

How to Configure Products in Marksman

1. How to create a profit table

Within Marksman, go to your account settings. Choose 'Profit & Cost Manager'.

First, click on 'Create Profit Tables'.

Give the table a description, then set up the amounts. If you are doing a flat amount of 1%, no matter the loan amount, put \$1 as the loan minimum and 1.0 as the profit (%). If the amount varies depending on the loan amount, put the minimum amount per tier in the loan minimum and the corresponding profit amount in either the Profit (\$) or (%).

Click 'save new' before exiting the screen.

Create Profit Tables

Description ?	Agency Jumbo			
Branch ?	Corporate			
Loan Minimum ?	Profit (\$) ?	Profit (%) ?	Costs (\$) ?	Costs (%) ?
1		1		
600001		.875		
900001		.625		

save new +

2. How to Attach a Profit Table

Click "Settings" at the top of the screen to the right of your name. Then click 'Profit & Cost Manager' and then click 'Attach Profit to Investors/Products', In order to utilize your previously created profit tables, select one investor, highlight the desired products (hold CTRL on a PC to multi select), and then a profit table. Click 'attach profit table', located below the profit table box. Repeat until all investors have been configured.

If a product/investor combination already has an existing configuration, attaching a new profit table will overwrite the previous configuration.

Attach Profit to Investors/Products

Back to settings manager ←

Investor ?	Product Category (multiple allowed) ?	Branch ?	Profit Table ?
Alliance Mortgage Trust Yates One Bank Customer First National Nacirema National Customer Second Bank	Agency FNMA Jumbo 10 Yr Fixed Agency FNMA Jumbo 10 Yr Fixed - Tier 1 Agency FNMA Jumbo 15 Yr Fixed Agency FNMA Jumbo 15 Yr Fixed - Tier 1 Agency FNMA Jumbo 20 Yr Fixed - Tier 1 Agency FNMA Jumbo 20 Yr Fixed Agency FNMA Jumbo 25 Yr Fixed Agency FNMA Jumbo 30 Yr Fixed Agency FNMA Jumbo 30 Yr Fixed - Tier 1 Agency FNMA Jumbo 30 Yr LIBOR ARM 10/1	Corporate	30 year fixed 15 year fixed 5/1 arm 7/1 arm conforming products

display selected investor ↘
display selected product(s) ↘

Display Un-Attached, as well
attach profit table +