



leaserep

VENDOR HANDBOOK

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# 1

## LEASEREP OVERVIEW

- Introduction
- Features

# INTRODUCTION

Leaserep is an online quoting tool that grants your customer the flexibility to offer a low monthly payment right from your website.



# FEATURES

## Branded Online Quoter

A vendor may add their logo to their quoter and application.



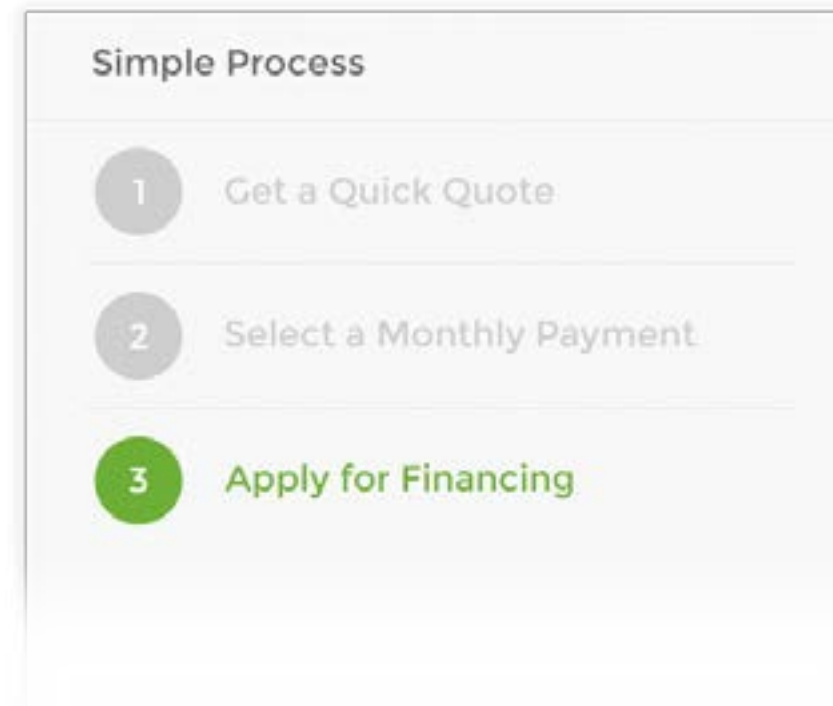
## Unique URL

Online quoter is branded with company name web address.



## Professional Quote Letters

Every quote can be generated as a branded pdf.



## Easy Application Flow

After generating a quote, an application can be completed with the minimum amount of information needed to be run by credit.

# FEATURES

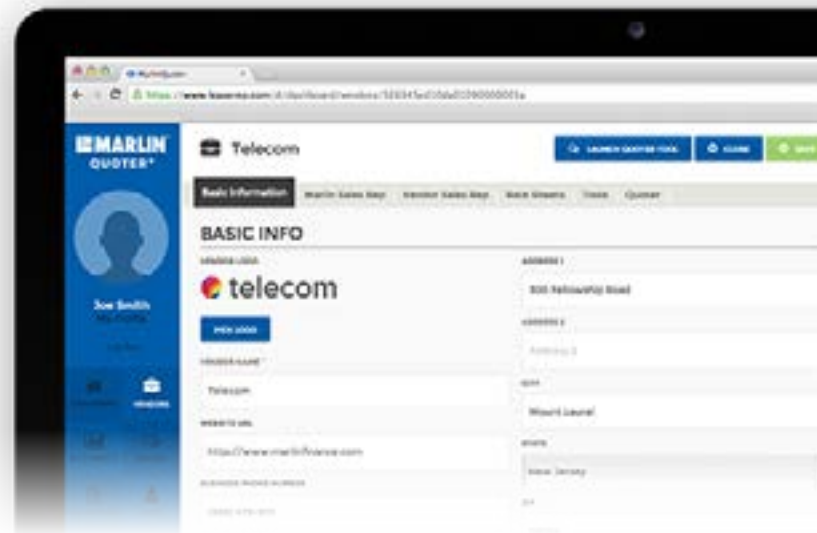
## Application Program Interface (API)

A vendor can request access to integrate Leaserep into their website.



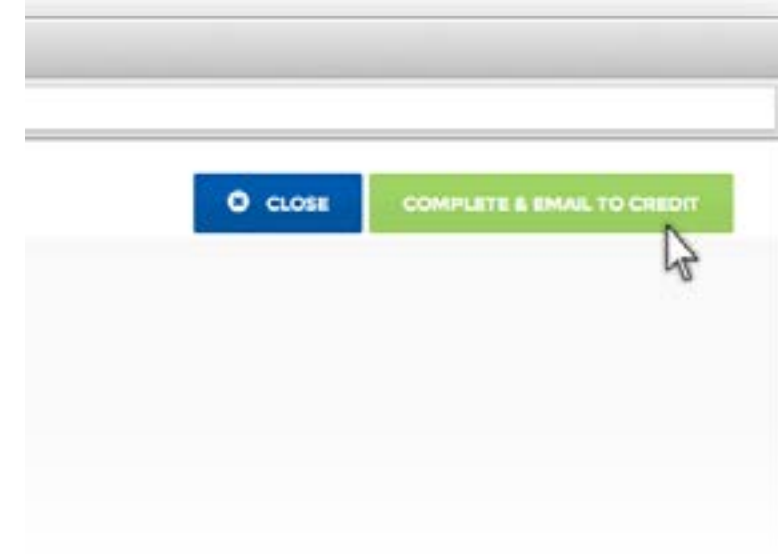
## Leaserep Admin Panel

You and your vendor can login and manage all of your quotes and applications.



## Email Notifications

Every quote and application completed sends an email to you and your vendor.



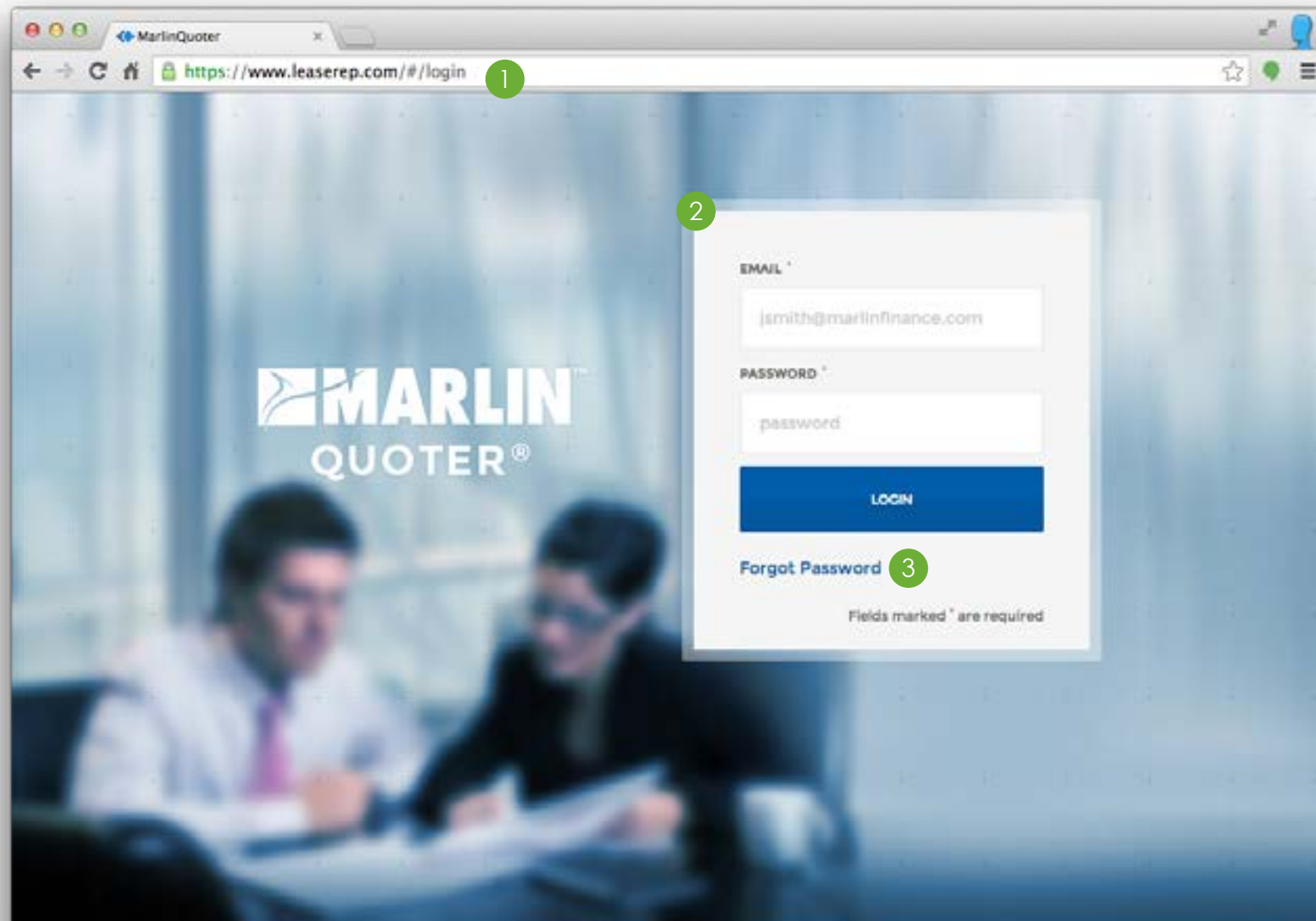
## Submit To Credit

After reviewing an application just simply click 'COMPLETE & EMAIL TO CREDIT' and credit receives exactly what they need to make a credit decision.

# 2

## ADMIN SCREENS EXPLAINED

# LOGIN SCREEN



1. **Login URL** - <https://www.leaseq.com/#/login>
2. **Login Box** - Just enter your email and password.
3. **Forgot Password** - Click and enter your email to reset your password.

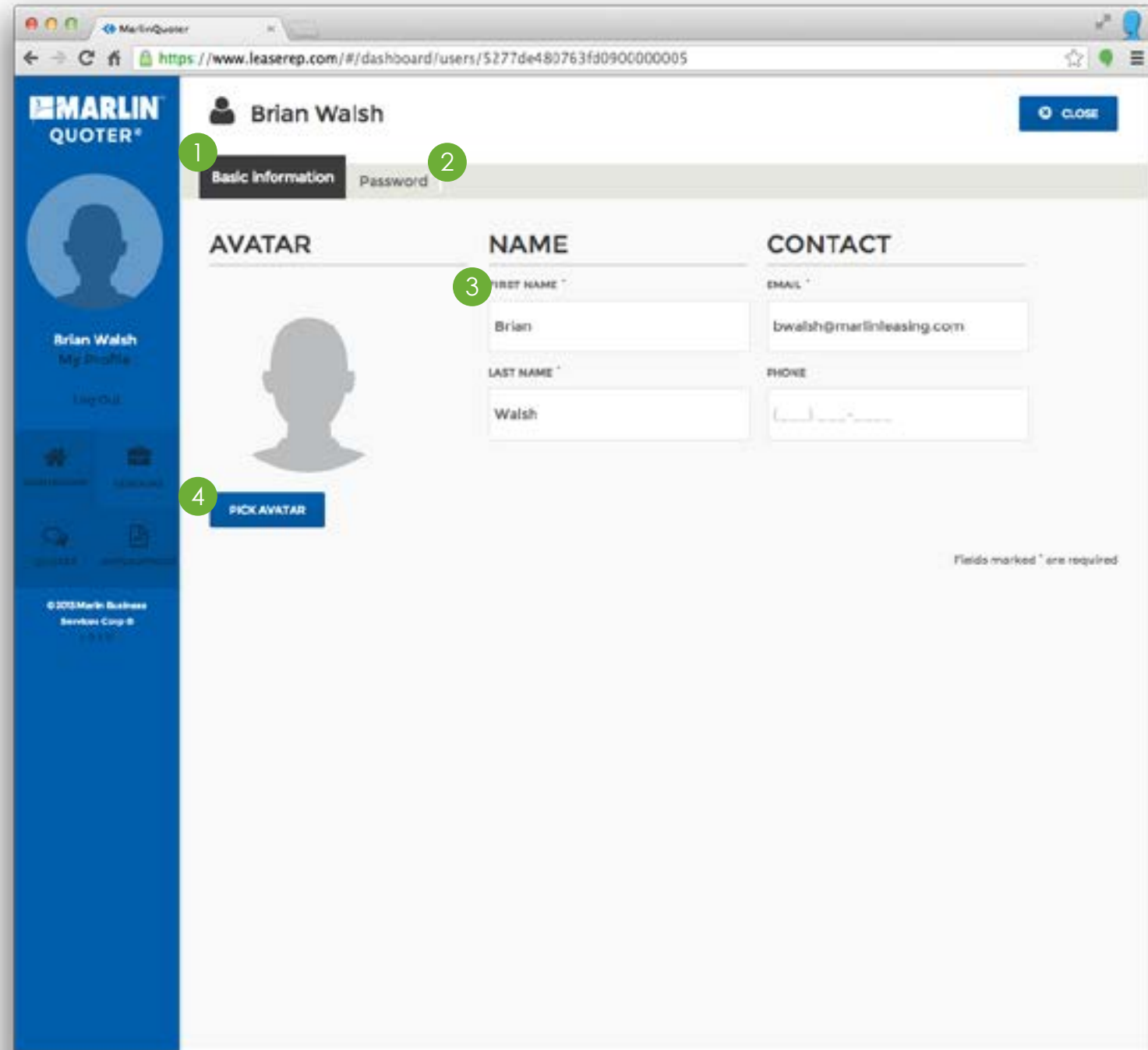


# DASHBOARD

The screenshot shows the Marlin Quoter dashboard interface. At the top left, there is a header with the Marlin Quoter logo (1) and a profile card for the user's Marlin sales representative (2). The profile card includes a profile photo (2) and contact information: 'YOUR MARLIN SALES REP', 'Marlin Rep Name', 'email@marlinfinance.com', and '8884799111'. Below the header, there are two main sections: 'New Applications' (3) and 'Open Applications' (4). The 'New Applications' section contains a list of applications with details such as 'NEW BILL', '\$12,333.00', '18 DAYS AGO', 'bill@facultycreative.com', and 'My Company / Faculty Creative'. The 'Open Applications' section contains a list of applications with details such as 'IN PROGRESS MR. CREATIVE', '\$3,000.12', '19 DAYS AGO', 'matt@facultycreative.com', and 'Old School Inc. / Faculty Creative'. On the left side of the dashboard, there is a navigation menu (6) with items like 'telecom', 'Marlin Vendor', 'My Profile', 'Vendor Profile', 'DASHBOARD', and 'Logout'. A company logo (5) is also visible in the navigation menu. At the bottom of the navigation menu, there is a 'Log Out' link (7).

1. **Your Marlin Representative** - Your Marlin Rep's contact information.
2. **Profile Photo** - A professional photo that will be viewed by you and your Marlin Rep.
3. **New Applications** - These are applications that have not been viewed by you and your Marlin Rep.
4. **Open Applications** - These are applications that you have not sent to credit yet.
5. **Company Logo** - Your company logo that is visible to your customers.
6. **Profile Links** - Edit your contact information, password and upload a profile photo by clicking the 'My Profile' link. Edit your company's information by clicking the 'Vendor Profile' link.
7. **Log Out** - Click here to log out of Leaserep.
8. **System Navigation** - Use this navigation to get to the dashboard, all of your quotes and applications.

# PROFILE



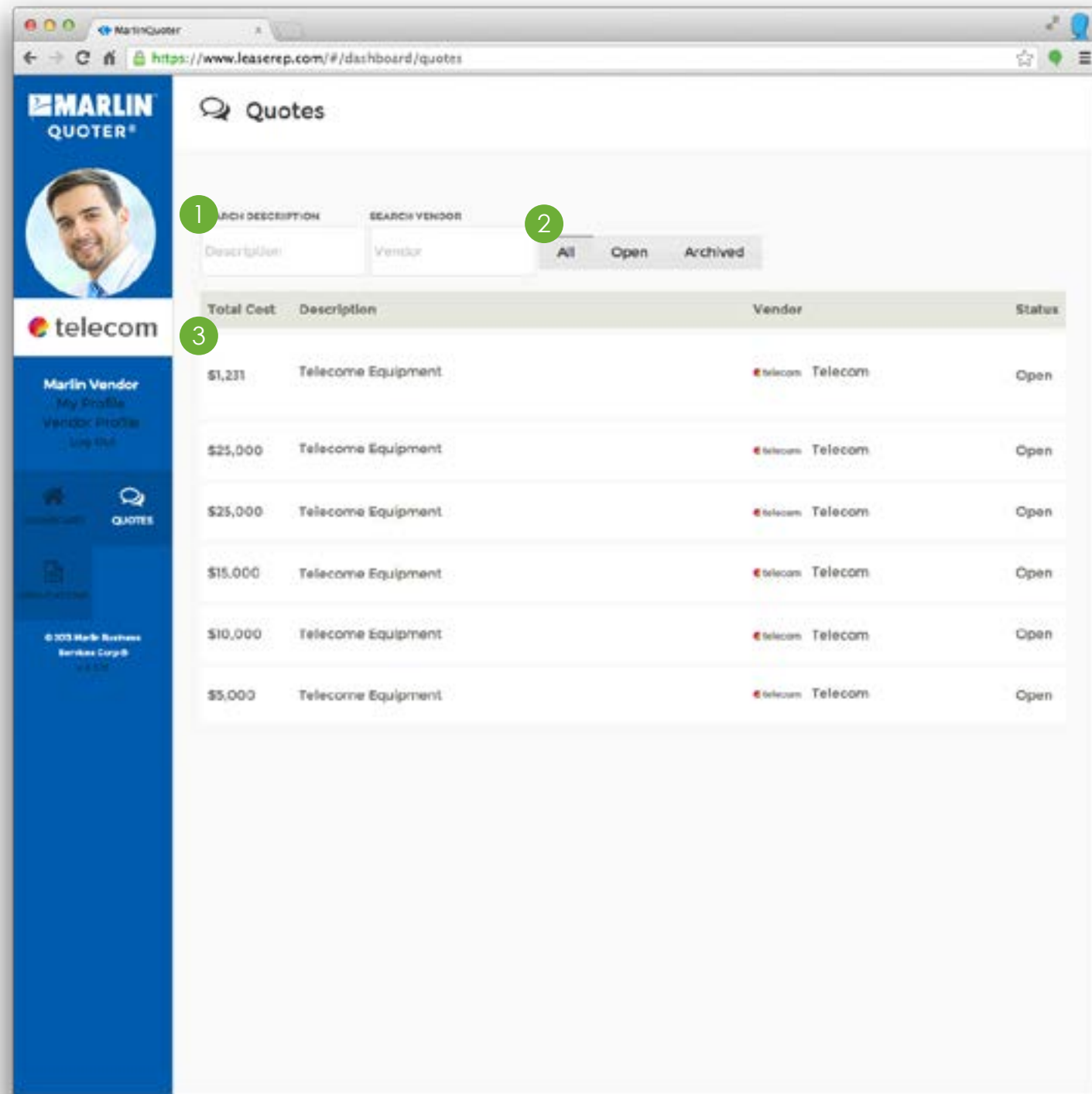
1. **Basic Information** - Edit your contact information and upload a profile photo from this tab.
2. **Password** - Change your password from this tab.
3. **Name & Contact** - This information will be seen by all of the vendors assigned to you.
4. **Pick Avatar** - Push this button to upload a professional profile photo for your vendors to see.

# VENDOR PROFILE

The screenshot shows a web browser window with the URL <https://www.leaserep.com/#/dashboard/vendors/526545cd10da01090000001a>. The page title is 'Telecom'. In the top right corner, there are two buttons: 'LAUNCH QUOTER TOOL' (marked with a green circle 1) and 'CLOSE'. On the left side, there is a sidebar with the Marlin Quoter logo and a 'Pick Logo' button (marked with a green circle 3). The main content area is titled 'Basic Information' (marked with a green circle 2) and 'BASIC INFO'. It contains several input fields: 'VENDOR LOGO' (with the telecom logo), 'ADDRESS 1' (400 Bell Ave.), 'ADDRESS 2' (Address 2), 'CITY' (New York), 'STATE' (New York), 'ZIP' (55555), 'VENDOR NAME \*' (Telecom), 'WEBSITE URL' (http://www.telecom.com), and 'BUSINESS PHONE NUMBER' ((888) 555-5555). Below this is the 'PRIMARY CONTACT' section (marked with a green circle 4) with fields for 'NAME' (Joe Smith), 'EMAIL' (jsmith@telecom.com), and 'PHONE' ((888) 555-5555). A footer note states 'Fields marked \* are required'.

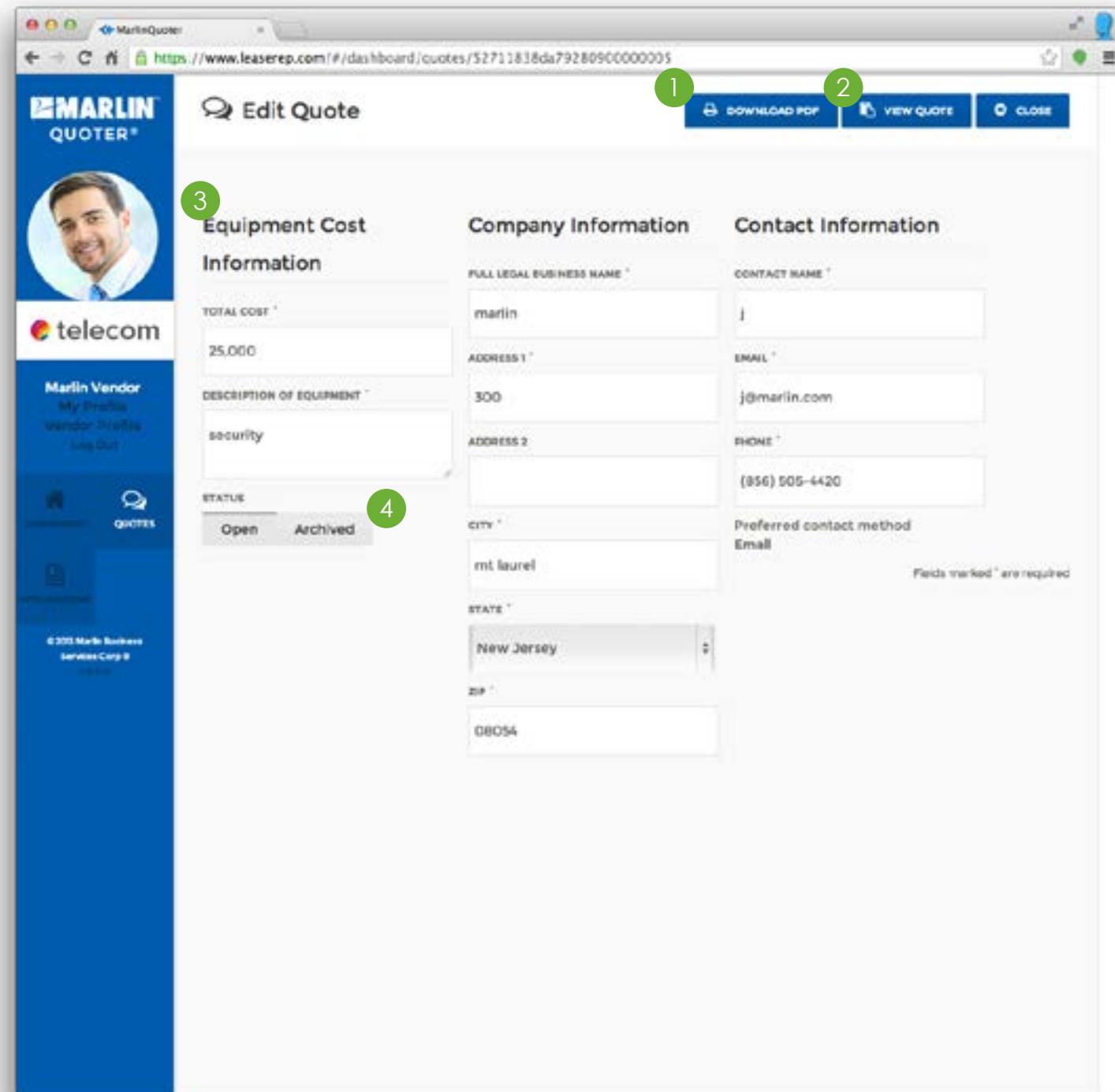
1. **Launch Quoter Tool** - Click here to open your quoter tool.
2. **Basic Information** - Change your company information from this screen.
3. **Company Logo** - Click 'Pick Logo' to change your company logo.
4. **Primary Contact** - This contact will be the name and information displayed on the proposal letter.

# QUOTES



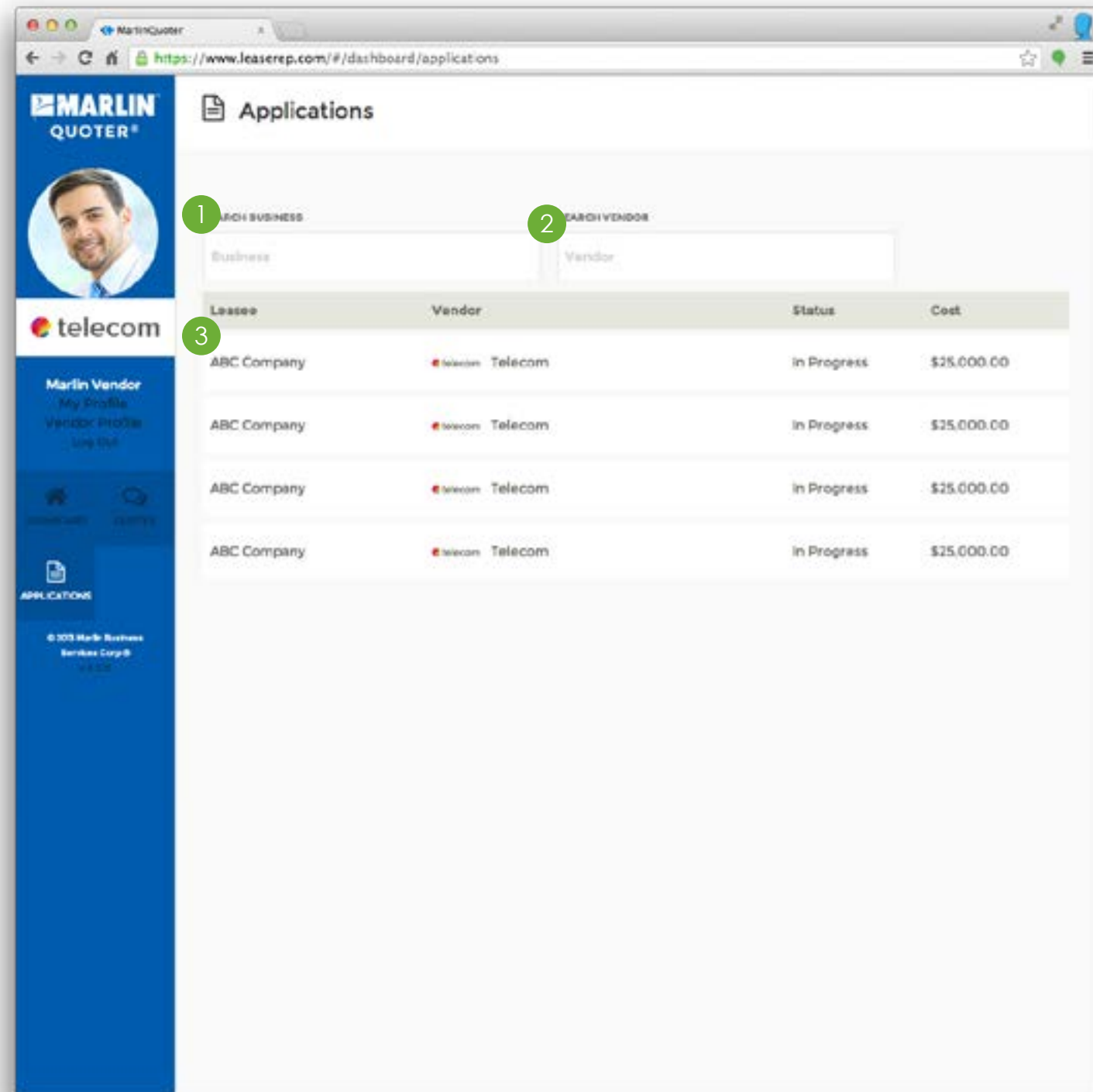
- 1. Search Description & Search Vendor** - Type anything into these fields to locate the quote you are looking for.
- 2. All/Open/Archived** - You can mark a quote open or archived. Using these buttons you can filter the quotes based on status.
- 3. Quotes** - These are the quotes that have been generated on your quoter.

# SINGLE QUOTE



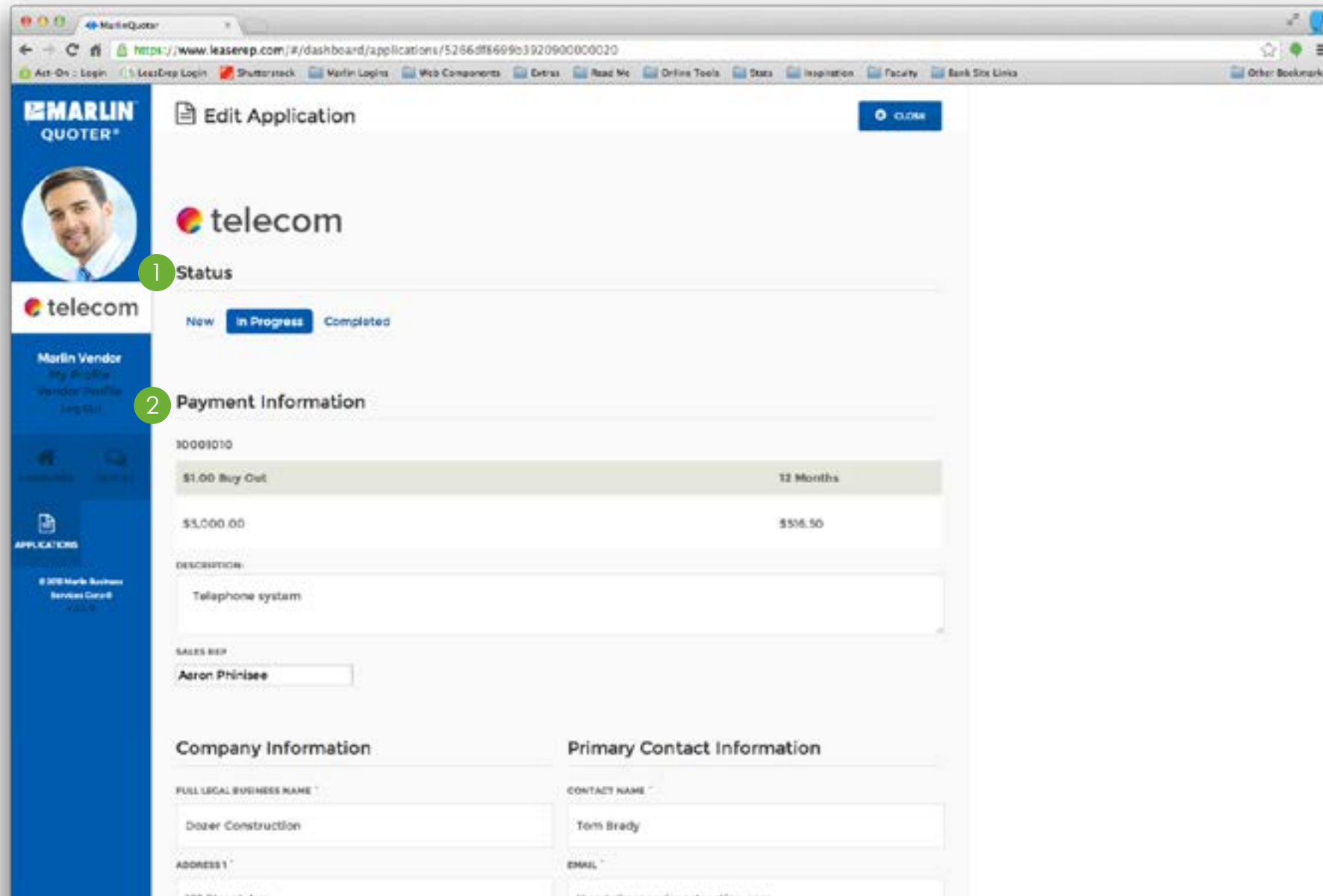
1. **Download PDF** - Click to download the proposal letter of the quote.
2. **View Quote** - Click to view your customer's view of the quote.
3. **Quote Details** - These are the details of the quote. You have the ability to edit and save the details if needed.
4. **Status** - You can archive the quote if it is no longer active.

# APPLICATIONS



1. **Search Company** - Search for applications based by the customer's company name.
2. **Search Vendor** - Search for the applications based by your companies setup on Leaserep.
3. **Applications** - These are the applications that have been generated by your customers.

# SINGLE APPLICATION



1. **Status** - Status refers to the status of the application inside of Leaserep. You can not change this manually. Once you have sent it to credit it changes to completed.
2. **Application Information** - You can review and edit information for the application.

# 3

## HOW TO'S

- GENERATE A QUOTE
- EDIT AN APPLICATION
- CHANGE COMPANY INFORMATION
- ADD LEASEREP TO A WEBSITE



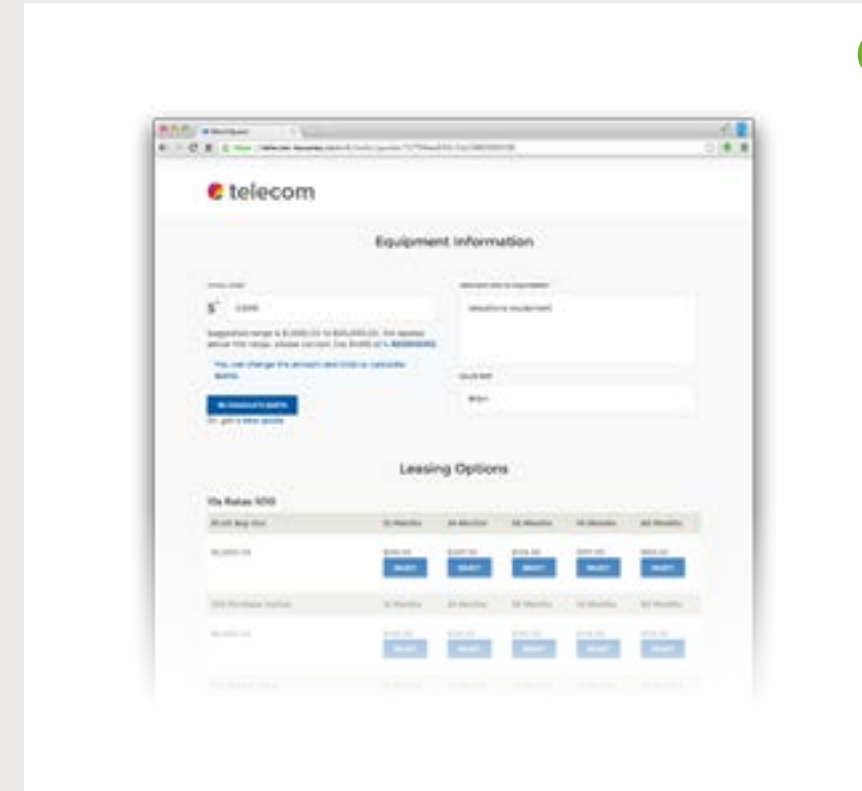
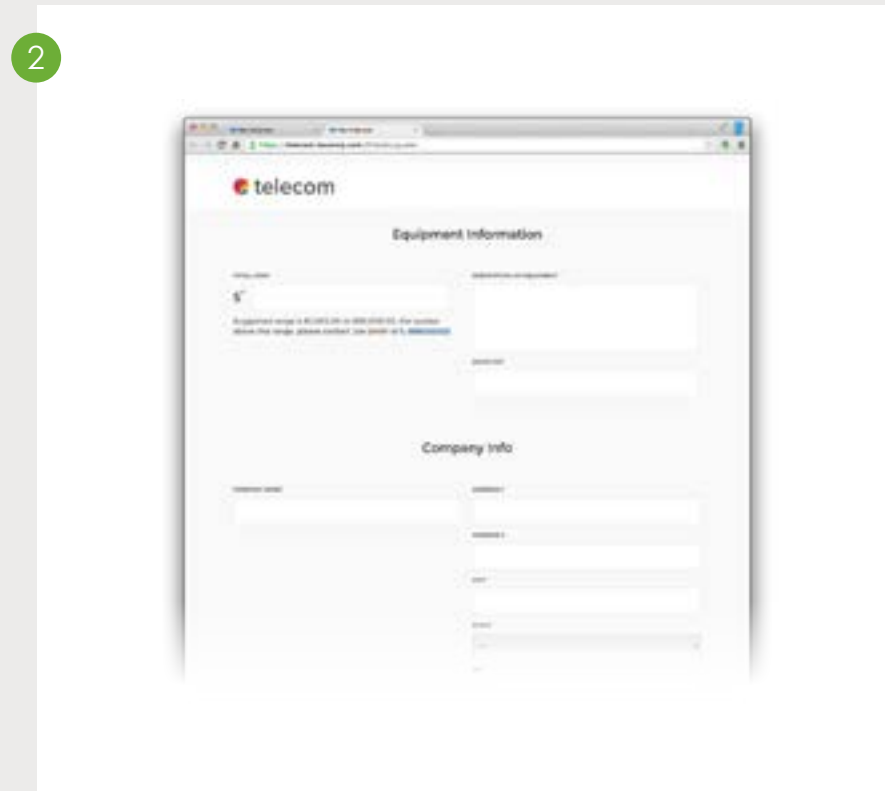
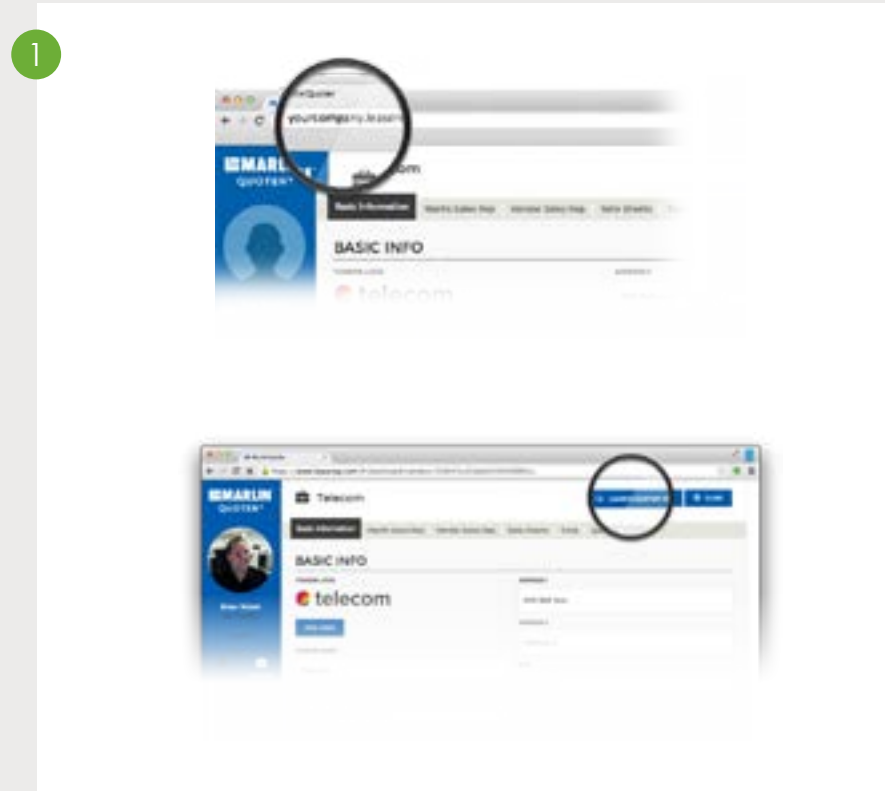
# GENERATE A QUOTE

To generate a quote you need to go onto your Leaserep. You can do this by two ways:

1. Typing in your Leaserep web address.

OR

2. Launch it from the 'Vendor Profile' screen by clicking the 'Launch Quoter Tool' button.

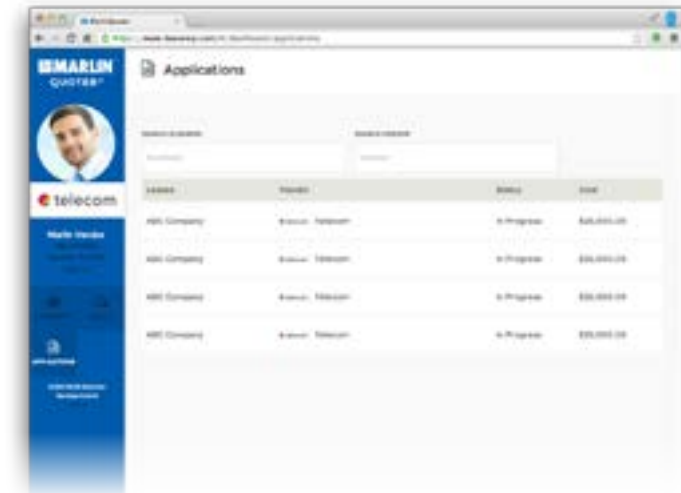


Once a quote is generated you can either select a monthly payment, download the proposal letter or share the quote's unique web address.

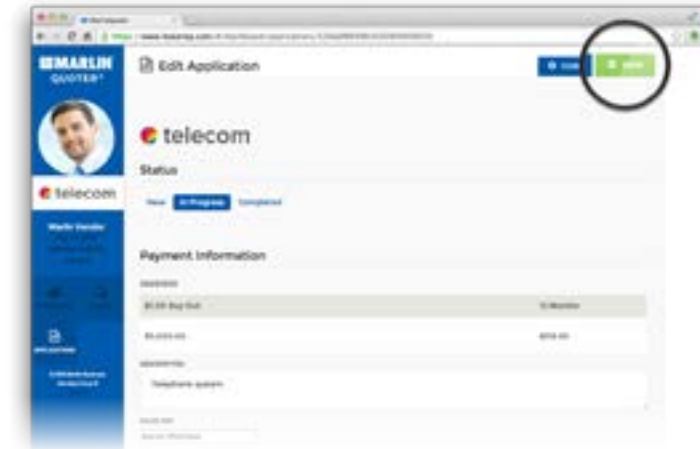
# EDIT AN APPLICATION

To edit an application you need to click on an application from either your dashboard or the applications section in Leaserep.

1



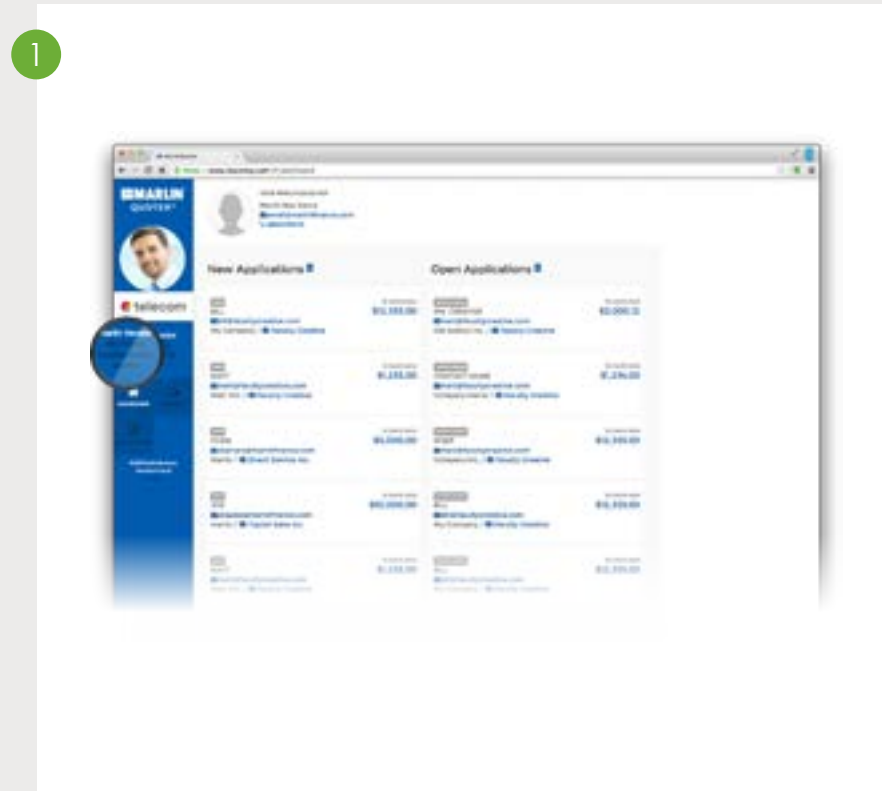
2



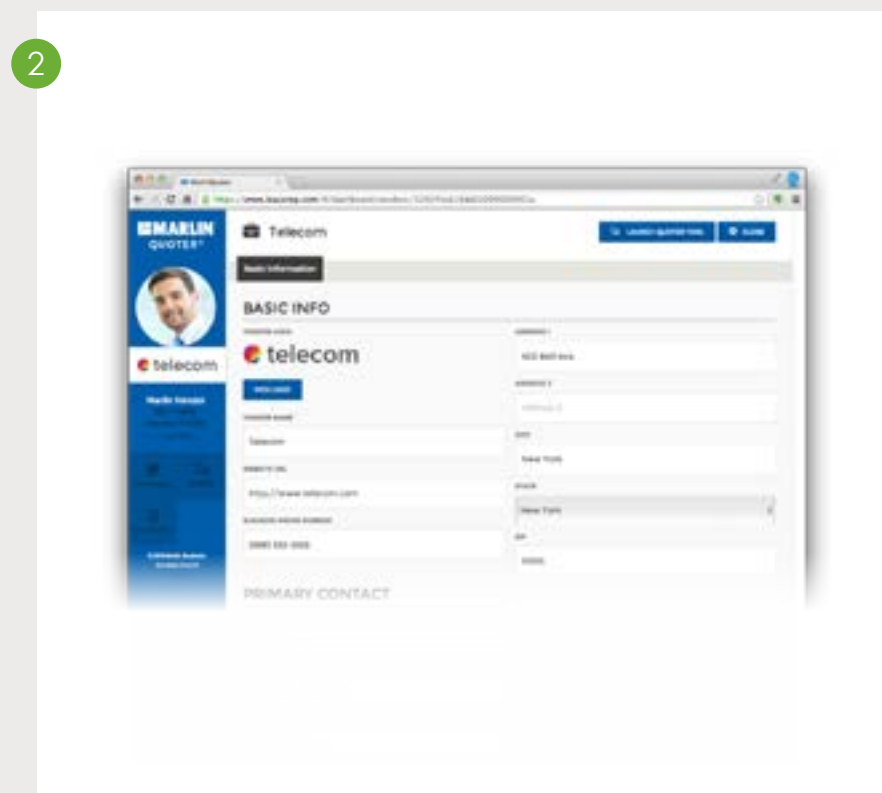
Once you open an application you can edit the information and click the 'Save' button.

# CHANGE COMPANY INFORMATION

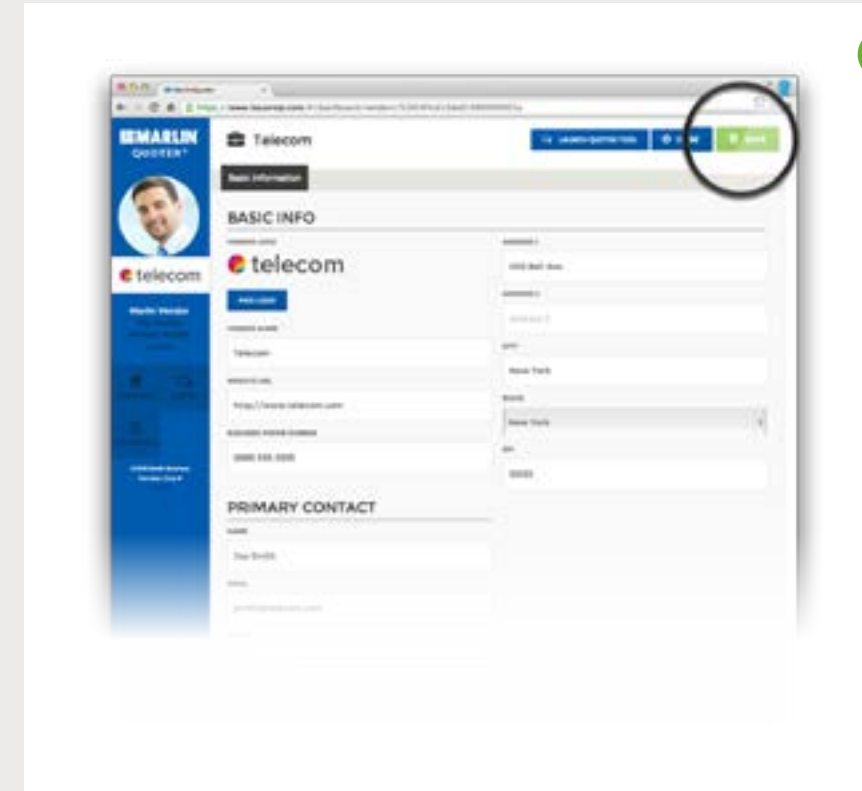
To change your company information you need to click on 'Vendor Profile' on the left.



Edit your company information and logo.



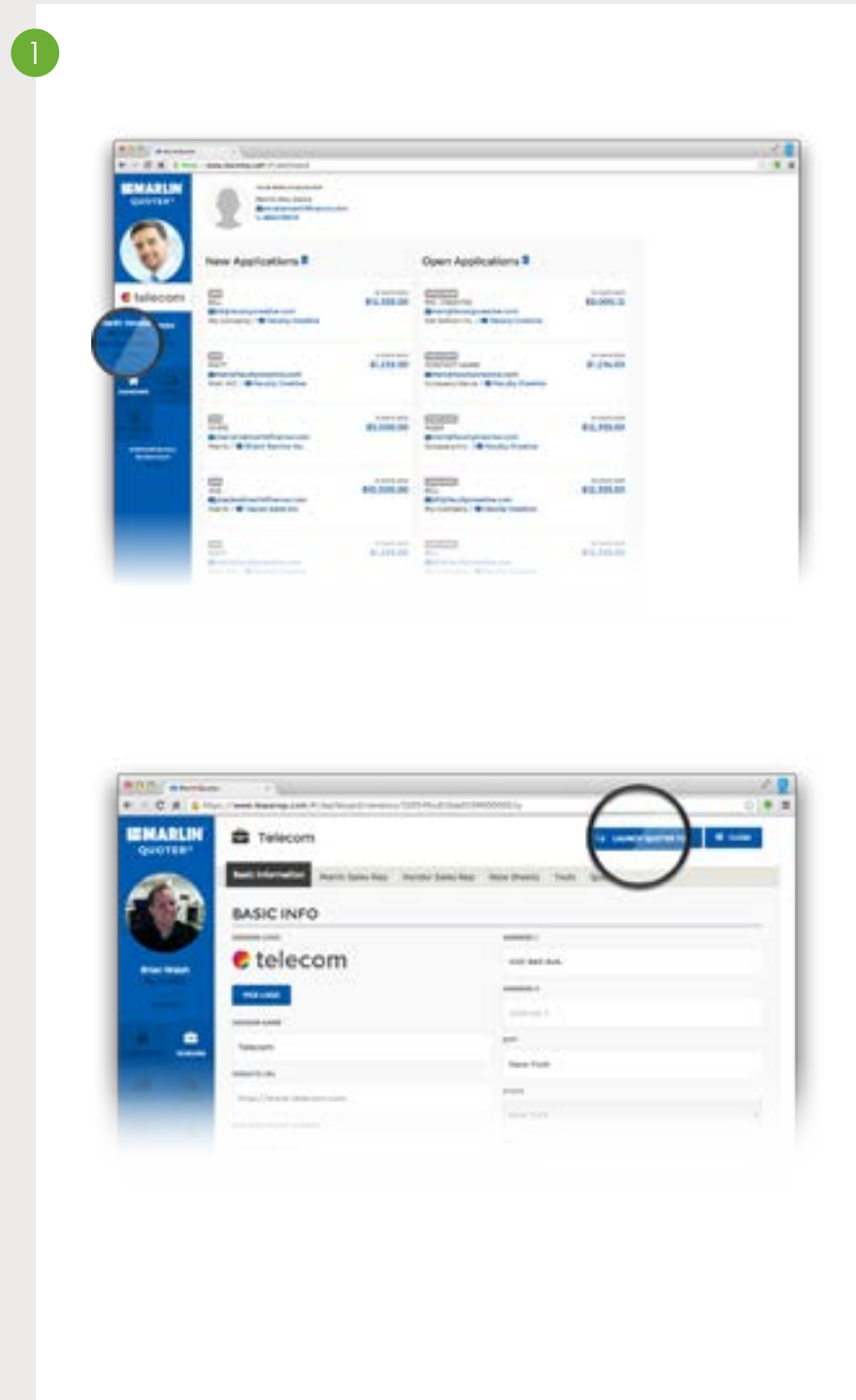
Click the 'Save' button.



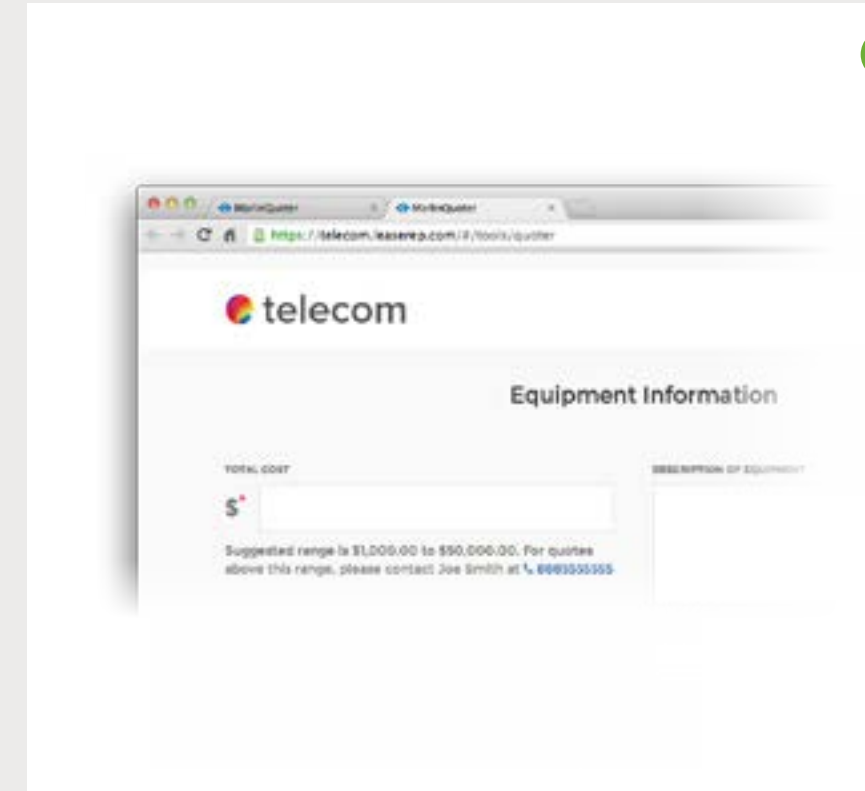
# ADD LEASEREP TO A WEBSITE

Your unique quoter can easily be added to your website. The information below is intended for your web master or IT department.

First you need to go to your unique quoter. Just click the 'Vendor Profile' link in the navigation and then the 'Launch Quoter Tool' button.



1



2

Copy the web address to your quoter and choose one of the four ways to add it to your website.

*The lines of code in step 3 have been split for readability in this document, however you should remove all line breaks prior to insertion on your website. And please, test the code immediately upon upload to make sure it is working properly.*

Follow the instructions and replace

```
https://your-company.leserep.com/#/tools/quoter
```

with the web address you copied in the previous step.

### 3 Text Link

To insert a simple text link ([Like This](#)) cut-n-paste the following code.

```
<a href="https://your-company.leserep.com/#/tools/quoter"
  title="Finance Calculator"
  target="_blank">
  Finance Calculator
</a>
```

### Use Your Own Image

If you have your own graphic that you would like used as a button, use this code and replace Your\_Image\_File.jpg with the complete web address and filename of the graphic you wish displayed. Cut-n-paste the following code.

```
<input type="image"
  name="Calc"
  title="Finance Calculator"
  onclick="javascript:
    window.open('https://your-company.
leserep.com/#/tools/quoter',
  'Calc');"
  src="http://www.yourdomain.com/path/to/your/
image/file/Your_Image_File.jpg"
/>
```

Your unique quoter can easily be added to your website. The information below is intended for your web master or IT department.

First you need to go to your unique quoter. Just click the 'Vendor Profile' link in the navigation and then the 'Launch Quoter Tool' button.

Copy the web address to your quoter and choose one of the three ways to add it to your website.

### Windows Button

For a standard grey Windows button ( ) cut-n-paste the following code.

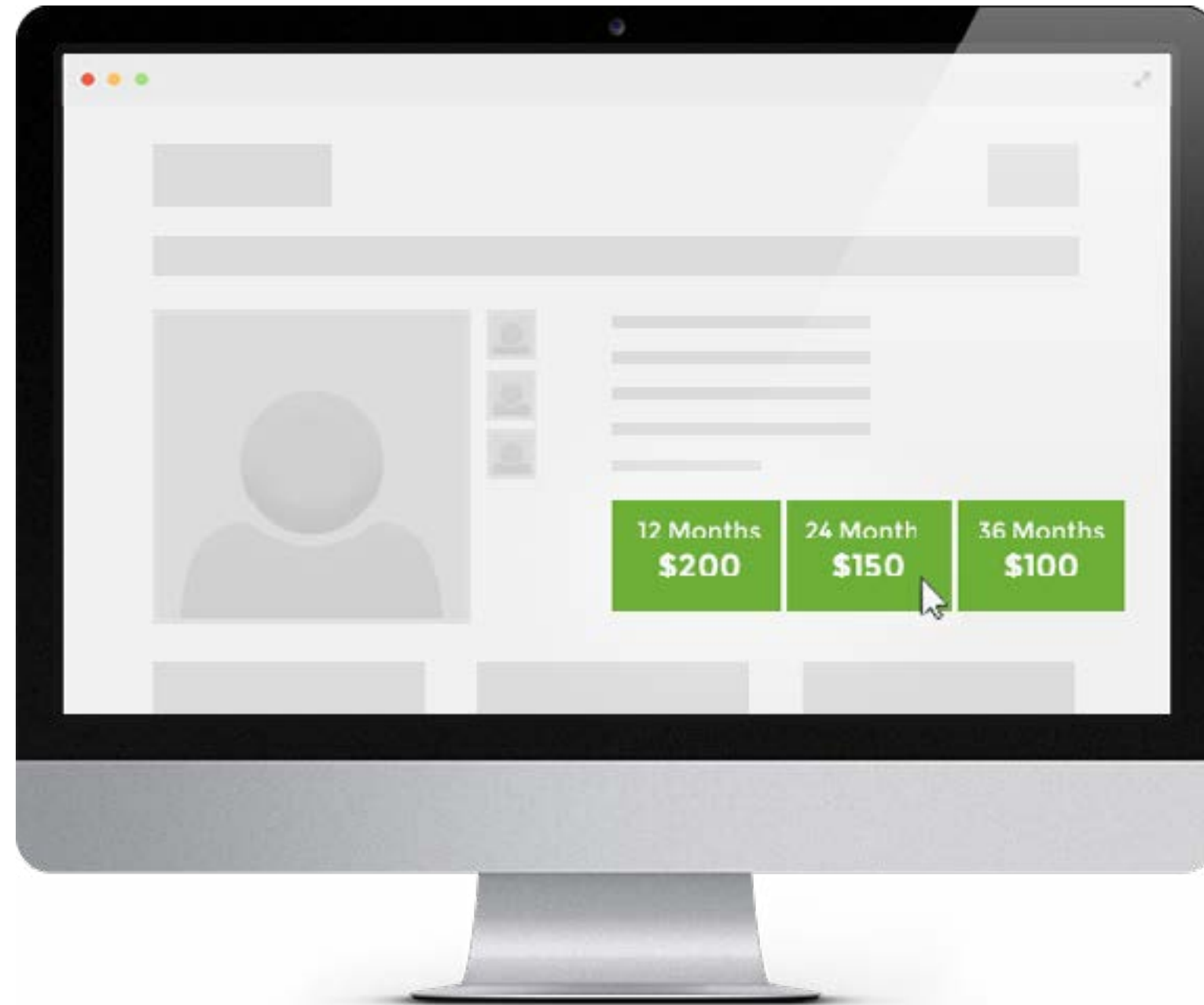
```
<input type="button"
  name="Calc"
  value="Finance Calculator"
  title="Finance Calculator"
  onclick="javascript:
    window.open('https://your-company.
leserep.com/#/tools/quoter',
  'Calc');"
/>
```

# 4

## API DOCUMENTATION

# INTRODUCTION

Participating vendors can generate quotes using the API. This allows the vendor to integrate financing options with their online shopping cart experience.



# AUTHENTICATION

## Request Access

The API requires a key for all requests. To sign up for a key, email your dedicated Marlin Rep requesting access.

## Rate Limit

The API is currently limited to 5 requests per minute. Please throttle accordingly.

# ACCESSING YOUR API KEY



1 To view your key, login to your Leaserep account and click 'Vendor Profile'.



2 Click on the 'API' tab at the top to view your API key.



# METHOD: GENERATE A QUOTE

Participating vendors can generate quotes using the API. This allows the vendor to integrate Marlin Finance options with their online shopping cart experience.

## Endpoint

POST /public\_api/v1/quotes

## Authentication

This request requires authentication. Add the following to your request header.

Marlin-API-Key: 'YOUR\_API\_KEY'

# PARAMETERS

The only required parameters are totalCost and description. Your vendor ID is determined automatically based on your API key.

**REQUIRED totalCost:** total cost of quote. If you include a decimal, you must have 2 decimal places, for example: 100.90 and not 100.9. Comas and dollar signs will be removed.

**REQUIRED description:** description of equipment to be leased.

**OPTIONAL company:** Company object containing information about requesting party. May be used to contact said party.

```
// Please note, you are responsible for ensuring the company object
// is in the correct format.
"company": {
  "businessAddress": {
    "zip": "String or Number", // 5 digit zip code
    "state": "String", // two character, all caps. ex: NJ
    "city": "String",
    "address2": "String",
    "address1": "String"
  },
  "contactPerson": { // primary contact for this company
    "contactMethod": "String", // must be one of "email" or "phone"
    "phone": "String or Number", // 10 digit format, no hyphens, ex:
6091112222
    "email": "String",
    "name": "String"
  },
  "fullLegalBusinessName": "String"
}
```

# RESPONSE FORMAT

Response will be JSON format. An example of a successful call is:

```
{
  'meta': {
    'code': 200 // code indicating success status
    'message': 'this is a message for you!' // message to developer, if any
  },
  "result": {
    "payments": [{ // payments, grouped by program
      programName: "Great Rate Program", // Program name
      options: {
        "rates": [{ // rates for this program based on buyout option
          "totalCostDisplay": "$50,001.00",
          "totalCost": 50001,
          "paymentDisplay": "$4,095.08",
          "payment": 4095.08,
          "term": "12 Months"
        },
        {
          "totalCostDisplay": "$50,001.00",
          "totalCost": 50001,
          "paymentDisplay": "$2,145.04",
          "payment": 2145.0429,
          "term": "24 Months"
        }
      ]
    }
  ]
}
```

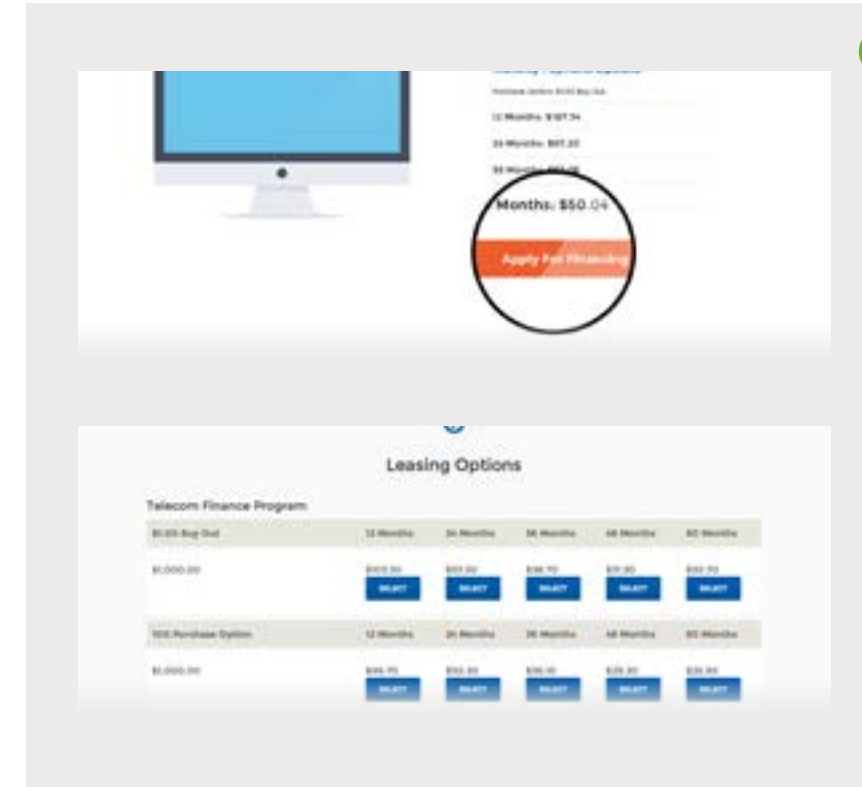
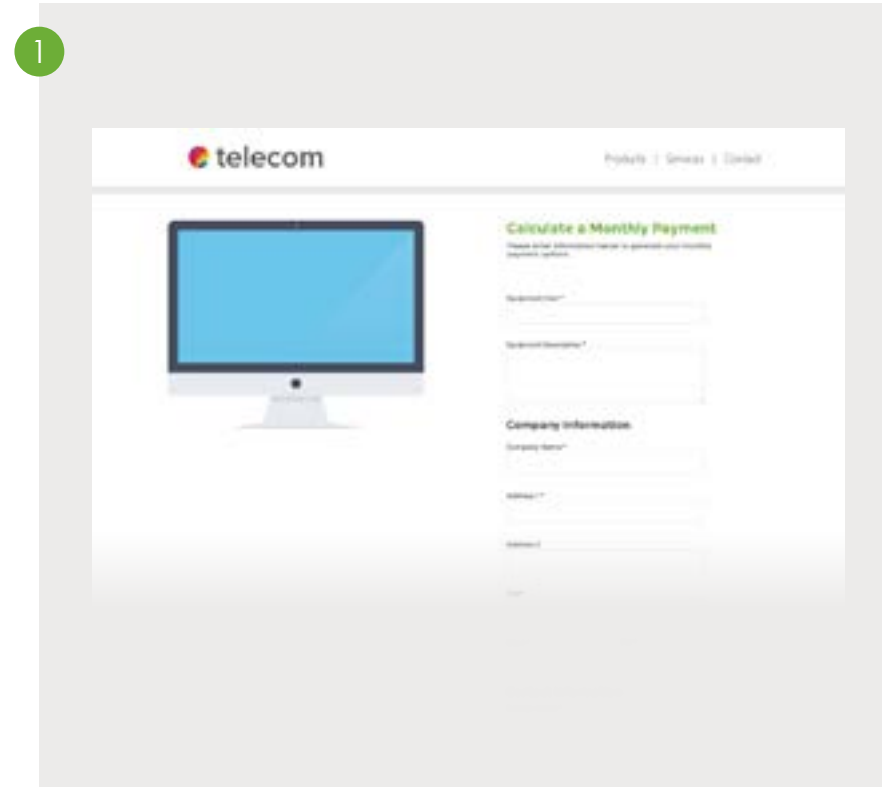
An failed response will look like this:

```
{
  'meta': {
    'code': 500 // code, typically the same as http status code
    'message': 'this is a message for you!' // message to developer, if any
  }
}
```

# API EXAMPLE

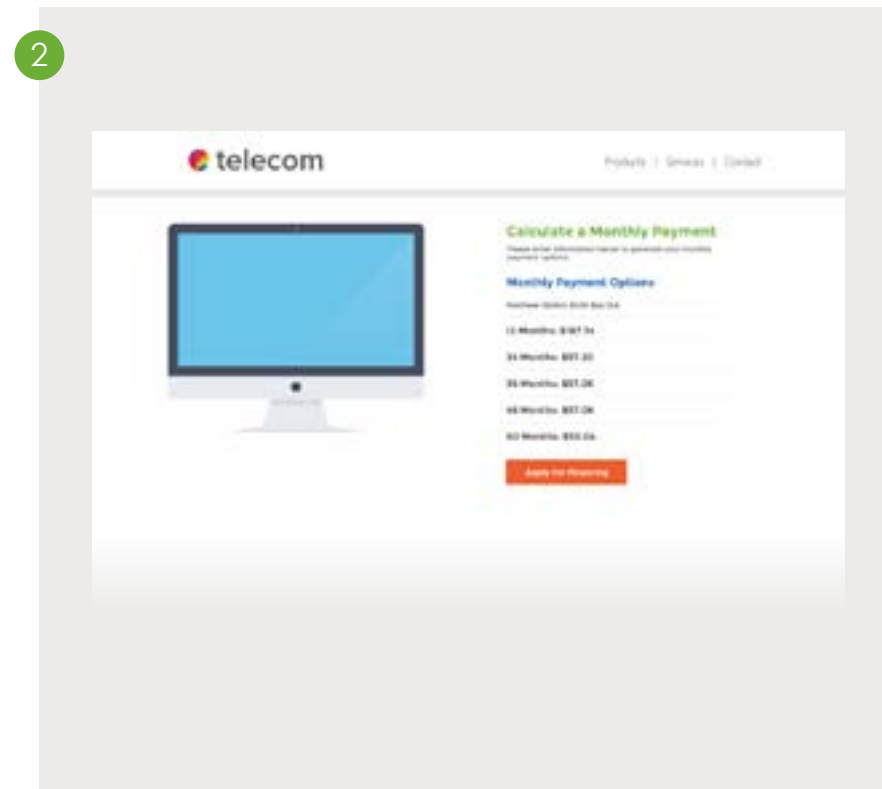
Here is one example of how it could function.

Integrate the form into your website.



Offer the customer to 'Apply For Financing' and bring them into the unique quote url to select a monthly payment option.

Post the quotes after the submission of information.



Once the customer selects a monthly payment they can complete the application and a notification goes to you and your Marlin Representative.