

ONWISE Contract Administration USER REFERENCE GUIDE

Click on your authorized user role to view the User Reference Guide.

F&I MANAGER

- Obtain Quotes
- Originate Contracts
- Print Final Contracts

BACK OFFICE MANAGER

- View and Void Contracts
- Remit Contracts
- Retrieve/View Billing Statements
- Obtain Cancellation Quotes

DEALER MANAGEMENT

- Originate Quotes
- Originate Contracts
- Remit Contracts
- Retrieve/View Billing Statements
- Obtain Cancellation Quotes
- Edit Templates





WELCOME TO

ONWISE Contract Administration

USER REFERENCE GUIDE

User Role: F&I Manager

HELP IS HERE

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

www.ONWise.com





ONWise Contract Administration Portal is your online resource to:

- Obtain Quotes
- Originate Contracts
- Print Final Contracts

Note: ONWise access is dependent on assignment of authorized user credentials under a predefined user role setup.

Getting Started

- Go to ONWise.com and log in using your assigned User ID and Password.
- You will be prompted to create a new password.
 - Passwords are case sensitive and must be at least eight characters and include at least one number (the last two passwords cannot be reused).
 - If you enter the wrong User ID or Password information three times in a row, the account will automatically lock, and you'll need to request a new password by clicking on the 'Forgot your password?' link.
- If you forgot your password, there is a 'Forgot your password?' link on the Login Screen.

Main Screen

The screenshot shows the ONWise Contract Administration Portal. At the top left is the ONWise logo with the tagline 'Contract Administration'. To its right is the text '22741-509 - DEALERSHIP NAME'. On the far right, there is a 'Welcome Amanda Miller' message and a 'Logout' link. A navigation bar below the header contains 'Main', 'Quote', and 'Settings' buttons. The main content area features a large 'WELCOME' message, a list of services (F&I Product Rating Quotes, Process Contracts Online, Remit Contracts Online, Cancellation Quotes), and contact information. A central vertical column contains 'ANNOUNCEMENTS', 'NEED HELP? CONTACT US', and 'CONNECT WITH US' (with a LinkedIn icon). A right-hand sidebar lists recent announcements with dates (4/1/14, 3/10/14, 12/31/13). A large 'WiseF&I' logo is at the bottom. Three callout boxes provide context: one for 'Help | Contact Us' in the top right, one for 'ANNOUNCEMENTS' pointing to the central column, and one for 'NEED HELP? CONTACT US' pointing to the yellow button.

ONWise
Contract Administration

22741-509 - DEALERSHIP NAME

Welcome Amanda Miller [Logout](#)

[Help | Contact Us](#)

Main Quote Settings

WELCOME

We are excited to bring you **ONWise**, Wise F&I's online resource for all the tools you'll need to grow your business.

We are providing you the resources for easy online access to:

- F&I Product Rating Quotes
- Process Contracts Online (eContracting)
- Remit Contracts Online (eRemitting)
- Cancellation Quotes

Leading to quicker transaction times and increased profits.

As a trusted provider in the industry for 25 years, we're here to keep your F&I office connected.

Contact us at 800-849-9559 or email ClientServices@WiseFandI.com

[Platform Terms Of Use](#)

ANNOUNCEMENTS

4/1/14
Check back here for announcements including updates and other important information.

3/10/14
Wise F&I launches the contract administration portal of their new web-based platform.

12/31/13
Wise F&I transitioned F&I Administration to support business and technology initiatives.

NEED HELP? CONTACT US

CONNECT WITH US

WiseF&I

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Help = Access to User's Guide

Contact Us = Ways to Reach Us

Main Screen = Announcements to keep you up-to-date on changes and important information

Quote Screen > Save Quote

The screenshot shows the ONWise Quote screen with the following sections:

- Quote Header:** Plan Purchase Date (04/23/2014), F&I Manager (Amanda Miller).
- Customer (Name, Demo):** First Name (Demo), MI, Last Name (Name), Title, Address, Address 2, City, State (WA), ZIP, Primary Phone, Secondary Phone, Email, Alternate Contact, Language (English).
- Vehicle (2009/CHEVROLET/MALIBU LTZ):** VIN (1G1ZK57B394137180), Odometer, Mfg. Warr. Start Date, Veh. Purchase Price, Veh. Purchase Date, Attributes (2009/CHEVROLET/MALIBU LTZ/Car Mid-Size Non-Luxury Traditional/Normal/4 Cyl/Front Wheel Drive/Gas), Stock #, Base Warranty, Powertrain Warranty.
- Loan/Lease:** Deal Type (Loan), Term (72), Finance Amt (\$20,000.00), MSRP, APR, Monthly Pmt, 1st Pmt Date, Balloon Amt, Residual Amt, Acct. #.
- Lienholder:**
- Products:** Load Template, Clear Template, Program (GAPWise), Type, Plan (GWFP2200), Term (72 months), Deductible, Retail (\$595.00), Options, Submit, Print, Close, X.
- Buttons:** Save Quote, Print Quote, Close, Cancel Changes.

From the **Quote** menu choose '**New**' from the dropdown to create a new Quote.

The following fields must be provided to save a quote:

- First Name
- Last Name
- VIN
- Deal Type
- Term
- Finance Amount

Click '**Save Quote**'

Note: Retail rate must be re-entered if quote is saved but not submitted.

Quote Screen > Print Quote (Optional)

ONWise™ Contract Administration

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller Logout

Main Quote Settings

Quote

Plan Purchase Date: 04/23/2014
F&I Manager: Amanda Miller

Customer (Name, Demo)
First Name: MI
Address: Demo
Email: Demo

Vehicle (2009/CHEVROLET/MALIBU LTZ)
VIN: 1G1ZK57B394137180
Purchase Date: Apr 17, 2014

Attributes (2009/CHEVROLET/MALIBU LTZ)
Stock #:
Base Warranty:
Odometer:
Vehicle: 1G1ZK57B394137180
Customer: Demo Name
Seller: Dealership Name, Address, City, State ZIP, Phone
F&I Manager: Amanda Miller

Product	Program	Plan	Options	Price
GAP	GAPWise	New APP FC101 Term: 72 months \$0		\$595.00
TOTAL				\$595.00

Deal Type: Loan
Term: 72
Finance: \$20,000.00

Lienholder:
Products:
Load Template:
Program: GAPWise
Type:
Plan: GWFP2200
Term: 72 months
Deductible:
Retail: \$595.00
Options:
Submit:
\$595.00

Save Quote Print Quote Close Cancel Changes

From the **Quote screen** you can print the quote.

Click **'Print Quote'**

Quote Screen > Submit Quote

The screenshot shows the ONWise Quote screen with the following sections:

- Quote Header:** Plan Purchase Date (04/23/2014), F&I Manager (Amanda Miller).
- Customer (Name, Demo):** First Name (Demo), MI, Last Name (Name), Title, Address (1670 Fenpark Drive), Address 2, City (St. Louis), State (MO), ZIP (63026), Primary Phone, Secondary Phone, Email, Alternate Contact, Language (English).
- Vehicle (2009/CHEVROLET/MALIBU LTZ):** VIN (1G1ZK57B394137180), Odometer, Mfg. Warr. Start Date, Veh. Purchase Price, Veh. Purchase Date, Attributes (2009/CHEVROLET/MALIBU LTZ/Car Mid-Size Non-Luxury Traditional/Normal/4 Cyl/Front Wheel Drive/Gas), Stock #, Base Warranty, Powertrain Warranty.
- Loan/Lease:** Deal Type (Loan), Term (72), Finance Amt (\$20,000.00), MSRP, APR, Monthly Pmt, 1st Pmt Date, Balloon Amt, Residual Amt, Acct. #.
- Lienholder:**
- Products:** Load Template, Clear Template, Program (GAPWise), Type, Plan (GWFP2200), Term (72 months), Deductible, Retail (\$595.00), Options, **Submit** (highlighted), Print, Close, Cancel Changes.

Quote saved successfully. Buttons: Save Quote, Print Quote, Close, Cancel Changes.

To **submit a quote** and **create a contract** the following fields must be provided:*

- First Name
- Last Name
- Address
- City
- State
- Zip
- VIN
- Deal Type
- Term
- Finance Amount
- GAP Product
- Term
- Retail Price

Preview Contract
Click '**Submit**' to generate a contract.

ONLY SUBMIT VALID CONTRACTS. ALWAYS PREVIEW FIRST.

If edits or additional information is added, click '**Save Quote**' before '**Submit**'.

*Required fields vary by product. Additional fields may be required.

Quote Screen > Generate Contract PDF

ONWise™ Contract Administration

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Help | Contact Us
Welcome Amanda Miller Logout

Main Quote Settings

Quote

Plan Purchase Date: 04/23/2014
F&I Manager: Amanda Miller

Customer (Name, Demo)

First Name: Demo, MI: , Last Name: Name, Title: , Address: 1670 Fenpark Drive, Address 2: , City: St. Louis, State: MO, ZIP: 63026, Primary Phone: , Secondary Phone: , Email: , Alternate Contact: , Language: English

Vehicle (2009/CHEVROLET/MALIBU LTZ)

VIN: 1G1ZK57B394137180, Odometer: , Mfg. Warr. Start Date: , Veh. Purchase Price: , Veh. Purchase Date: , Attributes: (2009/CHEVROLET/MALIBU LTZ/Car Mid-Size Non-Luxury Traditional/Normal/4 Cyl/Front Wheel Drive/Gas), Stock #: , Base Warranty: , Powertrain Warranty:

Loan/Lease

Deal Type	Term	Finance Amt	MSRP	APR	Monthly Pmt	1st Pmt Date	Balloon Amt	Residual Amt	Acct. #
Loan	72	\$20,000.00							

Lienholder

Products

Load Template: , Clear Template

Program	Type	Plan	Term	Deductible	Retail
					\$0.00

Contracts have been submitted for all available products.

Contracted Products

Product	Program	Type	Plan	Term	Deductible	Retail
GAP	GAPWise		GWFP2200	72 months		\$595.00

APP000000051

Save Quote Print Quote Close Cancel Changes

After clicking 'Submit' a contract is generated as a PDF and can be printed for the customer's signature.

On the Quote screen, the contract will appear under Contracted Products.

Click **Contract Number** to view the contract's general information screen.

Click **PDF icon** to view the PDF of the contract.

Quote Screen > Search

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Main Quote Settings

Filters

Search By: F&I Manager Amanda Miller Search Add New

Plan Purchase Date From: 04/17/2014 To: 04/17/2014

Quotes

Customer Name, Dem	VIN	Year/Make/Model	Plan Purchase Date	F&I Manager	Product	Stock #	Edit
	94137180	2009 CHEVROLET MALIBU LTZ	04/17/2014	Amanda Miller	GAP		

From the **Quote menu** choose '**Search**' from the dropdown.

Search By:

- Customer Last Name
- VIN
- Year/Make/Model
- Stock Number
- Plan Purchase Date

Click on the **VIN link** to view the Quote screen.

From here you can click the **Contract Number** to go to the contract general information screen, or click the **PDF icon** to view the contract.

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Main Quote Settings

Quote

Plan Purchase Date: 04/29/2014 F&I Manager: Amanda Miller

Customer (Name, Demo)

First Name: MI Last Name: Name Title

Demo: Address: Address 2: City: State: ZIP: Primary Phone: Secondary Phone

1670 Ferguson Drive St. Louis MO 63026

Email: Alternate Contact: Language: English

Vehicle (2009CHEVROLETMALIBU LTZ)

VIN: 1G1ZK378094137180 Odometer: Mig. Warr. Start Date: Veh. Purchase Price: Veh. Purchase Date:

Warranty: 2009 CHEVROLET MALIBU LTZ Car Mid-Size Non-Luxury Traditional Normal 4 Dr/Front Wheel Drive/Gas

Stock #: Lease Warranty: Powertrain Warranty:

Lease/Lend

Deal Type: Term: Finance Amt: MSRP: APR: Monthly Pmt: 1st Pmt Date: Balloon Amt: Residual Amt: Acct. #

Loan: 72 \$20,000.00

Lender

Product

Product	Program	Type	Plan	Term	Deductible	Retail
GAP	GAPVise		GWFP2200	72 months	\$0	\$0

Contracts have been submitted for all available products.

Contracted Products

Product: GAP Program: GAPVise Type: Plan: GWFP2200 Term: 72 months Deductible: \$0 Retail: \$0

Save Quote Print Quote Close

Note: Click the column titles in the black bar to sort the search results in ascending or descending order.

Status Symbol Definitions

ONWise™ Contract Administration

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Main Quote Settings

General Information [Back to Quote](#)

Purchase Date: 04/17/2014	Customer Name: Name, Demo	Vehicle: 1G1ZK57P94137180
Mfg. Warr. Start Date:	Address: 1670 Fenpark Drive	2009 CHEVROLET MALIBU LTZ
Seller:	St. Louis, MO 63026	Sale Odometer: 0
F&I Manager: Amanda Miller	Primary Ph.:	Veh. Purchase Date:
Quote	Secondary Ph.:	
Stock #:	Email:	
Deal Type: Loan	Language: EN	
	Alt. Contact:	

Plan Type: New	Term: 72	APR:	Amount Financed: \$20,000.00	Retail: \$595.00
Program: GAPWise	First Payment Date:	Monthly Payment:	Balloon Amount:	
Plan Name: GWFP2200	Residual Amount:	Account Number:	MSRP:	
Options:	Payment Option: Single Pay			
Covered Components	Effective Date: 04/17/2014 - 04/17/2020			

Claims

[Copy of Contract](#) [Cancellation Quote](#)

Status Symbols designate the status of the contract.

See status symbol definitions below.

Status Symbol Definition:

- P** Pending: Submitted but NOT Remitted
- PS** Pending Billed: Submitted AND Remitted
- A** Active: Submitted, Remitted AND Paid
- V** Void: Voided Contract
- C** Cancelled: Contract Cancelled
- E** Expired: Contract Term Expired
- R** Rejected: Contract Rejected (Beyond Underwriting Limits)

**WE ARE
HERE TO HELP**

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USER'S GUIDE

CONNECT
WITH US 

Please contact our Client Services Team and ask for *ONWise Support*.

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

Live phone support Monday - Friday,
8:00 am - 7:00 pm CST

WiseF&I[®]



WELCOME TO

ONWISE Contract Administration

USER REFERENCE GUIDE

User Role: Back Office Manager

HELP IS HERE

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

www.ONWise.com





ONWise Contract Administration Portal is your online resource to:

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- If you forgot your password, there is a 'Forgot your password?' link on the Login Screen.

Main Screen

The screenshot shows the ONWise Contract Administration Portal main screen. At the top left is the ONWise logo with the tagline 'Contract Administration'. To its right is the text '22741-509 - DEALERSHIP NAME'. Further right is a 'Welcome' message and a 'Logout' link. A navigation bar contains buttons for 'Main', 'Contract', 'Remittance', 'Reports', and 'Settings'. The main content area features a large 'WELCOME to ONWise CONTRACT ADMINISTRATION PORTAL' header. Below this, there is a welcome message, a list of resources (F&I Product Rating Quotes, Process Contracts Online, Remit Contracts Online, Cancellation Quotes), a quote about transaction times, and contact information (800-849-9559, ClientServices@WiseFandI.com). A central vertical column contains an 'ANNOUNCEMENTS' arrow, a 'NEED HELP? CONTACT US' button, and a 'CONNECT WITH US' button with a LinkedIn icon. On the right, there are three announcement entries with dates: 4/1/14, 3/10/14, and 12/31/13. A footer at the bottom right says 'WiseF&I'.

Help | Contact Us

Help = Access to User's Guide

Contact Us = Ways to Reach Us

Main Screen = Announcements to keep you up-to-date on changes and important information

Contract Screen > Search

22741-509 - DEALERSHIP NAME

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Welcome Amanda Miller Logout

Main Contract Remittance Reports Settings

Search By: Product GAP Search Advanced Search

Sale Date 04/10/2014 To: 04/17/2014

Contract List

Void	Customer	VIN	Purchase Date	Product	Contract #	Term*	Retail Edit
<input type="checkbox"/>	Sample, Sample	1GC2KXCG2CZ300627	04/16/2014	GAP	APPQ00000043	72	\$595.00
<input type="checkbox"/>	Test2, Test	1GC2KXCG2CZ300627	04/15/2014	GAP	APPQ00000044	72	\$595.00
<input type="checkbox"/>	Test3, Test	1C4AJWAG2DL508426	04/15/2014	GAP	APPQ00000045	72	\$595.00

Status: P - Pending PS - Pending-Billed A - Active V - Void C - Cancelled E - Expired R - Rejected

Search By:

- Status*
- Product
- F&I Manager
- Contract #
- VIN
- Customer Last Name
- Customer First Name
- City
- State
- Zip Code
- Sales Date

*Status Symbol Definition:

- P** Pending: Submitted but NOT Remitted
- PS** Pending Billed: Submitted AND Remitted
- A** Active: Submitted, Remitted AND Paid
- V** Void: Voided Contract
- C** Cancelled: Contract Cancelled
- E** Expired: Contract Term Expired
- R** Rejected: Contract Rejected (Beyond Underwriting Limits)

Advanced Search:

Use this to search by a combination of fields.

Note: Click 'Customer' or 'Purchase Date' in the black bar to sort the search results in ascending or descending order.

Contract Screen > Contract Info

ONWise
Contract Administration

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Main Contract Remittance Reports Settings

General Information

[Back to Search](#)

Purchase Date: 04/16/2014	Customer Name: Sample, Sample	Vehicle: 1GC2KXCG2CZ300627 Attributes
Mfg. Warr. Start Date:	Address: 1670 Fenpark	2012 CHEVROLET SILVERADO
Seller:	St. Louis, MO 63026	K2500HD LT
F&I Manager: Amanda Miller	Primary Ph.:	Sale Odometer: 0
Stock #:	Secondary Ph.:	Veh. Purchase Date:
Deal Type: Loan	Email:	
Lienholder: Edit Lienholder	Language: EN	
	Alt. Contact:	
	Edit Customer Information	

Plan Type: New	Term: 72	APR:	Amount Financed: \$30,000.00	Retail: \$595.00
Program: GAPWise	First Payment Date:	Monthly Payment:	Balloon Amount:	
Plan Name: GWFP2200	Residual Amount:	Account Number:	MSRP:	
Added Options: Covered Components	Payment Option: Single Pay			
	Effective Date: 04/16/2014 - 04/16/2020			

Claims

[Copy of Contract](#) **Re-generate Contract** Cancellation Quote Void Contract

Click the Contract # from the search list to view the general information for that contract.

From this screen you can:

- Edit Lienholder (If contract is Pending)
- Edit Customer Information* (If contract is Pending)
- View the Contract and Print
- Re-generate Contract
- Void Contract

Re-generate Contract: If a change is made, the contract must be Re-generated to update the PDF with the changed information.

*The Customer Name cannot be changed. If you need to edit the customer name, please contact Client Services or void the contract and start over.

Contract Screen > Void Contract

The screenshot shows the ONWise Contract Administration interface. At the top, there is a navigation bar with 'Main', 'Contract', 'Remittance', 'Reports', and 'Settings'. The 'Contract' tab is selected. The main content area is divided into two sections: 'General Information' and 'Plan Information'. The 'General Information' section includes fields for Purchase Date, Mfg. Warr. Start Date, Seller, F&I Manager, Stock #, Deal Type, Lienholder, Customer Name, Address, Primary Ph., Secondary Ph., Email, Language, Alt. Contact, Vehicle, Sale Odometer, and Veh. Purchase Date. The 'Plan Information' section includes fields for Plan Type, Program, Plan Name, Added Options, Term, APR, Amount Financed, Retail, First Payment Date, Monthly Payment, Balloon Amount, Residual Amount, Account Number, MSRP, Payment Option, and Effective Date. At the bottom of the screen, there are three buttons: 'Re-generate Contract', 'Cancellation Quote', and 'Void Contract'. The 'Void Contract' button is highlighted with a red box.

General Information	
Purchase Date	04/16/2014
Mfg. Warr. Start Date	
Seller	
F&I Manager	Amanda Miller
Stock #	
Deal Type	Loan
Lienholder	Edit Lienholder
Customer Name	Sample, Sample
Address	1670 Fenpark St. Louis, MO 63026
Primary Ph.	
Secondary Ph.	
Email	
Language	EN
Alt. Contact	Edit Customer Information
Vehicle	1GC2KXCG2GZ300627 2012 CHEVROLET SILVERADO K2500HD LT
Sale Odometer	0
Veh. Purchase Date	

Plan Information	
Plan Type	New
Program	GAPWise
Plan Name	GWFP2200
Added Options	Covered Components
Term	72
APR	
Amount Financed	\$30,000.00
Retail	\$595.00
First Payment Date	
Monthly Payment	
Balloon Amount	
Residual Amount	
Account Number	
MSRP	
Payment Option	Single Pay
Effective Date	04/16/2014 - 04/16/2020

Click **'Void Contract'** and confirm you would like to void the contract.

Once you **'Confirm Void'** the copy of the contract will have the word VOID across it.

The status symbol will change to V.

You can only void **Pending** **P** contracts.

Once a contract has been remitted you may not void the contract. Contact Client Services to cancel a remitted contract.

V Void: Voided Contract Because Not Executed

Contract Screen > Cancellation Quote

The screenshot shows the ONWise Contract Administration interface. At the top, there is a navigation bar with 'Main', 'Contract', 'Remittance', 'Reports', and 'Settings'. The 'Contract' tab is selected. Below the navigation bar, there is a 'General Information' section with a 'Back to Search' link. The contract details include:

Purchase Date:	12/14/2013	Customer Name:	Sample, Sample	Vehicle:	SJ6RM4H31EL022901
Mfg. Warr. Start Date:		Address:	1670 Fenpark		2014 HONDA CR-V LX
Seller:			St. Louis, MO 63026	Sale Odometer:	138
F&I Manager:		Primary Ph.:		Veh. Purchase Date:	12/14/2013
Stock #:		Secondary Ph.:			
Deal Type:	Loan	Email:			
Lienholder:		Language:	EN		
		Alt. Contact:			

Below the general information, there is a section for contract terms and financials:

Plan Type:	New	Term:	60	APR:	1.90%	Amount Financed:	\$25,800.58	Retail:	\$595.00
Program:	GAPWise	First Payment Date:		Monthly Payment:		Balloon Amount:			
Plan Name:	GWFP2200	Residual Amount:		Account Number:		MSRP:			
Options:		Payment Option:	Single Pay						
Covered Components		Effective Date:	12/14/2013 - 12/14/2018						

At the bottom of the screen, there are three buttons: 'Re-generate Contract', 'Cancellation Quote' (highlighted with a red box), and 'Void Contract'. A red arrow points from the text on the right to the 'Cancellation Quote' button.

Only **ACTIVE** contracts can be cancelled.

After choosing an **ACTIVE** contract from the Contract screen, click '**Cancellation Quote**' to calculate the cancellation amount.

A Active: Submitted, Remitted AND Paid

Contract Screen > Cancellation Quote

ONWise™ Contract Administration

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Welcome Amanda Miller Logout

Main Contract Remittance Reports Settings

Contract Information [Back To Contract](#)

Contract #: APP567577
Sale Date: 12/14/2013
Customer:
Seller:
Lienholder:

Cancellation Information

Cancel Date:
Cancel Odometer:
Cancel Reason:

Cancellation Rates

Orig. Retail Cost:
Orig. Net Cost:
Non Ref. fee (Customer):
Cancellation Fee:
Net Refund From Admin.:
Refund From Seller:
Cancellation Refund Amount:

Discard Changes **Calculate** Save Quote Cancel Contract Cancellation Report: Print

Cancellation quotes are calculated based on the mileage of the vehicle or the time period the contract has been in force and are subject to change due to increases in mileage or time.

If the administrator has notice of a lienholder or lessor and a discharge of lien is not provided, any refund will be issued jointly to the customer and the lienholder/lessor.

Under Cancellation Information you will need to in put:

- Cancel Date
- Cancel Odometer*
- Cancel Reason

Click **'Calculate'** to calculate and view cancellation rates.

*For GAP, Odometer entry is required and must be higher than the original contract amount. If unknown, use 500,000.

Contract Screen > Cancellation Quote

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Contract Administration

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Main Contract Remittance Reports Settings

Contract Information [Back To Contract](#)

Contract #: APP567577
Sale Date: 12/14/2013
Customer:
Seller:
Lienholder:

Cancellation Information

Cancel Date: 05/05/2014
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

Orig. Retail Cost:	\$595.00	FACTORS	
Orig. Net Cost:		Term (%):	92.223
Non Ref. fee (Customer):	\$0.00	Mileage (%):	0.000
Cancellation Fee:	(\$50.00)	Calc Method:	
Net Refund From Admin.:			
Refund From Seller:			
Cancellation Refund Amount:	\$498.73		

Discard Changes Calculate **Save Quote** Cancel Contract Cancellation Report: Print

Cancellation quotes are calculated based on the mileage of the vehicle or the time period the contract has been in force and are subject to change due to increases in mileage or time.

If the administrator has notice of a lienholder or lessor and a discharge of lien is not provided, any refund will be issued jointly to the customer and the lienholder/lessor.

Once the calculation is made click 'Save Quote'.

Contract Screen > Cancellation Quote

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Main | Contract | Remittance | Reports | Settings

Contract Information [Back To Contract](#)

Contract #: APP567577
Sale Date: 12/14/2013
Customer:
Seller:
Lienholder:

Cancellation Information

Cancel Date: 05/05/2014
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

FACTORS
Orig. Retail Cost: \$595.00 | Term (%): 92.223

CANCELLATION QUOTE WORKSHEET

Contract Information

Contract Number	APP567577	Sale Date	12/14/2013
Customer Last Name		Seller Name	
Customer First Name		Seller ID	
VIN	S16RMAH33E1022901	Lienholder	American Honda Finance Corp
Vehicle Year	2014		
Vehicle Make	HONDA		
Vehicle Model	CR-V LX		

Cancellation Information

Cancel Date	05/05/2014	Term Refund Factor	92.223 %
Cancel Reason	Paid Off Vehicle	Cancel Odometer	40000
		Mileage Refund Factor	0.000 %

Refund Information

Orig. Retail Cost	\$595.00
Orig. Net Cost	
Non-refundable Fee	\$0.00
Cancellation Fee	(\$50.00)
Net Refund from Provider	
Refund from Seller	
Cancellation Refund Amount	\$498.73

Customer Refund

Amount Due Customer	\$498.73
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Disclaimer

Please Note: This contract cancellation quote reflects current information as of today and is subject to change daily. No cancellation will be processed until a proper request has been submitted in writing via fax to 836-600-4426. If you have any questions regarding the cancellation process, please contact Client Services at 800-849-9555.

Quote saved

Cancellation Report: Cancellation Quote Worksheet - Dr | **Print**

After you click **'Save Quote'** a cancellation quote worksheet will be created.

Click **'Print'** to print the cancellation quote worksheet.

Printed cancellation quote worksheet and supporting documentation should be submitted to Wise F&I via fax to 636-600-4426.

Remittance Screen > Create

ONWise™ Contract Administration

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller Logout

Main Contract **Remittance** Reports Settings

Create Remittance

Product: **GAP** Program: ALL Contract Count: 0
Lienholder: ANY Plan Purchase Date: ALL DATES Total Remit: \$0.00
Filter

[Include This Page](#) [Exclude This Page](#) [Include All Pages](#) [Exclude All Pages](#)

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Remit
<input type="checkbox"/>	Sample, Sample	1GC2KXCG2CZ300627	04/16/2014	APPQ00000047	GWFP2200	72		\$198.00

<< Prev Page 1 of 1 Next >> Records Per Page: 50

[Preview Remittance](#) [Download All to Spreadsheet](#) **Save** **Submit**

From the **Remittance Menu** choose **'Create'** from the dropdown. All pending contracts will be listed.

Check the contracts to remit then click **'Save'**.

Click **'Submit'** to remit selected contracts, print out the Remittance page and send along with payment to Wise F&I.

Click **'Preview Remittance'** to view a PDF.

Choose product type to remit.

Note: No edits can be made once a contract is remitted. Contact Client Services to make any changes.

Once a contract is remitted the status symbol will change to:
Ⓟ Pending Billed.

Once the remittance is sent and payment is applied, the status symbol will change to: ⓐ Active.

Remittance Screen > Search

ONWise™ Contract Administration

22741-509 - DEALERSHIP NAME

Welcome Amanda Miller Logout

Main Contract **Remittance** Reports Settings

Remittance Search

Remittance #: Remittance Search: Automatic and Manual

Product Type: GAP

Submission Date: ALL DATES Filter

Remittances

<< Prev Page 1 of 1 Next >> Records Per Page: 50

Submission Date	Cycle Month	Remittance Number	Product	Contract Count	Total Remit	Reprint
03/25/2014	March 2014	22741-509-002	GAP	1	\$148.00	
03/24/2014	March 2014	22741-509-001	GAP	1	\$148.00	

<< Prev Page 1 of 1 Next >> Records Per Page: 50

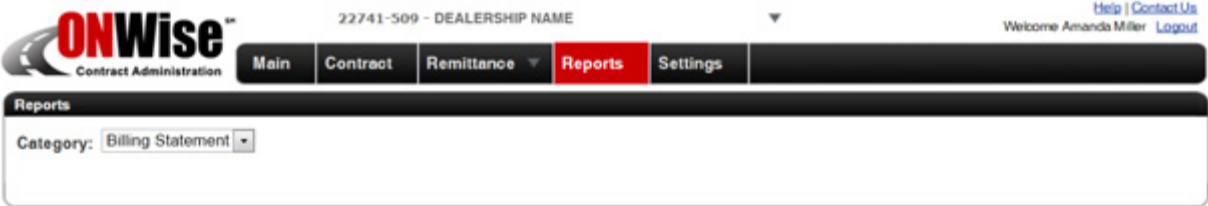
On the **Remittance menu** choose '**Search**' from the dropdown.

Search By:

- Remittance #
- Product Type
- Submission Date

Note: Clicking 'Submission Date' or 'Cycle Month' in the black bar will sort the search results in ascending or descending order.

Reports Screen



**ADDITIONAL
REPORTS
TO COME**

**WE ARE
HERE TO HELP**

DOWNLOAD THE
USER'S GUIDE

CONNECT
WITH US 

Please contact our Client Services Team and ask for *ONWise Support*.

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

Live phone support Monday - Friday,
8:00 am - 7:00 pm CST

WiseF&I[®]



WELCOME TO

ONWISE Contract Administration

USER REFERENCE GUIDE

User Role: Dealer Management

HELP IS HERE

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

www.ONWise.com





ONWise Contract Administration Portal is your online resource to:

- Obtain Quotes
- Originate Contracts
- Remit Contracts
- Retrieve/View Billing Statements
- Obtain Cancellation Quotes
- Edit Templates

Note: ONWise access is dependent on assignment of authorized user credentials under a predefined user role setup.

Getting Started

- Go to ONWise.com and log in using your assigned User ID and Password.
- You will be prompted to create a new password.
 - Passwords are case sensitive and must be at least eight characters and include at least one number (the last two passwords cannot be reused).
 - If you enter the wrong User ID or Password information three times in a row, the account will automatically lock, and you'll need to request a new password by clicking on the 'Forgot your password?' link.
- If you forgot your password, there is a 'Forgot your password?' link on the Login Screen.

Main Screen

The screenshot shows the ONWise Contract Administration Portal main screen. At the top left is the ONWise logo with 'Contract Administration' below it. To the right of the logo is the text '22741-509 - DEALERSHIP NAME'. Further right is a 'Welcome' message and a 'Help | Contact Us' link. Below this is a navigation bar with buttons for 'Main', 'Quote', 'Contract', 'Remittance', 'Reports', and 'Settings'. The main content area features a large 'WELCOME to ONWise CONTRACT ADMINISTRATION PORTAL' header. Below the header, there is a welcome message, a list of resources, and a list of announcements. A central vertical column contains three callout boxes: 'ANNOUNCEMENTS', 'NEED HELP? CONTACT US', and 'CONNECT WITH US' with a LinkedIn icon. A red arrow points from the 'WELCOME' text to the 'ONWise' logo. Three callout boxes with red borders and text are overlaid on the right side of the screen: 'Help = Access to User's Guide' (pointing to the 'Help | Contact Us' link), 'Contact Us = Ways to Reach Us' (pointing to the 'Contact Us' link), and 'Main Screen = Announcements to keep you up-to-date on changes and important information' (pointing to the 'ANNOUNCEMENTS' box).

ONWise
Contract Administration

22741-509 - DEALERSHIP NAME

Welcome Amanda Miller

[Help | Contact Us](#)

Main Quote Contract Remittance Reports Settings

WELCOME to ONWise CONTRACT ADMINISTRATION PORTAL

We are excited to bring you **ONWise**, Wise F&I's online resource for all the tools you'll need to grow your business.

We are providing you the resources for easy online access to:

- F&I Product Rating Quotes
- Process Contracts Online (eContracting)
- Remit Contracts Online (eRemitting)
- Cancellation Quotes

Leading to quicker transaction times and increased profits.

As a trusted provider in the industry for 25 years, we're here to keep your F&I office connected.

Contact us at 800-849-9559 or email ClientServices@WiseFandI.com

Platform Terms Of Use

ANNOUNCEMENTS

NEED HELP? CONTACT US

CONNECT WITH US

4/1/14
Check back here for announcements including updates and other important information.

3/10/14
Wise F&I launches the contract administration portal of their new web-based platform ONWise.

12/31/13
Wise F&I ce transition of F&I Admin to support business initiatives.

Help = Access to User's Guide

Contact Us = Ways to Reach Us

Main Screen = Announcements to keep you up-to-date on changes and important information

WiseF&I

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Quote Screen > Save Quote

The screenshot shows the ONWise Quote screen with the following sections:

- Quote Header:** Plan Purchase Date (05/05/2014), F&I Manager (Amanda Miller).
- Customer (Name, Demo):** First Name (Demo), MI, Last Name (Name), Title, Address, Address 2, City, State (WA), ZIP, Primary Phone, Secondary Phone, Email, Alternate Contact, Language (English).
- Vehicle (2009/CHEVROLET/MALIBU LTZ):** VIN (1G1ZK57B394137180), Odometer, Mfg. Warr. Start Date, Veh. Purchase Price, Veh. Purchase Date, Attributes (2009/CHEVROLET/MALIBU LTZ/Car Mid-Size Non-Luxury Traditional Normal/4 Cyl/Front Wheel Drive/Gas), Stock #, Base Warranty, Powertrain Warranty.
- Loan/Lease:** Deal Type (Loan), Term (72), Finance Amt (\$20,000.00), MSRP, APR, Monthly Pmt, 1st Pmt Date, Balloon Amt, Residual Amt, Acct. #.
- Lienholder:** (Empty field)
- Products:** Load Template (GAP), Program (GAPWise), Type, Plan (GWFP2200), Term (72 months), Deductible, Retail (\$595.00).

At the bottom, there are buttons for **Save Quote**, **Print Quote**, **Close**, and **Cancel Changes**. The **Save Quote** button is highlighted with a red box, and a red arrow points from the text 'Click 'Save Quote'' to it.

From the **Quote** menu choose **'New'** from the dropdown to create a new Quote.

The following fields must be provided to save a quote:

- First Name
- Last Name
- VIN
- Deal Type
- Term
- Finance Amount

Click **'Save Quote'**

Note: Retail rate must be re-entered if quote is saved but not submitted.

Quote Screen > Print Quote (Optional)

ONWise™
Contract Administration

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller | Logout

Main **Quote** Contract Remittance Reports Settings

Quote

Plan Purchase Date: 05/05/2014
F&I Manager: Amanda Miller

Customer (Name, Demo)

First Name: MI
Demo:
Address:
Email:

Vehicle (2009/CHEVROLET/MALIBU)

VIN: 1G1ZK57B394137180
Odometer:

Attributes (2009/CHEVROLET/MALIBU)

Stock #:
Base Warranty:
Purchase Date: Apr 17, 2014

Loan/Lease

Deal Type: Loan
Term: 72
Finance Amount: \$20,000.00

Lienholder

Products

Product	Program	Plan	Options	Price
GAP	GAPWise	New APP FC101 Term: 72 months \$0		\$595.00
TOTAL				\$595.00

Printed By: Amanda Miller

Save Quote **Print Quote** Close Cancel Changes

From the **Quote screen** you can print the quote.

Click **'Print Quote'**

Quote Screen > Submit Quote

The screenshot shows the ONWise Quote screen. At the top, there is a navigation bar with 'Main', 'Quote', 'Contract', 'Remittance', 'Reports', and 'Settings'. The 'Quote' tab is active. Below the navigation bar, there are several sections: 'Quote' (Plan Purchase Date: 05/05/2014, F&I Manager: Amanda Miller), 'Customer (Name, Demo)' (First Name, MI, Last Name, Title, Address, City, State, ZIP, Primary Phone, Secondary Phone, Email, Alternate Contact, Language), 'Vehicle (2009 CHEVROLET MALIBU LTZ)' (VIN: 1G1ZK57B394137180, Odometer, Mfg. Warr. Start Date, Veh. Purchase Price, Veh. Purchase Date, Attributes, Stock #, Base Warranty, Powertrain Warranty), 'Loan/Lease' (Deal Type: Loan, Term: 72, Finance Amt: \$20,000.00, MSRP, APR, Monthly Pmt, 1st Pmt Date, Balloon Amt, Residual Amt, Acct. #), 'Lienholder', and 'Products' (Load Template: GAP, Program: GAPWise, Type, Plan: GWFP2200, Terms: 72 months, Deductible, Retail: \$595.00). A 'Submit' button is highlighted with a red box. Below the form, there is a message 'Quote saved successfully.' and buttons for 'Save Quote', 'Print Quote', 'Close', and 'Cancel Changes'.

To **submit a quote** and **create a contract** the following fields must be provided:*

- First Name
- Last Name
- Address
- City
- State
- Zip
- VIN
- Deal Type
- Term
- Finance Amount
- GAP Product
- Term
- Retail Price

Preview Contract
Click '**Submit**' to generate a contract.

ONLY SUBMIT VALID CONTRACTS. ALWAYS PREVIEW FIRST.

If edits or additional information is added, click '**Save Quote**' before '**Submit**'.

*Required fields vary by product. Additional fields may be required.

Quote Screen > Generate Contract PDF

The screenshot shows the ONWise Quote screen. At the top, there is a navigation bar with buttons for Main, Quote (selected), Contract, Remittance, Reports, and Settings. The Quote screen is divided into several sections: Plan Purchase Date (05/05/2014) and F&I Manager (Amanda Miller); Customer information (Name, Demo); Vehicle information (2009 CHEVROLET MALIBU LTZ) including VIN (1G1ZK57B394137180) and attributes; Loan/Lease details (Deal Type: Loan, Term: 72, Finance Amt: \$20,000.00); and Contracted Products. A table at the bottom lists the contracted products, with the first row showing Product: GAP, Program: GAPWise, Type: GWFP2200, Term: 72 months, Deductible: \$595.00, Retail: \$595.00, and a Contract Number: APPO000000068. A red box highlights the Contract Number, and a red arrow points from the text 'Click Contract Number to view the contract's general information screen.' to it. Another red box highlights a PDF icon, and a red arrow points from the text 'Click PDF icon to view the PDF of the contract.' to it.

Deal Type	Term	Finance Amt	MSRP	APR	Monthly Pmt	1 st Pmt Date	Balloon Amt	Residual Amt	Acct. #
Loan	72	\$20,000.00							

Product	Program	Type	Plan	Term	Deductible	Retail	Contract Number	PDF Icon
GAP	GAPWise	GWFP2200		72 months	\$595.00	\$595.00	APPO000000068	

After clicking 'Submit' a contract is generated as a PDF and can be printed for the customer's signature.

On the Quote screen, the contract will appear under Contracted Products.

Click **Contract Number** to view the contract's general information screen.

Click **PDF icon** to view the PDF of the contract.

Quote Screen > Void Contract

The screenshot shows the ONWise Quote screen. At the top, there is a navigation bar with buttons for Main, Quote (selected), Contract, Remittance, Reports, and Settings. The user is logged in as Amanda Miller. The main form contains sections for Customer, Vehicle, Loan/Lease, and Products. A table at the bottom shows a list of contracted products, with one row for 'GAP' where the 'Void' button is highlighted with a red box. A red arrow points from the text on the right to this 'Void' button.

Product	Program	Type	Plan	Term	Deductible	Retail	
GAP	GAPWise		GWFP2200	72 months		\$595.00	APP0.000000068 Void

After you submit a contract you may **'Void'** the contract.

You should void a contract when a customer chooses not to purchase the product. You may also void a contract and start over if the contract data is incorrect.

Note: You may not void a contract after it has been Remitted.

Quote Screen > Search

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller | Logout

Main Quote Contract Remittance Reports Settings

Filters
Search By: F&I Manager Amanda Miller Search Add New
Plan Purchase Date From: 05/05/2014 To: 05/05/2014

Quotes
<< Prev Page 1 of 1 Next >> Records Per Page: 25

Customer Name, Demo	VIN	Year/Make/Model	Plan Purchase Date	F&I Manager	Product	Stock #	Edit
	94137180	2009 CHEVROLET MALIBU LTZ	05/05/2014	Amanda Miller	GAP		

<< Prev Page 1 of 1 Next >> Records Per Page: 25

From the **Quote menu** choose '**Search**' from the dropdown.

Search By:

- Customer Last Name
- VIN
- Year/Make/Model
- Stock Number
- Plan Purchase Date

Click on the **VIN link** to view the Quote screen.

From here you can click the **Contract Number** to go to the contract general information screen, or click the **PDF icon** to view the contract.

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller | Logout

Main Quote Contract Remittance Reports Settings

Quote
Plan Purchase Date: 05/05/2014 F&I Manager: Amanda Miller
Customer (Name, Demo):
First Name: MI Last Name: Title:
Demo: Name:
Address: Address 2: City: State: ZIP: Primary Phone: Secondary Phone:
1670 Fenpark Drive St. Louis MO 63006
Email: Alternate Contact: Language: English
Vehicle (2009CHEVROLETMALIBU LTZ)
VIN: 1012K57B394137180 Odometer: Milg. Warr. Start Date: Veh. Purchase Price: Veh. Purchase Date:
Attributes (2009CHEVROLETMALIBU LTZ/Car Mid-Size Non-Luxury Traditional/Normal 4 Cyl/Front Wheel Drive/Gas)
Stock #: Base Warranty: Powertrain Warranty:
Loan/Lease
Deal Type: Term: Finance %: MSRP: APR: Monthly Paid: 1st Paid Date: Balloon Amt: Residual Amt: Acct. #:
Loan: 72 \$20,000.00
Lienholder:
Products
Contracts have been identified for all available products
Contracted Products
Product: Program: Type: Plan: Term: Deductible: Retail:
GAP: GAPIns: Type: GWFF200: 72 months: \$500.00: \$15,000.000000
Save Quote Print Quote Close

Note: Click the column titles in the black bar to sort the search results in ascending or descending order.

Contract Screen > Search

22741-509 - DEALERSHIP NAME

ONWise™ Contract Administration

Main Quote **Contract** Remittance Reports Settings

Search By: F&I Manager Amanda Miller Search **Advanced Search**

Sale Date: 04/17/2014 To: 05/05/2014

Contract List

Void	Customer	VIN	Purchase Date	Product	Contract #	Term*	Retail/Edt
<input type="checkbox"/>	Name, Demo	1G1ZK57B394137180	05/05/2014	GAP	P APP000000068	72	\$595.00
<input type="checkbox"/>	Name, Demo	1G1ZK57B394137180	04/23/2014	GAP	PS APP000000051	72	\$595.00
<input type="checkbox"/>	Name, Demo	1G1ZK57B394137180	04/17/2014	GAP	V APP000000048	72	\$595.00

Status: **P** - Pending **PS** - Pending-Billed **A** - Active **V** - Void **C** - Cancelled **E** - Expired **R** - Rejected

Search By:

- Status*
- Product
- F&I Manager
- Contract #
- VIN
- Customer Last Name
- Customer First Name
- City
- State
- Zip Code
- Sale Date

*Status Symbol Definition:

- P** Pending: Submitted but NOT Remitted
- PS** Pending Billed: Submitted AND Remitted
- A** Active: Submitted, Remitted AND Paid
- V** Void: Voided Contract
- C** Cancelled: Contract Cancelled
- E** Expired: Contract Term Expired
- R** Rejected: Contract Rejected (Beyond Underwriting Limits)

Advanced Search:

Use this to search by a combination of fields.

Note: Click 'Customer' or 'Purchase Date' in the black bar to sort the search results in ascending or descending order.

Contract Screen > Contract Info

The screenshot shows the ONWise Contract Administration interface. At the top, there is a navigation bar with tabs for Main, Quote, Contract, Remittance, Reports, and Settings. The 'Contract' tab is selected. The main content area is divided into two sections: 'General Information' and 'Financial Information'. The 'General Information' section includes fields for Purchase Date (05/05/2014), Mfg. Warr. Start Date, Seller (Amanda Miller), F&I Manager (Amanda Miller), Stock #, Deal Type (Loan), and Lienholder (Edit Lienholder). It also includes Customer Name (Name, Demo), Address (1670 Fenpark Drive, St. Louis, MO 63026), Vehicle (1G1ZK57B394137180), Sale Odometer (0), and Veh. Purchase Date. The 'Financial Information' section includes Plan Type (New), Program (GAPWise), Plan Name (GWFP2200), Term (72), APR, Amount Financed (\$20,000.00), Retail (\$595.00), First Payment Date, Monthly Payment, Balloon Amount, Residual Amount, Account Number, MSRP, Payment Option (Single Pay), and Effective Date (05/05/2014 - 05/05/2020). At the bottom of the screen, there are three buttons: 'Re-generate Contract' (highlighted with a red box), 'Cancellation Quote', and 'Void Contract'. A red arrow points from the 'Re-generate Contract' button to the text below.

Click the Contract # from the search list to view the general information for that contract.

From this screen you can:

- Edit Lienholder (If contract is Pending)
- Edit Customer Information* (If contract is Pending)
- View the Contract and Print
- Re-generate Contract
- Void Contract

Re-generate Contract: If a change is made, the contract must be Re-generated to update the PDF with the changed information.

*The Customer Name cannot be changed. If you need to edit the customer name, please contact Client Services or void the contract and start over.

Contract Screen > Void Contract

The screenshot shows the ONWise Contract Administration interface. At the top, there is a header with the ONWise logo, the dealership name '22741-509 - DEALERSHIP NAME', and user information 'Welcome Amanda Miller'. Below the header is a navigation menu with buttons for 'Main', 'Quote', 'Contract', 'Remittance', 'Reports', and 'Settings'. The main content area is divided into two sections: 'General Information' and 'Contract Details'. The 'General Information' section includes fields for Purchase Date, Mfg. Warr. Start Date, Seller, F&I Manager, Stock #, Deal Type, Lienholder, Customer Name, Address, Primary/Secondary Phone, Email, Language, Alt. Contact, Vehicle, Sale Odometer, and Veh. Purchase Date. The 'Contract Details' section includes Plan Type, Program, Plan Name, Added Options, Term, APR, Amount Financed, Retail, First Payment Date, Monthly Payment, Balloon Amount, Residual Amount, Account Number, MSRP, Payment Option, and Effective Date. At the bottom of the contract details section, there are three buttons: 'Re-generate Contract', 'Cancellation Quote', and 'Void Contract'. The 'Void Contract' button is highlighted with a red box. A red line points from the text on the right to this button.

Click **'Void Contract'** and confirm you would like to void the contract.

Once you **'Confirm Void'** the copy of the contract will have the word VOID across it.

The status symbol will change to V.

You can only void **Pending P** contracts.

Once a contract has been remitted you may not void the contract. Contact Client Services to cancel a remitted contract.

V Void: Voided Contract

Contract Screen > Cancellation Quote

The screenshot displays the ONWise Contract Administration interface. At the top, there is a navigation menu with options: Main, Quote, Contract, Remittance, Reports, and Settings. The 'Contract' option is selected. The main content area is titled 'General Information' and contains the following data:

Purchase Date:	12/14/2013	Customer Name:	Sample, Sample	Vehicle:	5J6RM4H31EL022901
Mfg. Warr. Start Date:		Address:	1670 Fenpark		2014 HONDA CR-V LX
Seller:			St. Louis, MO 63026	Sale Odometer:	138
F&I Manager:		Primary Ph.:		Veh. Purchase Date:	12/14/2013
Stock #:		Secondary Ph.:			
Deal Type:	Loan	Email:			
Lienholder:		Language:	EN		
		Alt. Contact:			

Below the general information, there is a section for financial details:

Plan Type:	New	Term:	60	APR:	1.90%	Amount Financed:	\$25,800.58	Retail:	\$595.00
Program:	GAPWise	First Payment Date:		Monthly Payment:		Balloon Amount:			
Plan Name:	GWFP2200	Residual Amount:		Account Number:		MSRP:			
Added Options:		Payment Option:	Single Pay						
Covered Components		Effective Date:	12/14/2013 - 12/14/2018						

At the bottom of the screen, there are three buttons: 'Re-generate Contract', 'Cancellation Quote' (highlighted with a red box), and 'Void Contract'. A red arrow points from the text on the right to the 'Cancellation Quote' button.

Only **ACTIVE** contracts can be cancelled.

After choosing an **ACTIVE** contract from the Contract screen, click '**Cancellation Quote**' to calculate the cancellation amount.

A Active: Submitted, Remitted AND Paid

Contract Screen > Cancellation Quote

ONWise™ Contract Administration
22741-509 - DEALERSHIP NAME
Welcome Amanda Miller | [Help](#) | [Contact Us](#) | [Logout](#)

Main | Quote | **Contract** | Remittance | Reports | Settings

Contract Information [Back To Contract](#)

Contract #: APP567577
Sale Date: 12/14/2013
Customer: Sample, Sample
Seller: Dealership Name
Lienholder: Lienholder

Cancellation Information

Cancel Date:
Cancel Odometer:
Cancel Reason:

Cancellation Rates

Orig. Retail Cost:	
Orig. Net Cost:	
Non Ref. fee (Customer):	
Cancellation Fee:	
Net Refund From Admin.:	
Refund From Seller:	
Cancellation Refund Amount:	

Discard Changes | **Calculate** | Save Quote | Cancel Contract | Cancellation Report: | Print

Cancellation quotes are calculated based on the mileage of the vehicle or the time period the contract has been in force and are subject to change due to increases in mileage or time.

If the administrator has notice of a lienholder or lessor and a discharge of lien is not provided, any refund will be issued jointly to the customer and the lienholder/lessor.

Under Cancellation Information you will need to input:

- Cancel Date
- Cancel Odometer*
- Cancel Reason

Click **'Calculate'** to calculate and view cancellation rates.

*For GAP, Odometer entry is required and must be higher than the original contract amount. If unknown, use 500,000.

Contract Screen > Cancellation Quote

ONWise™
Contract Administration

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller Logout

Main Quote Contract Remittance Reports Settings

Contract Information [Back To Contract](#)

Contract #: APP567577
Sale Date: 12/14/2013
Customer: Sample, Sample
Seller: Dealership Name
Lienholder: Lienholder

Cancellation Information

Cancel Date: 05/05/2014
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

Orig. Retail Cost:	\$595.00	FACTORS	
Orig. Net Cost:		Term (%):	92.223
Non Ref. fee (Customer):	\$0.00	Mileage (%):	0.000
Cancellation Fee:	(\$50.00)	Calc Method:	
Net Refund From Admin.:			
Refund From Seller:			
Cancellation Refund Amount:	\$498.73		

Discard Changes Calculate **Save Quote** Cancel Contract Cancellation Report: Print

Cancellation quotes are calculated based on the mileage of the vehicle or the time period the contract has been in force and are subject to change due to increases in mileage or time.

If the administrator has notice of a lienholder or lessor and a discharge of lien is not provided, any refund will be issued jointly to the customer and the lienholder/lessor.

Once the calculation is made click **'Save Quote'**.

Contract Screen > Cancellation Quote

ONWise™
Contract Administration

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller Logout

Main Quote Contract Remittance Reports Settings

Contract Information [Back To Contract](#)

Contract #: APP567577
Sale Date: 12/14/2013
Customer: Sample, Sample
Seller: Dealership Name
Lienholder: Lienholder

Cancellation Information

Cancel Date: 05/05/2014
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

	FACTORS	Term (%)
Orig. Retail Cost	\$595.00	92.223

CANCELLATION QUOTE WORKSHEET

Contract Information

Contract Number	APP567577	Sale Date	12/14/2013
Customer Last Name		Seller Name	
Customer First Name		Seller ID	
VIN	S16RMAH31E022901	Lienholder	American Honda Finance Corp
Vehicle Year	2014		
Vehicle Make	HONDA		
Vehicle Model	CR-V LX		

Cancellation Information

Cancel Date	05/05/2014	Term Refund Factor	92.223 %
Cancel Reason	Paid Off Vehicle	Cancel Odometer	40000
		Mileage Refund Factor	0.000 %

Refund Information

Orig. Retail Cost	\$595.00
Orig. Net Cost	
Non-refundable Fee	\$0.00
Cancellation Fee	(\$50.00)
Net Refund from Provider	
Refund from Seller	
Cancellation Refund Amount	\$498.73

Customer Refund

Amount Due Customer	\$498.73
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Disclaimer

Please Note: This contract cancellation quote reflects current information as of today and is subject to change daily. No cancellation will be processed until a proper request has been submitted in writing via fax to 836-600-4426. If you have any questions regarding the cancellation process, please contact Client Services at 800-849-9555.

Quote saved

Cancellation mileage or title fee

If the administrator

Cancellation Report: Cancellation Quote Worksheet - Dvw Print

After you click **'Save Quote'** a cancellation quote worksheet will be created.

Click **'Print'** to print the cancellation quote worksheet.

Printed cancellation quote worksheet and supporting documentation should be submitted to Wise F&I via fax to 636-600-4426.

Remittance Screen > Create

ONWise™ Contract Administration

22741-509 - DEALERSHIP NAME

Help | Contact Us
Welcome Amanda Miller Logout

Main Quote Contract **Remittance** Reports Settings

Create Remittance

Product: **GAP** Program: ALL Contract Count: 0
Lienholder: ANY Plan Purchase Date: ALL DATES Total Remit: \$0.00

Filter

[Include This Page](#) [Exclude This Page](#) [Include All Pages](#) [Exclude All Pages](#)

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Remit
<input type="checkbox"/>	Sample, Sample	1GC2KXCG2CZ300627	04/16/2014	APPQ00000047		72		\$198.00

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[Preview Remittance](#) [Download All to Spreadsheet](#) **Save** **Submit**

From the **Remittance Menu** choose **'Create'** from the dropdown. All pending contracts will be listed.

Check the contracts to remit then click **'Save'**.

Click **'Submit'** to remit selected contracts, print out the Remittance page and send along with payment to Wise F&I.

Click **'Preview Remittance'** to view a PDF.

Choose product type to remit.

Note: No edits can be made once a contract is remitted. Contact Client Services to make any changes.

Once a contract is remitted the status symbol will change to:
Ⓟ Pending Billed.

Once the remittance is sent and payment is applied, the status symbol will change to: ⓐ Active.

Remittance Screen > Search

22741-509 - DEALERSHIP NAME

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Welcome Amanda Miller Logout

Main Quote Contract **Remittance** Reports Settings

Remittance Search

Remittance #: Remittance Search: Automatic and Manual

Product Type: GAP

Submission Date: CURRENT MONTH From: 05/01/2014 To: 05/31/2014 Filter

Remittances

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Submission Date	Cycle Month	Remittance Number	Product	Contract Count	Total Remit	Reprint
05/02/2014	March 2014	22741-509-005	GAP	1	\$198.00	
05/02/2014	March 2014	22741-509-004	GAP	1	\$223.00	

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On the **Remittance menu** choose **'Search'** from the dropdown.

Search By:

- Remittance #
- Product Type
- Submission Date

Note: Clicking 'Submission Date' or 'Cycle Month' in the black bar will sort the search results in ascending or descending order.

Reports Screen



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REPORTS
TO COME**

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HERE TO HELP**

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Please contact our Client Services Team and ask for *ONWise Support*.

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

Live phone support Monday - Friday,
8:00 am - 7:00 pm CST

WiseF&I[®]