

MarlinNet Reference Guides

How to View Invoices

MarlinNet User Management

How to Pinpoint Service Pass Thru's

How to Review Buyout Details & Complete Tradeup Quoting

How to View Invoices

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

Active Customer Search [List All](#)

[Clear](#) [Submit App](#)

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

Search by Name: [Search](#)

Search by DBA Name: [Search](#)

Search by Contract Number: [Search](#)

Search by Customer Account Number: [Search](#)

Search by FED ID / SSN: [Search](#)

Search by Phone Number: [Search](#)

Search by End of Term Date Range: [Search](#)

Search by Current Del. Status: [Search](#)

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

Active Customer Search Results [Choose # of Results per page](#) [XLS](#) [PRINT](#)

◀ Page 1 of 1 ▶

Customer Name	DBA Name	Phone #	FED ID/SSN	Able to View	Last Dealer
ABC Customer		555-555-5555		Yes	

[Submit App](#)

◀ Page 1 of 1 ▶

How to View Invoices *(cont'd)*

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

The screenshot shows the 'Customer Detail' page. On the left is a navigation sidebar with sections: Dashboard, Applications (Application Search, Submit Application, Current Rates), Lease Transaction Center (Active Customer Search, Asset Search), My Account (My Account, Dealer Metrics, Portfolio Report), and Change Dealer. The main content area is titled 'Customer Detail' and includes a 'Customer CR Account: 123456'. Below this are 'Customer Name/Address' details for 'ABC Customer' and 'Customer Summary Information' with an 'Application Detail' table. At the top right, there are two tabs: 'LIST CONTRACTS' (highlighted with an orange circle) and 'PRINT'.

Contract Number	Contract Name	Asset Cost	Del. Cond.	Next Due Date	Total Due	TermDt
000-1234567-000	ABC Company	45,884.93	0	12/01/2017	1,116.59	05/01/2019

- Click the **Contract Number** to enter contract detail page.

This screenshot shows the same 'Customer Detail' page, but with the 'Open Contracts' table visible at the bottom. The 'Contract Number' '000-1234567-000' is circled in orange. The table has columns for Contract Number, Contract Name, Asset Cost, Del. Cond., Next Due Date, Total Due, and TermDt. Above the table are buttons for 'Turn on Subtotals' and 'PRINT'. The navigation sidebar and other page elements are identical to the previous screenshot.

How to View Invoices *(cont'd)*

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

Dashboard

Applications

- Application Search
- Submit Application
- Current Rates

Lease Transaction Center

- Active Customer Search
- Asset Search

My Account

- My Account
- Dealer Metrics
- Portfolio Report

Change Dealer

Contract Detail

INVOICES ASSETS BUYOUT XLS PRINT

[View Customer Detail page](#)

Customer: ABC Customer
Contract: 000-1234567-000

Contact Name: Joe Smith
Contact Phone: 555-555-5555
Fax:
Email: joe@abcompany.com

Equipment Information:

Equipment: Xerox Copier
Model: 3cq9203

Contract Information:

Contract: 000-1234567-000
Lease Start Date: 03/28/2014
Term: 60
Term Date: 05/01/2019
Monthly Payments: \$948.00
Misc. Due: 168.59

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

Dashboard

Applications

- Application Search
- Submit Application
- Current Rates

Lease Transaction Center

- Active Customer Search
- Asset Search

My Account

- My Account
- Dealer Metrics
- Portfolio Report

Change Dealer

Invoice List

INVOICES ASSETS BUYOUT XLS PRINT

Customer: ABC Customer **Date:** 11/21/17
DBA:
Contract: 000-1234567-000

Total Asset Cost: \$45,884.93

Invoices Turn on Subtotals [View Contract Detail page](#) [View Customer Detail page](#)

Invoice #	Date Due	Service Fee	Other	Service	Other Rec'd	Total Rec'd	Total Due	
		Invoiced	Invoiced	Fee Rec'd				
15361857	11/01/2017	\$168.59	\$948.00	\$168.59	\$948.00	\$1,116.59	\$0.00	VIEW INVOICE
15274919	10/01/2017	\$168.59	\$1,090.20	\$168.59	\$1,090.20	\$1,258.79	\$0.00	VIEW INVOICE
15196994	09/01/2017	\$168.59	\$948.00	\$168.59	\$948.00	\$1,116.59	\$0.00	VIEW INVOICE
15119979	08/01/2017	\$168.59	\$948.00	\$168.59	\$948.00	\$1,116.59	\$0.00	VIEW INVOICE
15043615	07/01/2017	\$168.59	\$948.00	\$168.59	\$948.00	\$1,116.59	\$0.00	VIEW INVOICE
14966093	06/01/2017	\$168.59	\$948.00	\$168.59	\$948.00	\$1,116.59	\$0.00	VIEW INVOICE
14891176	05/01/2017	\$168.59	\$948.00	\$168.59	\$948.00	\$1,116.59	\$0.00	VIEW INVOICE
14816746	04/01/2017	\$150.53	\$948.00	\$150.53	\$948.00	\$1,098.53	\$0.00	VIEW INVOICE
14740667	03/01/2017	\$150.53	\$948.00	\$150.53	\$948.00	\$1,098.53	\$0.00	VIEW INVOICE
14668680	02/01/2017	\$150.53	\$981.66	\$150.53	\$948.00	\$1,132.19	\$0.00	VIEW INVOICE

Charges and Payments are tracked to the first Invoice that the charge appeared on.

◀ Page 1 of 5 ▶

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:	<input type="text"/>
User Login ID:	<input type="text"/>
User Dealer ID:	Super Test Vendor ▾
User First Name:	<input type="text"/>
User Middle Name:	<input type="text"/>
User Last Name:	<input type="text"/>
User Address Line 1:	<input type="text"/>
User Address Line 2:	<input type="text"/>
User City:	<input type="text"/>
User State:	<input type="text"/>
User Zipcode:	<input type="text"/>
User Email:	<input type="text"/>
User Office Phone:	<input type="text"/>
User Mobile Phone:	<input type="text"/>

Account Status: 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

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)*

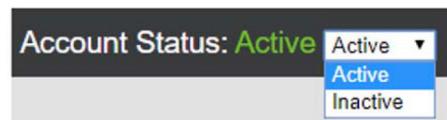
• MarlinNet Password Callouts:

- 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.



Existing User Report

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

Receive Notification?
Should this User receive Application Notification?

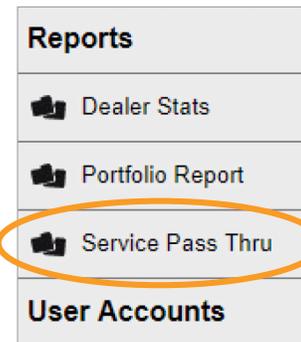
How to Pinpoint Service Pass Thru's

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.



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

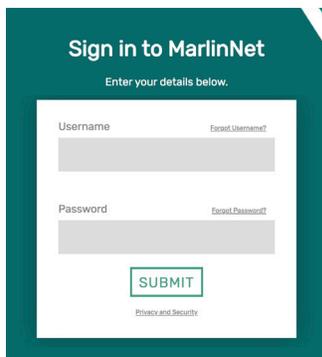
Service Fee Collected

Dealer:

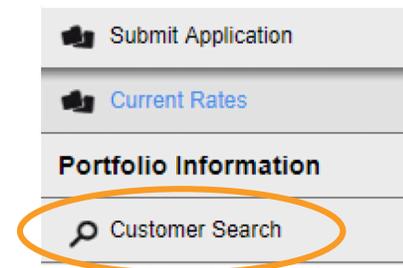
Customer Name	DBA Name	Marlin Check/ACH Number	Marlin Check/ACH Date	Contract Number	Coverage Period From	Coverage Period To	Billed \$	Paid \$	Customer Owes
		221065	09/11/2017		08/01/2017	09/01/2017	\$43.34	\$43.34	\$0.00
		225538	10/11/2017		09/01/2017	10/01/2017	\$43.34	\$43.34	\$0.00
		229765	11/15/2017		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

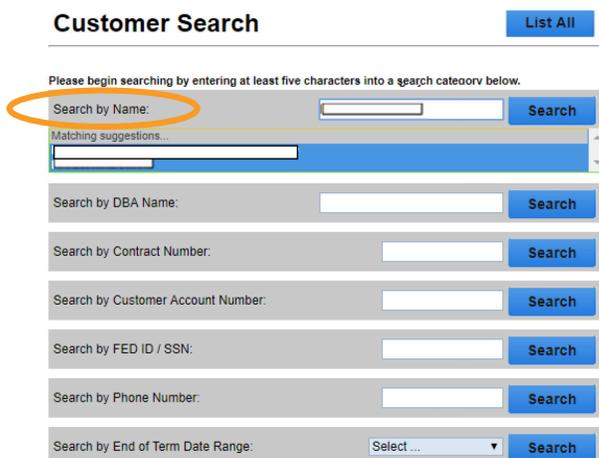
1. Log in to your MarlinNet account:
www.marlinnet.net



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.



Customer Name	DBA Name	Phone #	FED ID/SSN	Able to View	Last Dealer	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Yes	<input type="text"/>	Submit App
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Yes	<input type="text"/>	Submit App

How to Review Buyout Details & Complete Tradeup Quoting *(cont'd)*

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

Customer Detail .XLS PRINT

Customer CR Account:1344606

Customer Name/Address:

Contact Name:
 Contact Phone:
 Last Contact:
 Fax:
 Email: LFS@fio

Customer Summary Information:
 Application Detail:
 Number of Contracts:
 Contract Balance:
 Current Invoiced:
 Past Due 01-30:
 Past Due 31-60:
 Past Due 61-90:
 Past Due Over 90:
 Tax:
 Late Charges:
 Miscellaneous:
 Total Amount Due:
 Total Amount Past Due:

Open Contracts Turn on Subtotals PRINT

Contract Number	Contract Name	Asset Cost	Del. Cond.	Next Due Date	Total Due	Term Dt				
401-1344606-003	<input type="text"/>	<input type="text"/>	0	07/20/2018	0.00	04/20/2022	DETAILS	INVOICES	QUOTES	ASSETS
401-1344606-004	<input type="text"/>	<input type="text"/>	0	07/20/2018	0.00	04/20/2022	DETAILS	INVOICES	QUOTES	ASSETS

- 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!

Buyout/Tradeup INVOICES ASSETS QUOTES

Customer:
 Contract:

Equipment: Sharp Copier
 Remaining Payments: 46
 Term: 60
 Lease Payment: \$547.00
 Service Pass Through Payment: \$0.00
 Total Payment: \$547.00

Commencement Date: 04/20/2017
 Purchase Option: FMV
 Equipment Cost: \$29,728.26
 Quote Date: 06/25/2018
 Next Payment Due Date: 07/20/2018

	Buyout	Trade Up(Keep)	Trade Up(Return)
Receivable Balance	\$25,162.00	\$25,162.00	\$25,162.00
Residual	\$5,945.65	\$2,378.26	\$0.00
Sales Tax	\$1,866.46	\$0.00	\$0.00
Total Buyout	\$33,568.68	\$28,134.83	\$25,756.57

Create Tradeup (Keep) Application Create Tradeup (Return) Application

Buyout/Tradeup generated on 06/25/18 for contract number 401-1344606-003
 Quotes are valid for 30 days .XLS PRINT