spark123!
Marlin123!
Finance123!

- **Authorization Level: MarlinNet offers three authorization levels which you can assign to a user. A definition of each level is provided below:**

Minimal View - user is able to view application details for applications they enter (not all applications). They can submit applications directly to Marlin's credit team, edit their account information and access all search tabs (can search/pinpoint applications they've entered not all applications).

Authorization Level:

Minimal
Minimal
Moderate
Admin

Moderate View - user is able to view ALL application activity within your organization including quarterly to date reporting. They can also submit applications directly to Marlin's credit team, edit their account information and access all search tabs (can search/pinpoint ALL applications submitted by your organization).

Administrative View - Admin's have full access including reporting tabs: Life to Date (LTD) and Year to Date (YTD) data, portfolio and service pass thru reports. Admin's can also access the User Account tab which would give them the ability to add new users and edit authorization levels for any user.

MarlinNet User Management *(cont'd)*

- **MarlinNet Password Callouts:**

  - Passwords users create after initial login are not stored in Marlin's database. If a user is locked out, the Admin can reset their password to a new temporary password at which point the user can change it to something they prefer.

  - If any user (minimal, moderate or Admin) fails to login to MarlinNet once within a 90-day period, their account will deactivate. An email notification will be sent to the user 5 days prior to deactivation. If the user fails to reset, their account will lock at which point they'll need to reach out to the account Admin or their Marlin representative to initiate a password reset.

  - MarlinNet will require a password reset every 90 days regardless of login frequency. An email notification will be sent to the user 5 days prior to the 90-day mark. If the user fails to reset, their account will lock at which point they'll need to reach out to the account Admin or Marlin representative to initiate a password reset.

- **Click the Legal Disclaimer Acceptance checkbox and lastly the "Save" button to trigger an automated email to the new user with their login credentials you setup. Nothing else is required on your part.**

- **Additional Features:**

  - Account Status: You can activate or deactivate any user account by selecting "Active" or "Inactive." Please note that deactivating an account does not delete the account from the MarlinNet database. Please reach out to our Product Analyst to have a user account(s) completely deleted from the MarlinNet database.

  - Existing User Report: Download an existing user report to see your entire MarlinNet user list.

  - Existing User Search: Use the search bar at the top to search for existing users and edit their authorization level.

  - Opt-In Notification: Select whether or not a User should receive notifications on Application statuses.
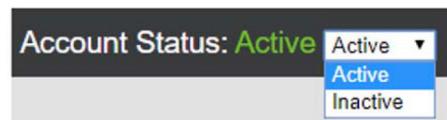
How to Pinpoint Service Pass Thru's

Marlin provides its partners with the option to have service pass through billing where service or maintenance fees are billed and collected by Marlin and passed thru to the servicing partner.

Partners using this feature can now search for Service Pass Thru billings by date range and get data on historical pass thru billings for each customer.

MarlinNet will also show coverage for each pass thru payment.

1. **Click the "Service Pass Thru" tab on the left-hand navigation menu under the Reports category.**

2. **If you received an ACH check that you don't know about simply search by Check # or specific Date Range. If you're doing a reconciliation pass thru posting for a specific account, search by Contract # or Customer name.**

Reports

🖿 Dealer Stats

🖿 Portfolio Report

🖿 Service Pass Thru
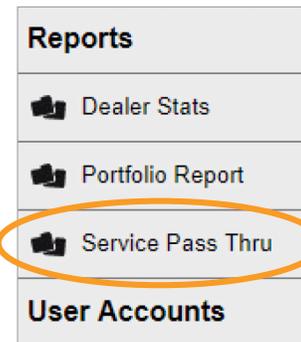
User Accounts

Service Pass Thru Search

Please begin searching by entering at least three characters into a search category below.

Search by Name:

Search by DBA Name:

Search by Contract Number:

Search by Customer Account Number:

Search by FED ID:

Search by Phone Number:

Search by Check #:

Search by Check/ACH Date Range: ▦ to ▦
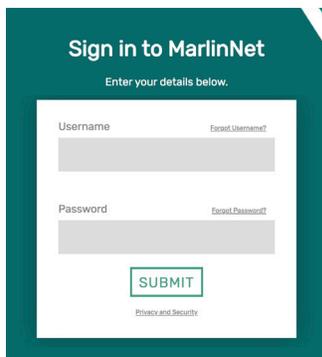
Search

## Service Pass Thru Results

Service Fee Collected

Dealer

Customer Name	DBA Name	Marlin Check/ACH Number	Marlin Check/ACH Date	Contract Number	Coverage Period From	Coverage Period To	Billed $	Paid $	Customer Owes
		221065	09/11/2017		08/01/2017	09/01/2017	$43.34	$43.34	$0.00
		225538	10/11/2017		09/01/2017	10/01/2017	$43.34	$43.34	$0.00
		229765	11/15/2017		10/01/2017	11/01/2017	$43.34	$43.34	$0.00
		232428	12/08/2017		11/01/2017	12/01/2017	$43.34	$43.34	$0.00
		235917	01/09/2018		12/01/2017	01/01/2018	$43.34	$43.34	$0.00
		242710	03/09/2018		01/01/2018	02/01/2018	$47.67	$47.67	$0.00
		242710	03/09/2018		02/01/2018	03/01/2018	$47.67	$47.67	$0.00
		246234	04/09/2018		03/01/2018	04/01/2018	$47.67	$47.67	$0.00
		253235	06/08/2018		04/01/2018	05/01/2018	$47.67	$47.67	$0.00
		256525	07/10/2018		05/01/2018	06/01/2018	$47.67	$47.67	$0.00
		256525	07/10/2018		06/01/2018	07/01/2018	$47.67	$47.67	$0.00
		263119	09/10/2018		07/01/2018	08/01/2018	$47.67	$47.67	$0.00

How to Review Buyout Details
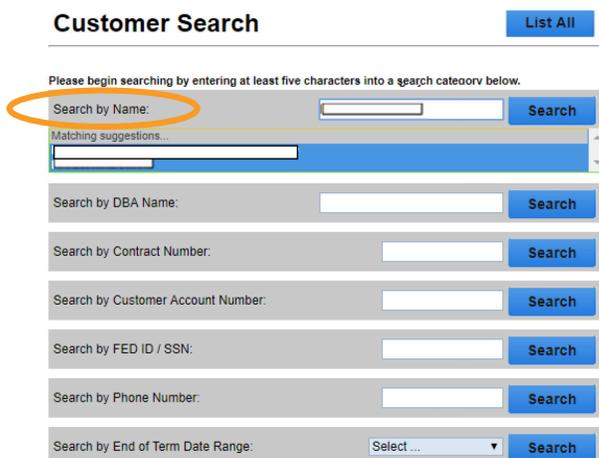# & Complete Tradeup Quoting

1. **Log in to your MarlinNet account:** www.marlinnet.net

2. **Locate your existing Marlin customer by clicking the "Customer Search" tab.**
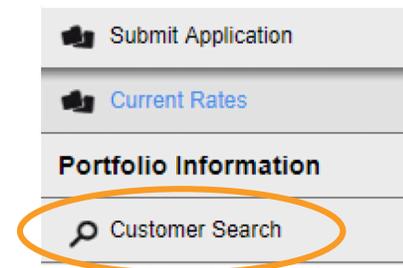
3. **Locate the customer by using any of the search options provided:**

4. **Click on the customer's name to pull their existing contracts.**

5. **Click on "Quotes" across from the contract # to review quote details.**

6. **Review Buyout/Tradeup details on the next page and simply click on a green button to create a Tradeup (keep) or (return) application. It's that simple!**