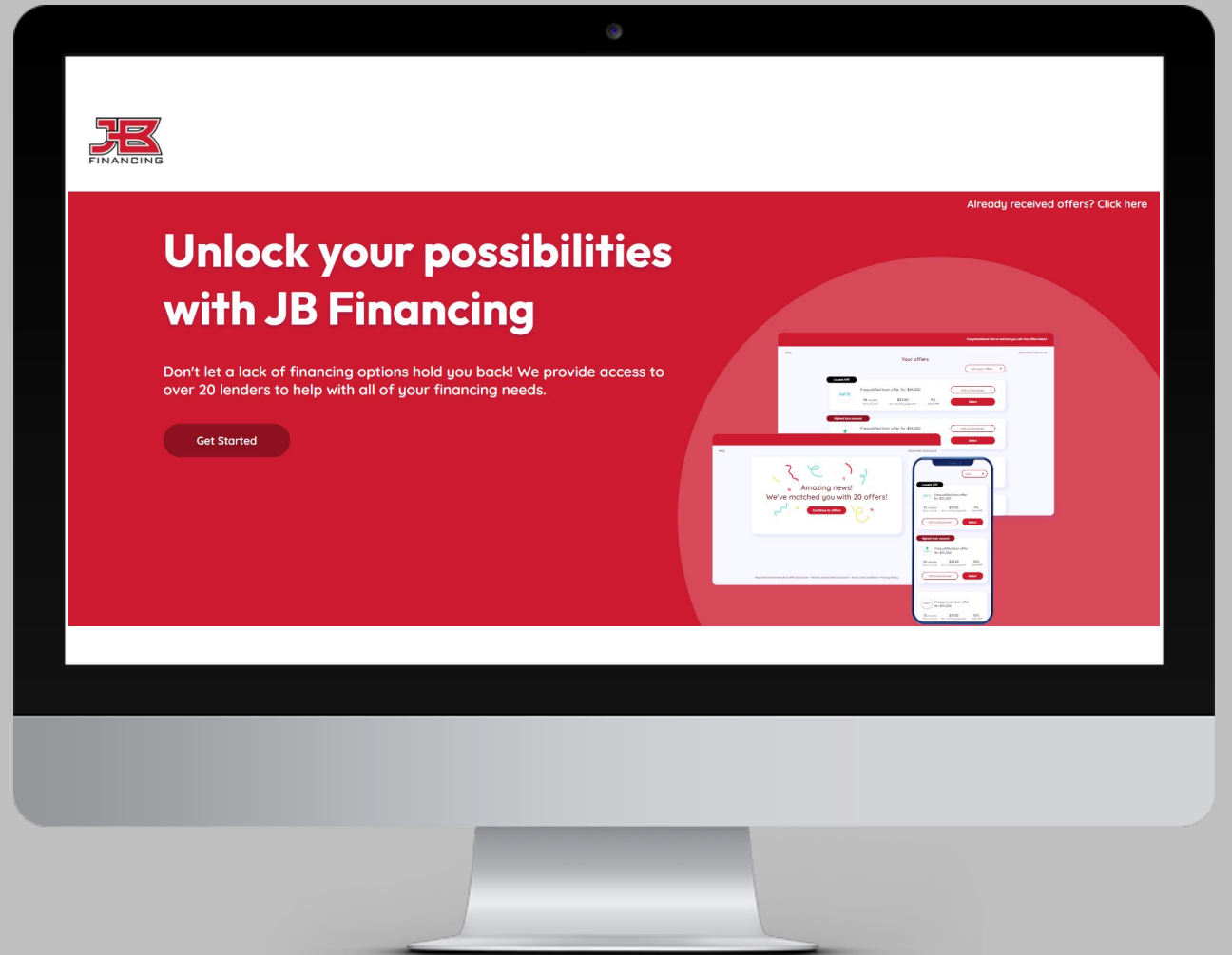




Financing Portal Guide

Merchant Setup and Portal Overview

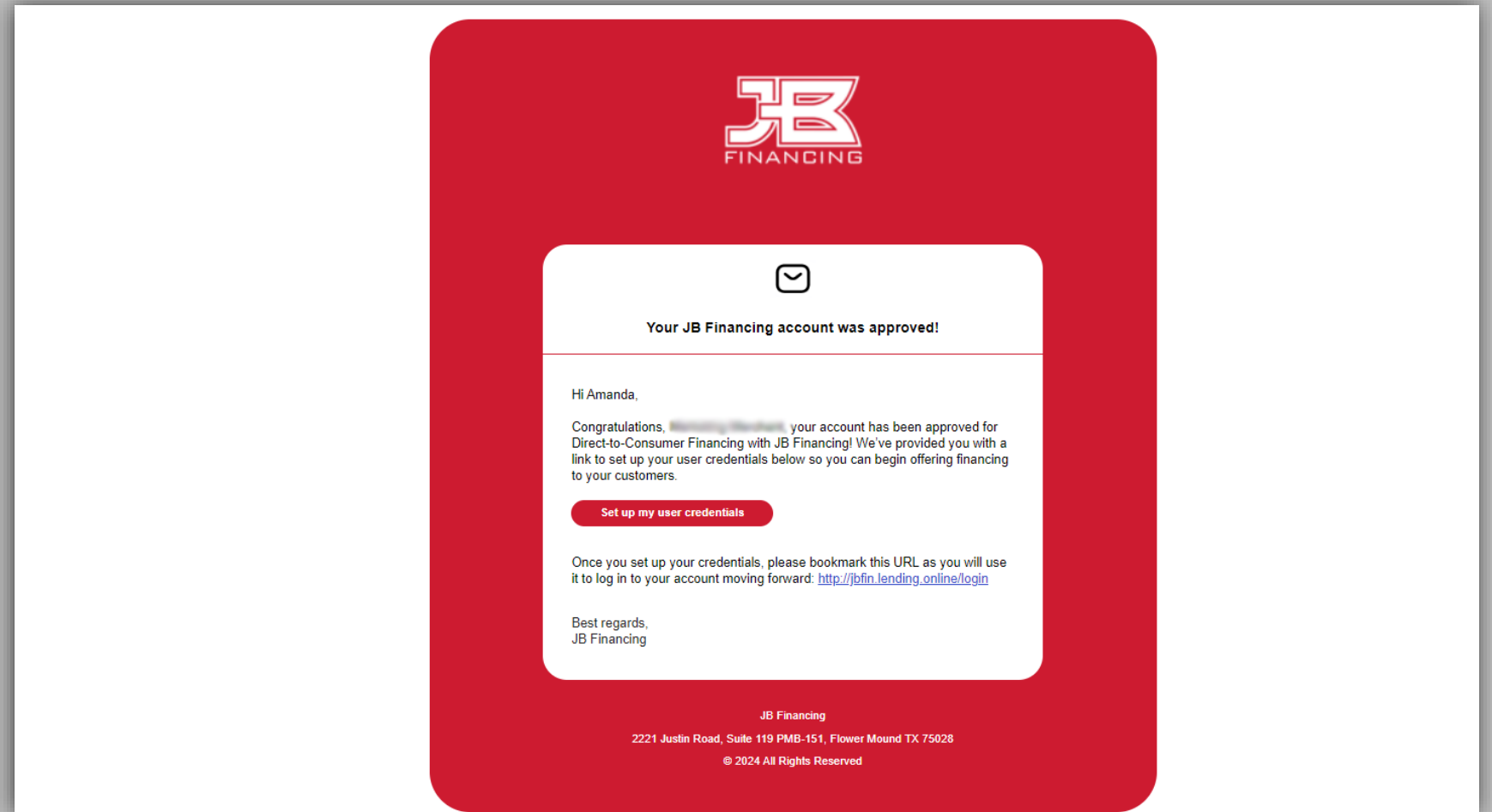


User Invitation

When you receive the email confirming your business **account was approved**, click **“Set up my user credentials”** to create login information for accessing the financing portal.

The link to your login page will also be provided. Be sure to save this.

*Look for email from merchant-services@lending.online



User Credentials

Set up your credentials that you will use to log in to the portal going forward.

You will reach a success page confirming your user credentials have been created.



The image shows a screenshot of a web form titled "Create your user account". The form is set against a white background with a red header bar at the top. It contains several input fields and a list of requirements:

- First name**: A text input field with a red border and a red error message below it: "This is a required field".
- Last name**: A text input field with a red border and a red error message below it: "This is a required field".
- Email**: A text input field with a red border and a red error message below it: "This is a required field".
- Password**: A text input field with a red border, a red error message below it: "This is a required field", and a small icon of a crossed-out circle to its right.
- Confirm password**: A text input field with a red border, a red error message below it: "This is a required field", and a small icon of a crossed-out circle to its right.

Below the input fields, there is a section for "Password minimum requirements:" with four radio button options:

- At least 8 characters
- At least one uppercase and lowercase letter
- At least one number
- At least one special character

At the bottom of the form, there is a checkbox with the text: I have read and agree to the [Terms of Service](#) and [Privacy Policy](#).

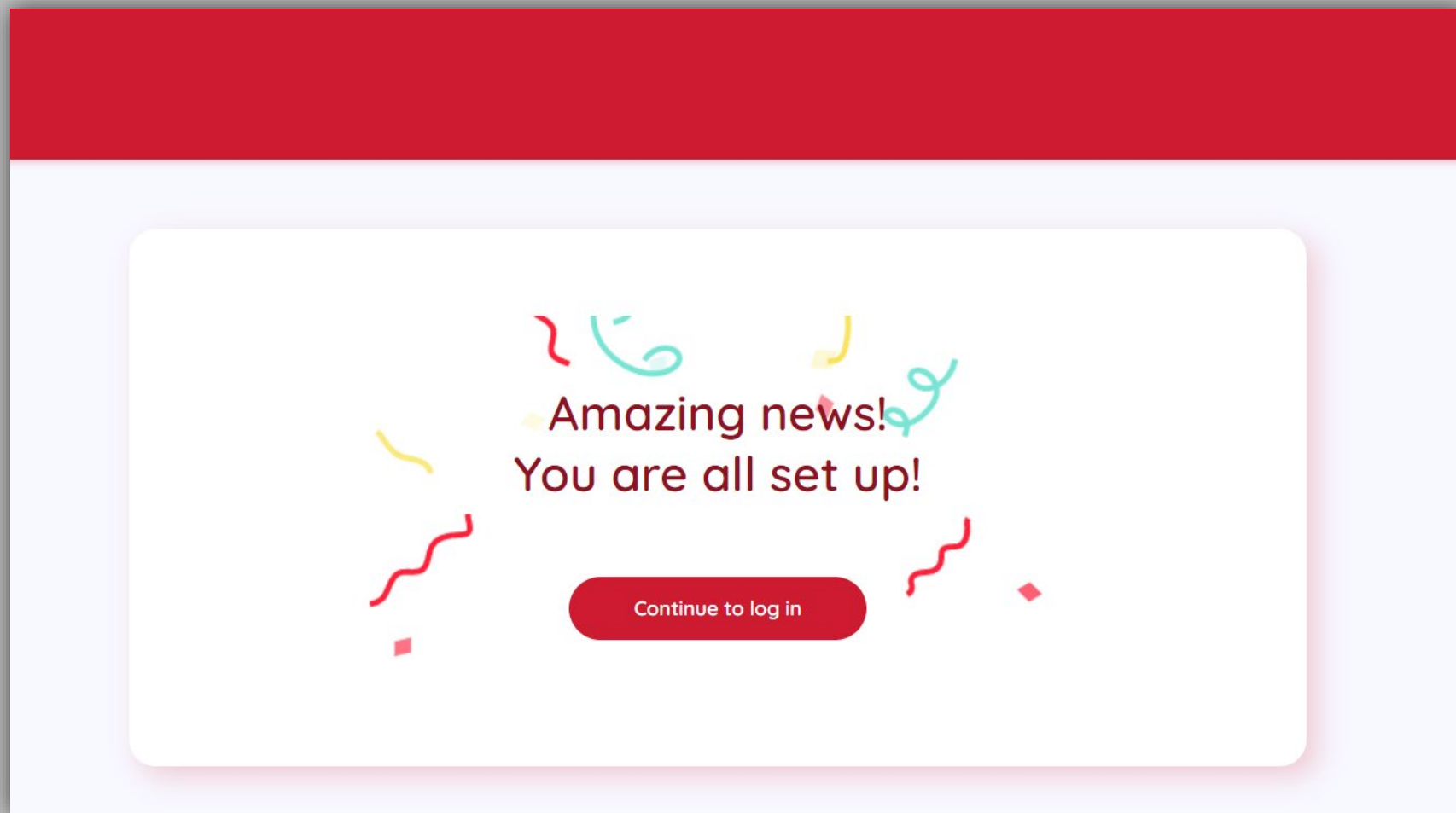
At the very bottom of the form, there is a "Next" button.

Login Success

“Continue to log in” using the user credentials you just created.

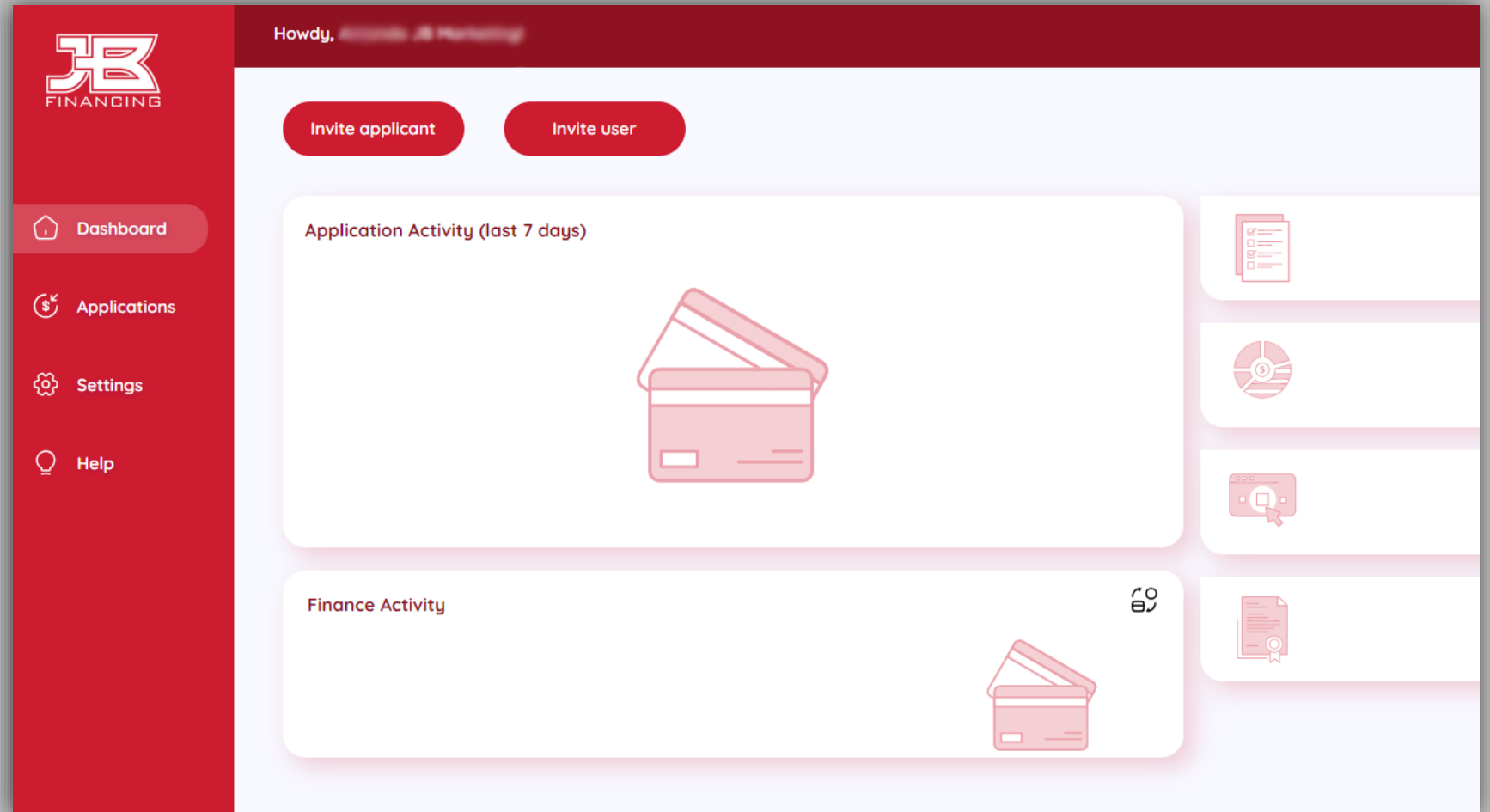
Save the login URL:

<https://jbfina.lending.online/login>



Dashboard View

Upon log in, you will access the admin dashboard, which provides an overview of recent activities by your clients.



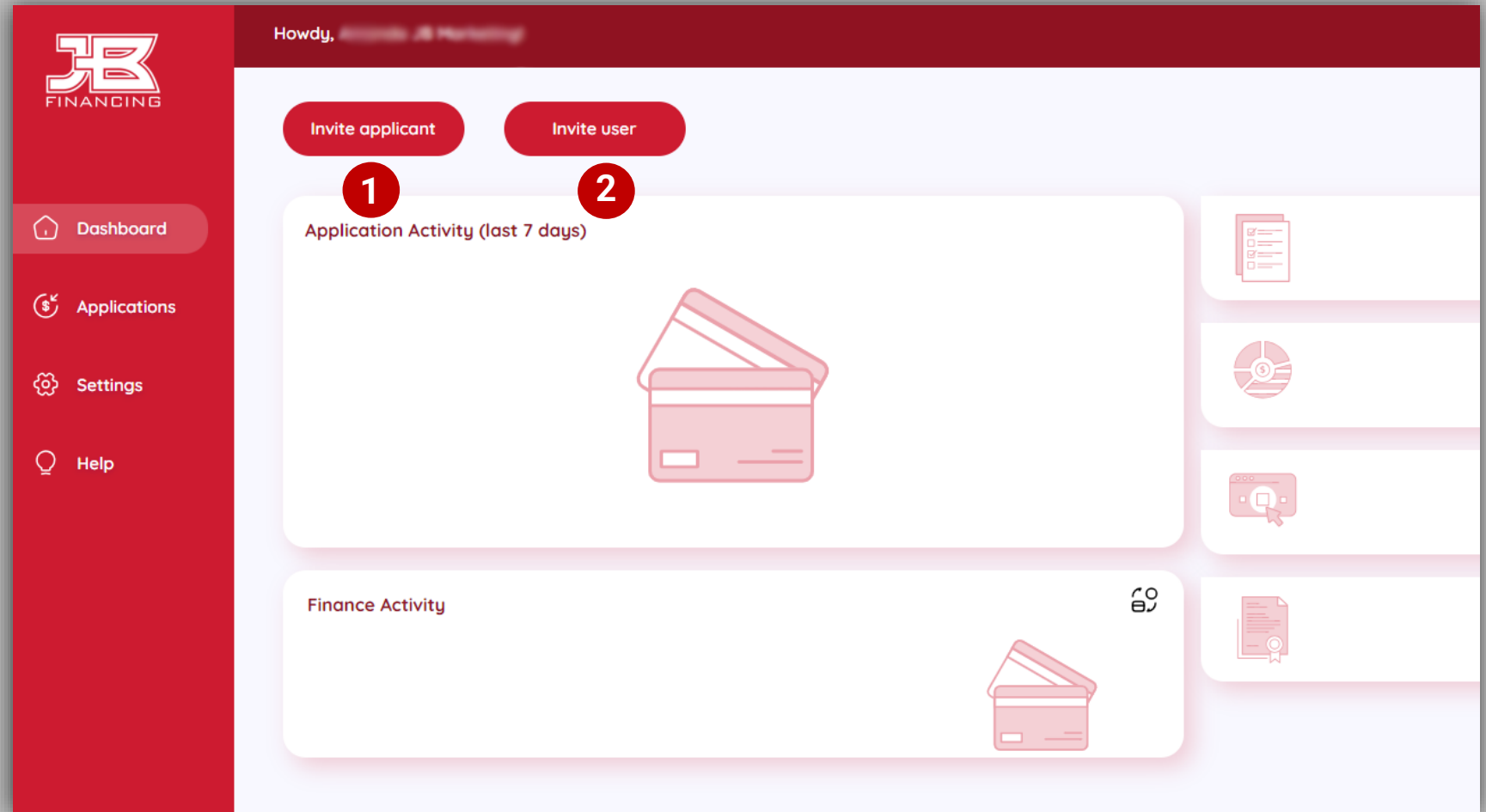
Invite an Applicant or User

1

“**Invite applicant**” allows you to invite your customers or potential customers to apply for financing.

2

“**Invite user**” allows you to invite a user from your business to access the portal.



View: Invite Options

1

Send invitation to applicant to apply for financing via email or text.

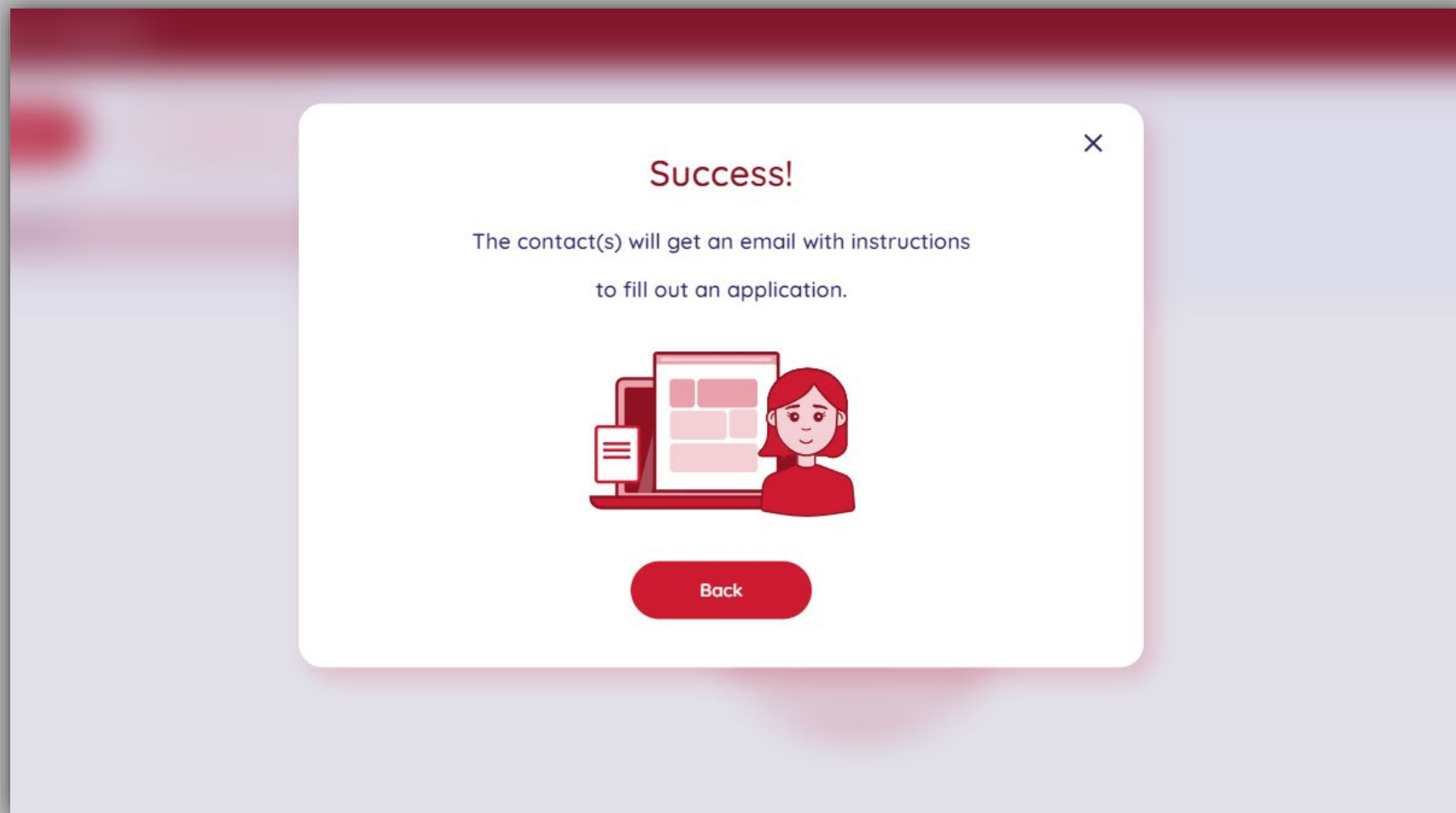
2

Invite multiple applicants to apply for financing by uploading a CSV file with email or phone number.

A screenshot of a web application interface showing two forms for sending invitations. The first form, titled 'Send invitation link via email or text - Main Location', has a close button (X) in the top right corner. It contains two input fields: 'Email' and 'Phone number', separated by the word 'or'. Below the input fields is a red 'Send' button. A disclaimer text reads: 'By clicking "Send", I affirm that I have received consent to email or text the individual an invitation to inquire about financing options.' The second form, titled 'Bulk invite via CSV file - Main Location', has a 'CSV file' input field with a red 'Upload' button. Above the input field is a red link that says 'Download blank CSV'. To the right of the input field is another red 'Upload' button. A disclaimer text reads: 'By clicking "Upload", I affirm that I have received consent to email or text the individuals contained in the CSV file an invitation to inquire about financing options.'

Success: Invitation Sent

You will reach a success page once you send an invitation link to your client to apply for financing.



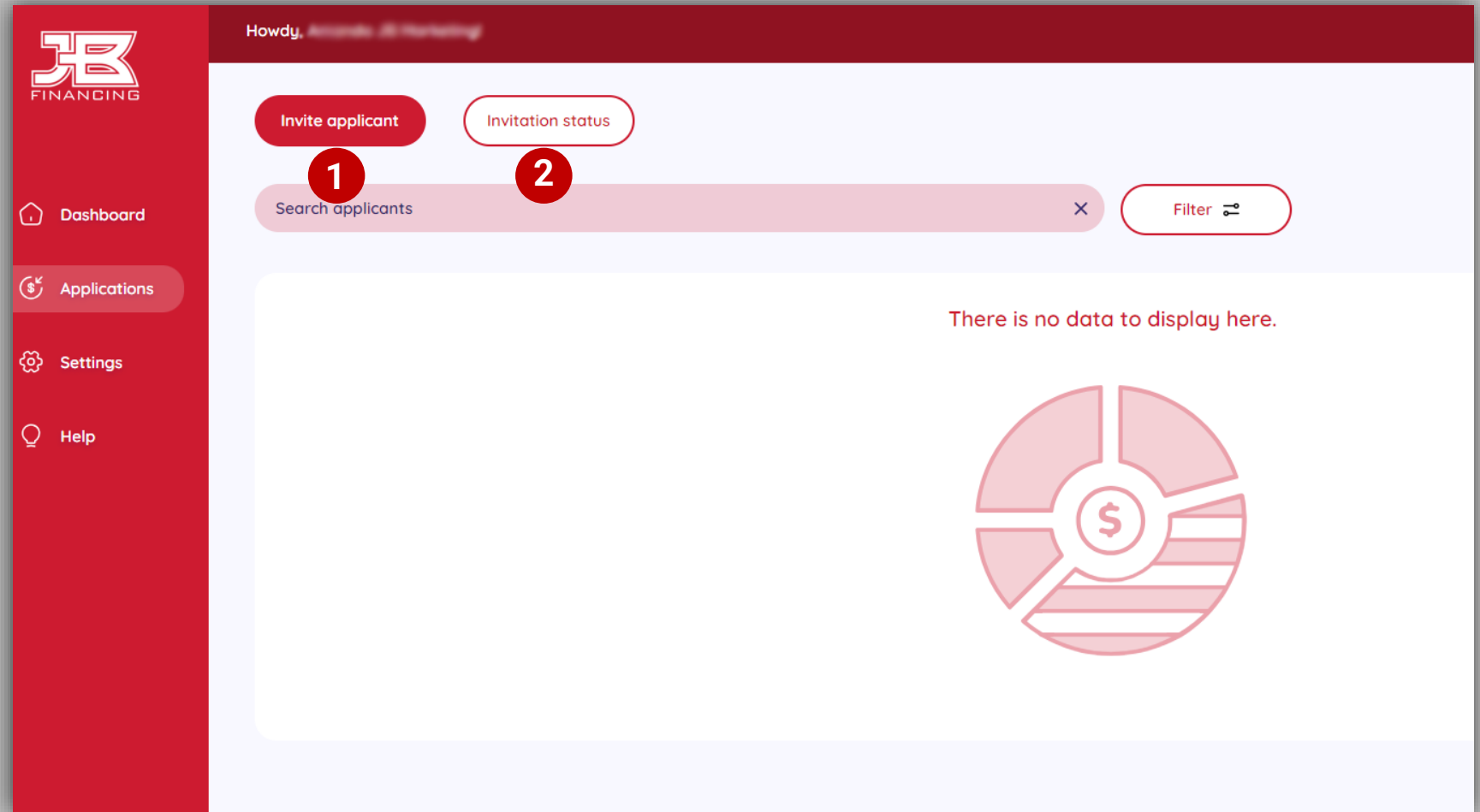
Invite and Invitation Status

1

You can **send an invite** link to clients from your applications submenu.

2

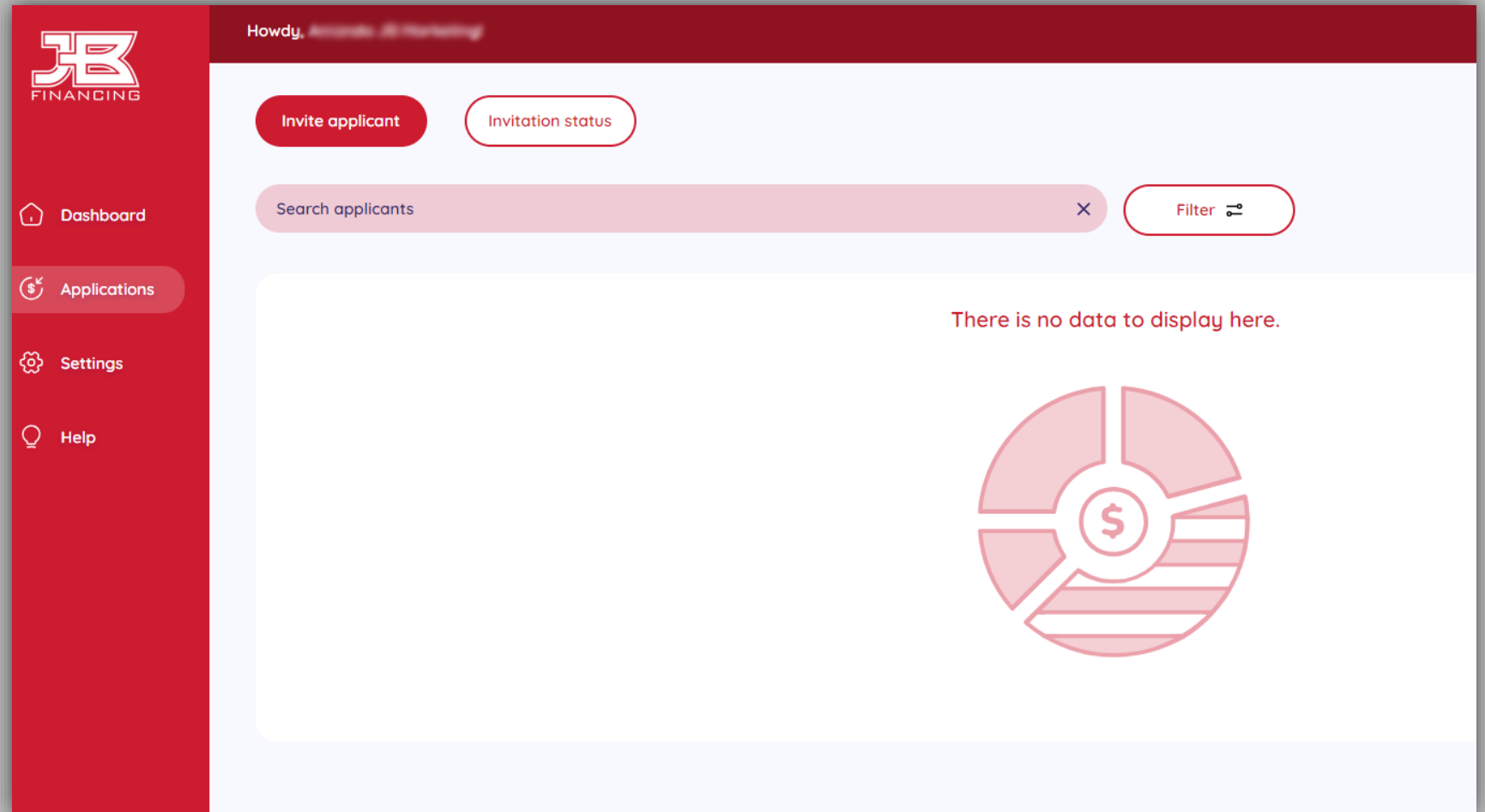
You can **view “Invitation status”** for any applicants that have been invited but haven’t started their application.



View Applicant Details

All applications that have been at least started, are shown on the **Applications** submenu, where you can search, filter, or export application data to find what you need.

Clicking the applicant's name will show their offers and other information, which is covered in the **Applicant Experience** guide.



Settings Menu

On the **Settings** tab view, there are several options available for editing including **business account** information and setting up your notification preferences in **your settings**.

You can customize your **landing page** settings under **experience settings**.



The screenshot shows the 'Your settings' tab in the JB FINANCING user interface. The top navigation bar includes 'Howdy, Amanda JB FINANCING', 'All', and a back arrow. Below the navigation are three tabs: 'Business account', 'Your settings' (selected), and 'Experience settings'. The main content area is titled 'Landing Page Preview' and shows a preview of the landing page with the JB FINANCING and refresh. company logos. The landing page text reads: 'Unlock your possibilities with JB Financing', 'Don't let a lack of financing options hold you back! We provide access to over 20 lenders to help with all of your financing needs.', and a 'Get Started' button. There are also images of a desktop and mobile device showing the 'Your offers' interface. A 'Preview' badge is in the top right corner of the preview area. On the right side, there are three settings sections: 'Landing Page Logo' with the refresh. company logo and an edit icon; 'Application Settings' with 'Lender group Default' and 'Max loan amount \$250,000.00'; and 'Experience Settings' with three items: '#CF152D (primary)', '#000000 (secondary)', and 'jbfinancing.com/refresh-company' with a globe icon and an edit icon.

Your Page URL and Logo

Under **Settings > Experience settings**, you can edit your landing page URL and the logo that appears on your landing page.

You can also direct customers to apply for financing by just directing them to your landing page URL, but you won't receive notifications unless the applicant is invited.



A screenshot of the JB FINANCING landing page settings interface. The interface is divided into three main sections: a top navigation bar, a central preview area, and a right-hand settings panel. The top navigation bar is dark red and contains the text 'Howdy, Amanda JB Financing' on the left, and 'All' and a back arrow icon on the right. Below this is a light red navigation bar with three tabs: 'Business account', 'Your settings', and 'Experience settings'. The central preview area shows a landing page with the JB FINANCING and refresh. company logos at the top. Below the logos is a red banner with the text 'Unlock your possibilities with JB Financing' and a 'Get Started' button. To the right of the banner are images of a desktop and mobile device displaying the 'Your offers' page. The right-hand settings panel is white and contains three sections: 'Landing Page Logo' with the refresh. company logo, 'Application Settings' with 'Lender group Default' and 'Max loan amount \$250,000.00', and 'Experience Settings' with three social media links: '#CF152D (primary)', '#000000 (secondary)', and 'jbfinancing.com/refresh-company'.

Settings: Edit Notifications

You will receive notifications of applicant status changes for those you invited to apply.

1

Adjust which notifications you want to receive under **Settings > Your settings**.

A screenshot of the JB FINANCING user interface. The top navigation bar is dark red with the text 'Howdy, [username]' and three tabs: 'Business account', 'Your settings' (highlighted with a red circle and the number '1'), and 'Experience settings'. A left sidebar contains navigation links: 'Dashboard', 'Applications', 'Settings' (highlighted), and 'Help'. The main content area is titled 'Your Notifications' and features a red header for 'Email notifications'. Below this, there is a list of notification types, each with a corresponding toggle switch on the right. All toggle switches are currently turned on (red).

Notification Type	Status
New borrower from landing page	On
Borrower accepted invite and applied	On
Application declined by lender	On
Application listed for funding	On
Application approved by lender	On
Application pending with lender	On
Application funded	On
User accepted invitation	On

Settings: Edit Users

1

Settings > Business account, go to users, where you have the option to select a user, and deactivate, if needed.

Howdy, Amanda JB FINANCING

Business account | Your settings | Experience settings

Users Invite user

First Name	Last Name	Role	Email	Status	Last login	Actions
John	Doe	Admin	john.doe@jbfinancing.com	Active	02/06/24	Actions 1

Locations Add location

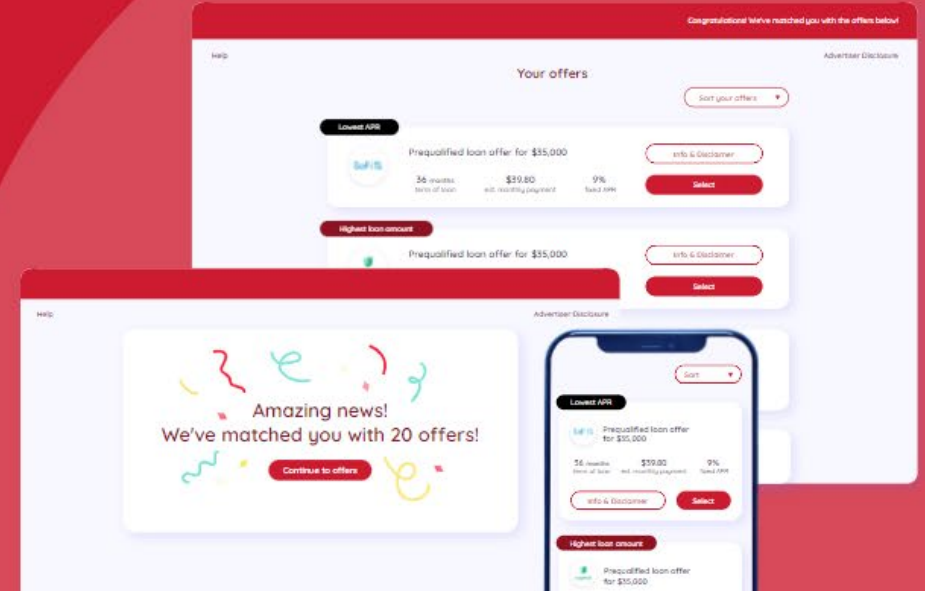
Location name	Address	City	State	Postal code	Status	Actions
Main Location	1234 Main St, Suite 100	Spring	TX	77001	Active	Actions 1



Unlock your possibilities with JB Financing

Don't let a lack of financing options hold you back! We provide access to over 20 lenders to help with all of your financing needs.

Get Started



Contact

✉ financing@jbwarranties.com

☎ 469-642-1198

📍 2221 Justin Road #119-PMB 151,
Flower Mound, TX 75028

