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





Phone: 800-849-9559 | Email: ClientServices@WiseFandl.com | www.ONWise.com

ONWISE Contract Administration

USER

REFERENCE

GUIDE

WELCOME TO

User Role: F&I Manager

HELP IS HERE

Phone: 800-849-9559 Email: ClientServices@WiseFandl.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 <u>ONWise.com</u> 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.



Quote Screen > Create/Save Quote

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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
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The following fields are required for rating:

- Odometer
- Deal Type (GAP)
- Term (GAP)
- Finance Amount (GAP)

Click 'Save Quote'

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



Quote Screen > Print Quote (Optional)

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To submit a quote and create a contract

the following fields must be provided:*

- First Name
- Last Name
- Address
- City
- State
- Zip
- VIN
- Odometer
- Additional Info.(AP, ETCH, KEY, TW)
- Deal Type (GAP)
- Term (GAP)
- Finance Amount (GAP)
- Product
- Term
- Retail Price

Preview Contract() Click 'Submit' to generate a contract.

Wise F&

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.

F&I Manager

Quote Screen > Generate Contract PDF

| | Wio | S ^M | 22741-509 - DEALEF | RSHIP NAME | | * | Help Contact Us Welcome Amanda Miller Logout |
|------------|------------------|-----------------------------|----------------------|----------------------|--------------------------|--------------------|---|
| | WIS | Main Q | uote 🔻 Contract | Remittance | ▼ Reports | Settings | |
| Co | ntract Administr | ation | uole 🕴 Contract | Relinitiance | Reports | Settings | |
| Quote | | | | | | | |
| Plan Purch | | F&I Manager | | | | | |
| 04/21/2 | | Amanda Miller | | ▼ | | | |
| | er (Name, De | | | | | | |
| FirstName | e | MI | LastName | Title | | | |
| Demo | | | Name | | Ŧ | | |
| Address | | Address 2 | City | State | | Primary Phone | Secondary Phone |
| 1670 Fenp | ark Drive | | St. Louis | MO | ▼ 63026 | | |
| Email | | Alternate Contact | Language | | | | |
| | | | English 🔻 | | | | |
| | (2009/CHEVR | OLET/MALIBULTZ) | | | | | |
| VIN | | Odometer Mf | ig. Warr. Start Date | Veh. Purchase P | rice Veh. Purchas | se Date | |
| 1G1ZK57B | 3394137180 | | | | | | |
| Attribute: | s (2009/CHE) | ROLET/MALIBU LTZ/ | Car Mid-Size Non-Lux | ury Traditional/Norm | al/4 Gyl/Front Whe | el Drive/Gas) | |
| Stock # | Base War | ranty Powertrain \ | Warranty | | | | |
| E Loan/Lea | ase | | | | | | |
| Deal Type | Term | Finance Amt MS | SRP APR | Monthly Pmt | 1 st Pmt Date | Balloon Amt Re | esidual Amt Acct. # |
| Loan | | \$20,000.00 | | | | | |
| I Lienhold | | | | | | | |
| ■ Products | | | | | | | |
| Load Temp | | T | Clear Template | | | | |
| Loau Temp | | | | T | Destudible | Datail | |
| | Program | Туре | Plan | Term | Deductible | | |
| | | | | | | \$0.00 | |
| | | itted for all available pro | oducts. | | | | |
| Contract | ed Products | | | | | | |
| Product | Program | Туре | Plan | Term | Deductible | Retail | |
| | | | | | | | |
| GAP | GAPWise | | GWFP2200 | 72 months | | \$595.00 APF | PQ0000068 Void 🖉 |
| GAP | GAPWise | | GWFP2200 | 72 months | | \$595.00 <u>AP</u> | PQ0000068 Void |
| GAP | GAPWise | | GWFP2200 | 72 months | | \$595.00 AP | |
| GAP | GAPWise | | GWFP2200 | 72 months | | | 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

| ONWico | 999999-ONW - ONWIS | E MOTORS | * | Help Contact Us Welcome Ashley Perry Logout |
|---|--|---|---|--|
| Contract Administration Main | Quote Contract | Remittance Claims | Reports Settings | |
| uote Search | | | | |
| Search By: Customer Last Name | ~ | Sea ch Add Nev | N | |
| Plan Purchase Date From: 04/21/2022 | To: 04/21/2022 | | | |
| otes List | | | | |
| | | | | 1 Next >> Records Per Page: 25 V |
| tomer vin Asset Type/Year/Mal st, Tes <u>MG056993</u> Passenger Car 20 | | | Sales Associate Product AP, Etch, G/ | Stock # Deal # Ed |
| | _ | | << Prev Page 1 🗸 of | 1 Next >> Records Per Page: 25 |
| lick on the | Contract Administration | 999999-ONW - ONWISE MO Main Quote Contract Rer | nittance Claims Reports Setti | Help [ContectUs Welcome Ashley Perry Logous ings |
| N link to view the | | n Purchase Date F&I Manager/Sal 21/2022 Liz Wesche | es Associate | |
| uote screen. | Customer (Test, Test) First Name MI Test Address Ad I23 Test Way | Last Name Test Idress 2 City Test | Title | |
| rom here you can | Email Alt Test@gmail.com | ternate Contact Language English V | | |
| ick the Contract | VIN 5XXG64J25MG056993 | Odometer Mfg. Warr. Start Date Ve | h. Purchase Price Veh. Purchase Date Au 46,000.00 04/21/2022 * | to Code Ownership |
| umber to go | Attributes (Passenge Stock # Base Warranty | er Car/2021/KIA/K5/GT LINE/Turbocharged/Seda | n/4 Cylinders/Front Wheel Drive/98 CID / 1.6 L/C | |
| the contract | 60 / 60,000 | 120 / 100,000 | | |
| eneral information | | ance Amt MSRP NADA 009.00 \$46,000.00 \$46,000.00 | APR Monthly Pmt 1 st Pmt D | ate Balloon Amt Residual Amt |
| creen, or click the | The products | Clear Template | | |
| DF icon to view — | Program | Type Plan Term | Deductible 🕨 Retail (excl.taxes) | |
| e contract. | Contracts have been submitted f | racted Products | | |
| | Product Program VSC WiseTVP | Type Plan Used TVP Supreme | Term Deduckble Retail 48/48,000 \$100 \$8,500.00 V | /TVPQ00747563 Reprint Paylink RK |
| | GAP GAPWise 150 | GAPWise Core 150GWTX FG1 | and the second se | 50GWTXQ00747566 |
| | AP WiseAPPEARANCE 5V KEY KEYWise | NA V1 New WiseAPPEAR ANCE - 5WA V1 New KEYWise - KW FG5000 | | WAQ00747567 E |
| | TW TIDEWise STW | New TIREWise - STW EG8010 | 60/000 000 \$0 \$405 00 S | TWO00747569 |

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

Search By:

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

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



Status Symbol Definition

- Pending: Submitted but NOT Remitted
- Pending Billed: Submitted AND Remitted
- Active: Submitted, Remitted AND Paid
- Void: Voided Contract
- Cancelled: Contract Cancelled
- E Expired: Contract Term Expired
- Rejected: Contract Rejected (Beyond Underwriting Limits)





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

Phone: 800-849-9559 Email: ClientServices@WiseFandl.com

Live phone support Monday - Friday, 8:00 am - 6:00 pm CST



ONWISE Contract Administration

USER

REFERENCE

GUIDE

WELCOME TO

User Role: Back Office Manager

HELP IS HERE

Phone: 800-849-9559 Email: ClientServices@WiseFandl.com www.ONWise.com







ONWise Contract Administration Portal is your online resource to:

• View and Void Contracts

Retrieve/View Billing Statements

Remit Contracts

Obtain Cancellation Quotes

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

Getting Started

- Go to <u>ONWise.com</u> 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.



Contract Search Screen

| | Wice | 010-66666 | NW - ONWISE | MOTORS | | | | | Welcome Ashley Perry Log |
|--|---|--|---------------------------------|---|---|---|--------------------|--|--|
| Con | tract Administration | Quote 🔻 | Contract | Remittance | Claims | Reports | Settings | | |
| Contract Sea | rch | | | | | | | | |
| o search for | contracts sold outside this d | ealershin nleas | se use Contra | ct# or VIN# | | | | | |
| Search By: | Customer Last Na | ame 🗸 | | | S | earch Adv | anced Searc | h | |
| Sale Date | ✔ 04/21/2022 | | To: 05/06/20 | 122 | | | 1 | | |
| Daymont Pla | n Provider Any | ~ | 8 | | | | | | |
| aymentilla | in lotion reg | | | | | | · · · · · | | |
| contract List | | | | | | | | | |
| | | | | | | << P | rev Page 1 | of 1 Next > | » Records Per Page: 25 |
| ontract List | VIN | Purchase D | ale Produ | uct Contract (| # | << P | | of 1 Next⇒ Retail | >> Records Per Page: 25 Payment Plan Provider |
| contract List | | Purchase D 04/21/202 | | | # 00747563 | (mhia)) | | | |
| | VIN | | 2 VSC | P WTVPQ | | Term 48/4 | | Retail | Payment Plan Provider |
| Customer Test, Test | VIN 5XXG64J25MGD56993 | 04/21/202 | 2 VSC 2 GAP | P WTVPQ 150GW1 | 00747563 | Tem 48/4 <u>66</u> 72 | | Retail \$2,500.00 | Payment Plan Provider |
| Customer Test, Test Test, Test | VIN 5XXG64J25MGD56993 5XXG64J25MGD56993 | 04/21/202 | 2 VSC 2 GAP 2 AP | P <u>WTVPQ</u> P <u>150GW1</u> P <u>5WAQ0</u> | 00747563 TXQ0074756 0747567 | Tem 48/4 66 72 60/9 | 18 | Retail \$2,500.00 \$795.00 | Payment Plan Provider |
| Customer Test, Test Test, Test Test, Test | VIN 5XXG64J25MGD56993 5XXG64J25MGD56993 5XXG64J25MGD56993 | 04/21/202 04/21/202 04/21/202 | 2 VSC 2 GAP 2 AP 2 KEY | | 00747563 TXQ0074756 0747567 | Term 48/4 66 72 60/9 60/9 | 18 199.999 | Retail \$2,500.00 \$795.00 \$500.00 | Payment Plan Provider |
| Customer Test, Test Test, Test Test, Test Test, Test Test, Test | VIN 5XXG64J25MGD56993 5XXG64J25MGD56993 5XXG64J25MGD56993 5XXG64J25MGD56993 | 04/21/202 04/21/202 04/21/202 04/21/202 | 2 VSC 2 GAP 2 AP 2 KEY | | 00747563 TXQ0074756 0747567 747568 | Term 48/4 66 72 60/9 60/9 60/9 | 199.999 199.999 | Retail \$2,500.00 \$795.00 \$500.00 \$300.00 \$495.00 | Payment Plan Provider Paylink |

*Status Symbol Definition:

- Pending: Submitted but NOT Remitted
- Pending Billed: Submitted AND Remitted
- Active: Submitted, Remitted AND Paid
- Void: Voided Contract
- C Cancelled: Contract Cancelled
- E Expired: Contract Term Expired
- 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.

Search By:

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



Contract Screen > Contract Info

| Cont | tract Administ | Main Q | uote 🔻 Con | illagi Heim | ittance Claims | Reports | Settings | |
|---|---|---|---|---|--|---------|---|---|
| General Info | rmation | | | | | | | Back to Search |
| Purchase Da Mfg. Warr. S Seller: F&I Manage Associate: Recipient ID Stock #: Lienholder: Group: | ate Start Date: r/Sales | 04/21/2022 ONWise Motors Liz Wesche Quote PayLink Direct Edit Lienholder | Address Primary Seconda Email: Languag Alt. Con | Ph.: ary Ph.: ge: | Test, Test 123 Test Way Test, TX 12345 (123) 456-7890 Test@gmail.com EN | Sak | icle: e Odometer: I. Purchase Dat nership: | 5XXG64J25MG056993 Attributes Passenger Car 2021 KIA K5 GT LINE 45,234 e: 04/21/2022 |
| | | | | | | | | |
| | Contract (V Used | /TVPQ00747563) { | Pending 🕑 Term: 48 | Miles/ | km: 48,000 Ded: \$100 |) Ret | ail (excl. taxes) | : \$2,500.00 ▼ |
| Service Plan Type: Program: Plan Name: | Used WiseTVP | | Term: 48 Payment | | km: 48,000 Ded: \$100 |) Ret | ail (excl. taxes) | : \$2,500.00 v |
| Plan Type: Program: | Used WiseTVP TVP Supr | eme AWD, Turbo, | Term: 48 Payment | Single Pay 04/21/202 45,234 - 9 | 22 - 04/21/2026 93,234 18 mos, 5%/\$125.00 c | | ail (excl. taxes) | : \$2,500.00 ▼ |
| Plan Type: Program: Plan Name: Added | Used WiseTVP TVP Supr | eme AWD, Turbo, | Term: 48 Payment Option: Effective Date: Effective Odom: Payment | Single Pay 04/21/202 45,234 - 9 Paylink - | 22 - 04/21/2026 93,234 18 mos, 5%/\$125.00 c | | ail (excl. taxes) | : \$2,500.00 ▼ |
| Plan Type: Program: Plan Name: Added Options: | Used WiseTVP TVP Supr TVP 4WD Superchar | eme AWD, Turbo, | Term: 48 Payment Option: Effective Date: Effective Odom: Payment | Single Pay 04/21/202 45,234 - 9 Paylink - | 22 - 04/21/2026 93,234 18 mos, 5%/\$125.00 c | | ail (excl. taxes) | : \$2,500.00 ▼ |

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.

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

Vise -

- Re-generate
 Contract
- Void Contract



Contract Screen > Void Contract

| Cont | ract Administ | ration Main Qu | iote 🔻 Con | ntract Rem | nittance Claims I | Reports | Settings | | | |
|--|--|--|---|---|--|---------|---------------------------------------|---------------------------------|------------|---------------------|
| General Info | mation | | | | | | | | Bask | io Search |
| Purchase Da Mfg. Warr. S | Concerned and | 04/21/2022 | Custom Address | nerName: s: | Test, Test 123 Test Way | Vehic | cle: | 5XXG64J25M Passenger C | | Attributes (5 GT |
| Seller: F&I Manager Associate: Recipient ID Stock #: | | ON Wise Motors Liz Wesche Quote | Primary Second Email: Langua | lary Ph.: | Test, TX 12345 (123) 456-7890 Test@gmail.com EN | Veh. | Odometer: Purchase Date ership: | LINE 45,234 :: 04/21/2022 | | |
| Lienholder: | | PayLink Direct Edit Lienholder | Alt. Cor | ntact: | | | | | | 1 |
| Group: | | | · | tomer Informatio | <u>n</u> | | | | | |
| Group: | | VTVPQ00747563) P | ending 💿 | | | Beta | il (excl. taxes): | s | 2.500.00 🔻 | |
| Group: Service Plan Type: Program: | Used WiseTVP | VTVPQ00747563) P | | Miles Single | ≌ /km: 48,000 Ded: \$100 | Reta | il (excl. taxes): | \$ | 2,500.00 ¥ | |
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| Group: Service Plan Type: Program: Plan Name: | Used WiseTVP TVP Supr TVP 4WD | VTVPQ00747563) P eme , AWD, Turbo, | ending Term: 48 Payment Option: Effective | Miles Single Pay | /km: 48,000 Ded: \$100 22 - 04/21/2026 | Reta | il (excl. taxes): | \$ | 2,500.00 ¥ | |
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Void: Voided Contract

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

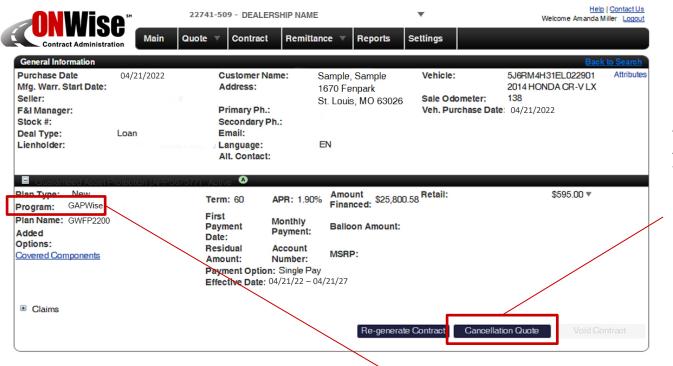
Once you **'Confirm Void'** the copy of the contract will have the word VOID across it.

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.





Only ACTIVE contracts can be cancelled.

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

A ctive: Submitted, Remitted AND Paid

NOTE: The Contract screen will autofill the correct program to be cancelled. To verify, look at the '**Program'** line.



Back Office Manager

| | | 2 | 22741-5 | 09 - | DEALE | RSHIP | NAME | | * | | Welcome An | <u>Help Co</u> nanda Miller | |
|---|---------------------|--|--------------------------------|---------------------|---------------------------------|-------|-------------|---------|-----------------|-----------|-------------|----------------------------------|---------------|
| Contract Administration | Main | QI | uote 🤻 | Co | ontract | R | emittance 🔻 | Reports | Settings | | | | |
| Contract Information | | | | | | | | | | | | Back To C | ontract |
| Contract #: Sale Date: Customer: Seller: Lienholder: Cancellation Information | 04/2 Sam Deal | 2567577 21/2022 nple, Sar lership N holder | mple | nance | e Corp | | | | | | | | |
| Cancel Date: | | | | | | |] | | | | | | |
| Cancel Odometer: Cancel Reason: | 0 Su | | ▼ 2 Tu We | 022 [Th | D Fr Sa | |] | | | | | | |
| Cancellation Rates | | | | 1 | 2 3 | | | | | | | | |
| Orig. Retail Cost: Orig. Net Cost: Non Ref. fee (Customer): Cancellation Fee: Net Refund From Admin.: Refund From Seller: Cancellation Refund Amount: | 4 11 18 25 | 12 19 | 6 7 13 14 20 21 27 28 | 8 15 22 29 | 9 10 16 17 23 24 30 31 | | × | | | | | | |
| Discard Ghanges | - | Calculate | _ | | e Quote ne vehic | | Gancel Cor | | Cancellation Re | ect to ch | ange due to | increase | Print s 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.



| ONWISE * | 22741 | -509 - DEALERSH | IP NAME | | • | Help Contact Us Welcome Amanda Miller Logout |
|---|---|------------------------------|-----------------|---------|-----------------|---|
| Contract Administration | Main Quote | Contract | Remittance 🔻 | Reports | Settings | |
| Contract Information | | | | | | Back To Contract |
| Contract #: | APP567577 | | | | | |
| Sale Date: | 04/21/2022 | | | | | |
| Customer: | Sample, Sample | | | | | |
| Seller: | Dealership Name | | | | | |
| Lienholder: | Lienholder | | | | | |
| Cancellation Information | | | | | | |
| Cancel Date: | 105/05/2022 | | | | | |
| Cancel Odometer: | | 40,0 | 000 | | | |
| Cancel Reason: | Paid Off Vehicle | | | • | | |
| Cancellation Rates | | | | | | |
| Orig. Retail Cost: Orig. Net Cost: Non Ref. fee (Customer): Cancellation Fee: Net Refund From Admin.: Refund From Seller: Cancellation Refund Amount: | \$595.00 \$0.00 (\$50.00) \$498.73 | Mileage (%): Calc Method: | 92.223 0.000 | | | |
| Discard Changes | Calculate | Save Quote | Gancel Gor | ntract | Cancellation Re | eport: |
| mileage or time. | | | | | | and are subject to change due to increases in |

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



Back Office Manager

| | Wico | 22741 | -509 - DEALERS | HIP NAME | | Ŧ | Help Contact Us Welcome Amanda Miller Logout |
|--|---|--|---|-----------------|---------|----------|--|
| Cont | ract Administration | Main Quote | Contract | Remittance 🔻 | Reports | Settings | |
| Contract Info | ormation | , | | , | | , | Back To Contract |
| Contract #: Sale Date: Customer: Seller: Lienholder: | | APP567577 04/21/2022 Sample, Sample Dealership Name Lienholder | Dates - Cury | | | | |
| Cancellation I | nformation | | | | | | |
| Cancel Date Cancel Odo Cancel Reas Cancellation R | meter: son: | 05/05/2022 Paid Off Vehicle | 40, | 000 | × | | |
| Orig. Retai | Cost | \$595.00 | FACTORS Term (%): | 92.223 | | | |
| Orig. Net (Non Ref. f Cancellatii Net Refun Refund Fr Cancellatii Quote savec | CANCELLATION QUOT Contract Information Contract Number APP567577 Customer Last Name Customer First Name VIN 5.06RMAH31EL022901 Vehicle Year 2014 Vehicle Madel CR-V LX Cancellation Information Cancel Date 05/05/2014 | E WORKSHEET | Sale Date 04/21/2022 Seller Name Seller ID Lienholder American Hon | da Finance Corp | | | eport: Cancellation Quote Worksheet - Dtv Print e and are subject to change due to increases in |
| mileage or ti If the admini | Cancel Reason Paid Off Vehicle | | Cancel Odometer 40000 Mileage Refund Factor 0.00 | | | | d jointly to the customer and the lienholder/lessor. |
| | Refund Information Orig. Retail Cost Orig. Net Cost Non-refundable Fee Cancellation Fee Net Refund from Provider Refund from Seller Cancellation Refund Amount Customer Refund Amount Due Customer Disclaimer Please Note: This contract cancellati processed unli a proper reguest has | | | | | | |

Back Office Manager

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.

Wise **F**&

Remittance Screen > Create

| ONWise " | 22741-509 - D | EALERSHIP NA | ME | Ŧ | | Welcon | <u>Help</u> ne Amanda Mil | <u>Contact Us</u> Iler <u>Logout</u> |
|--|-------------------------------------|------------------|-----------------|--------------------------------------|--------------|----------------|------------------------------|---|
| Contract Administration | Main Contract Re | mittance 🔻 | Reports Setting | gs | | | | |
| Create Remittance | | | | | | | | |
| Product: OGAP CEtch | Program: ALL | Ŧ | | Due From TOTAL | Contr | act Count 0 | Remit Du | \$0.00 |
| Lienholder: ANY | Plan Purchase ALL DATES Date: | ¥ | | | | | | |
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| Contracts | | 04/ | 21/2022 | | | | | |
| Include Customer | VIN | Purchase Date | Contract # | Plan Description | Term Lien | holder | Total Contract Due | Due From |
| Sample, Test | 5TFJX4GN1DX020098 | 05/25/2022 | 150EPQF00768190 | EquityProtect Core 150EP FG122 | 66 ME BAN | CHANICS NK | \$198.00 | Seller- 21625- 351 |
| | | | | << Prev Pa | age 🚺 🔹 of | 1 Next >> Reco | rds Per Page | : 50 💌 |
| Preview Remittance | pad All to Spreadsheet | | | | | Sa | ve S | ubmit |
| Choose proc | luct type to | remit. | | | | | | |
| Note: No edit Contact Clien | | | | | ted. | | | |

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: A Active.

Back Office Manager

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.

Wise -&

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

Remittance Screen > Search

| ONWis | | 22741-509 - DEALERS | HIP NAME | | Ψ | Help <u>Contact Us</u> Welcome Amanda Miller <u>Logout</u> |
|---------------------|--------------|---------------------|-------------------|------------|-----------------------------|---|
| Contract Administra | Main Co | ontract Remittanc | e 🔻 Report | s Settings | | |
| Create Remittance | | | | | | |
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| Product Type: G/ | AP 1 | • | | | | |
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| Remittances | | | | | | |
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| Submission Date | Cycle Month | Remittance I | Number | Product | Contract Count | Total Remit Reprint |
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| Sample, Tes | .t | | | | << Prev Page 1 of 1 Next >> | Records Per Page: 50 💌 |
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On the **Remittance menu** choose **'Search'** from the dropdown.

Search By:

- Remittance #
- Product Type
- Submission Date

Wise **F**&

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



Reports Screen

| ONWise " | 22741-509 - DEALERSHIP | NAME | * | Help Contact Us Welcome Amanda Miller Logout | |
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| Contract Administration | n Quote ⊽ Contract Re | emittance 🔻 Reports | Settings | | ADDITIONAL |
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 Billing Statement 999999-ONW 202205.pdf

 SCSRPT021 Billing Statement 999999-ONW 202202.pdf





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

Phone: 800-849-9559 Email: ClientServices@WiseFandl.com

Live phone support Monday - Friday, 8:00 am - 6:00 pm CST



ONWISE Contract Administration

USER

REFERENCE

GUIDE

WELCOME TO

User Role: Dealer Management

HELP IS HERE

Phone: 800-849-9559 Email: ClientServices@WiseFandl.com www.ONWise.com







ONWise Contract Administration Portal is your online resource to:

Obtain Quotes

Retrieve/View Billing Statements

Obtain Cancellation Quotes

- Originate Contracts
- Remit Contracts

Edit Templates

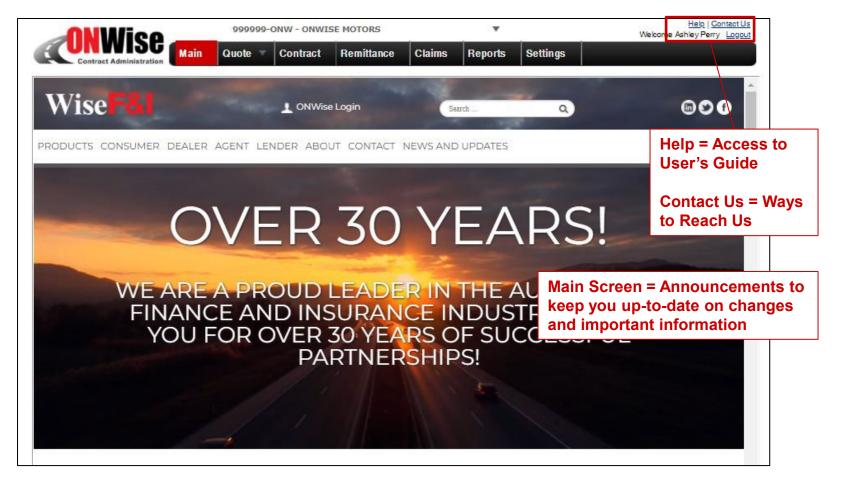
Note: ONWise access is dependent on assignment of authorized user credentials under a predefined user role setup.

Getting Started

- Go to <u>ONWise.com</u> 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





Quote Screen > Create/Save Quote

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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

The following fields are required for rating:

- Odometer
- Deal Type (GAP)
- Term (GAP)
- Finance Amount (GAP)

Click 'Save Quote'

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



Quote Screen > Print Quote (Optional)

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Quote Screen > Submit Quote

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To submit a quote and create a contract

the following fields must be provided:*

- First Name
- Last Name
- Address
- City
- State
- Zip
- VIN
- Odometer
- Additional Info.(AP, ETCH, KEY, TW)
- Deal Type (GAP)
- Term (GAP)
- Finance Amount (GAP)
- Product
- Term
- Retail Price

Preview Contract() Click 'Submit' to generate a contract.

Wise F&

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.

6 Dealer Management

Quote Screen > Generate Contract PDF

| | Mia | ^ ™ : | 22741-509 - DEALER | SHIP NAME | | * | w | Help Contact Us elcome Amanda Miller Logout |
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| | | | Jote 🔻 Contract | Remittance | ▼ Reports | Settings | | |
| Quote | ontract Administr | ation | | | | | | |
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| 04/21/2 | | F&I Manager Amanda Miller | | _ | | | | |
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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

| | Mia | ^ ™ 2 | 22741-509 - DEALERSH | IP NAME | | * | Wel | Help Contact come Amanda Miller Log |
|--------------|---|--------------------|---------------------------|--------------------|--------------------------|--------------------|--------------------------------|--|
| | | Main Q | ote 🔻 Contract | Remittance V | Reports | Settings | | |
| Quote | ontract Administr | ation | | | Incheine | o o traingo | | |
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| 04/21/202 | | Amanda Miller | | 1 | | | | |
| | er (Name, De | | • | | | | | |
| First Name | | MI | LastName | Title | | | | |
| Demo | le | | Name | The | T | | | |
| Address | | Address 2 | City | State | ZIP | Primary Phone | Seconda | n Dhana |
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| Email | Jaik Drive | Alternate Contact | Language | MO | + 03020 | | | |
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| ≡ Vehicle | (2009/CHEVE | OLET/MALIBU LTZ) | Lingiisti 🖓 | | | | | |
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| Contracts ha | Program ave been subm ted Products Program | Type | Plan ducts. Plan T | erm | | \$0.00 Retail | APPQ0000068 Print Quote Clo | |

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.

Wise **F**&

Quote Screen > Search

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| Contract Administration | Quote | Contract | Remittance | Claims | Reports | Settings | | | |
| Quote Search | | | | | | | | | |
| Search By: Customer Last Name | ~ | | Seach | Add New | | | | | |
| Plan Purchase Date From: 04/21/2022 | To: 04/2 | 1/2022 | | | | | | | |
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| ne contract. | Produ VSC | Ct Program WiseTVP | Type Plan Used TVP Sup | reme | | Deductible Retai \$100 \$9,500.00 | WTVPQ00747563 | Reprint Paylink RK | 8 |
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From the **Quote menu** choose '**Search**' from the dropdown.

- Search By:

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

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



Contract Search Screen

| -01 | Wico | 999999-ONW | - ONWISE M | IOTORS | | | | | Help Contact Us Welcome Ashley Perry Logout |
|---------------|-------------------------------|-------------------|---------------|------------|------------|-------------|-------------------|---------------|--|
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| Sale Date | ✔ 04/21/2022 | То | 05/06/2022 | 2 | | | | | |
| ayment Pla | n Provider Any | ~ | | | | | $\langle \rangle$ | | |
| ontract List | | | | | | | | | |
| | | | | | | < | < Prev Page 1 | of 1 Next > | > Records Per Page: 25 ▼ |
| Customer | VIN | Purchase Date | Product | Contract | # | T | erm* | Retail | Payment Plan Provider |
| Test, Test | 5XXG64J25MG056993 | 04/21/2022 | VSC | WTVPQ | 00747563 | 4 | 8/48 | \$2,500.00 | Paylink |
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*Status Symbol Definition:

- Pending: Submitted but NOT Remitted
- Pending Billed: Submitted AND Remitted
- Active: Submitted, Remitted AND Paid
- Void: Voided Contract
- Cancelled: Contract Cancelled
- E Expired: Contract Term Expired
- 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.

Search By:

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



Contract Screen > Contract Info

| Contract Admin | nistration | | | | | | |
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| General Information | | | | | | | Bank is Senate |
| Purchase Date Mfg. Warr. Start Dat Seller: | 04/21/2022 e: ON Wise Motors | Custome Address: | | Test, Test 123 Test Way Test, TX 12345 | Vehic | ie: | 5XXG64J25MG056993 Attributes Passenger Car 2021 KIA K5 GT LINE |
| F&I Manager/Sales Associate: Recipient ID: Stock #: | Liz Wesche Quote | Primary F Secondar Email: Language | ry Ph.: | (123) 456-7890 Test@gmail.com EN | Veh. | Odometer: Purchase Date ership: | 45,234 e: 04/21/2022 |
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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.

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

Vise -

- Re-generate
 Contract
- Void Contract

Contract Screen > Void Contract

| | WIS | G Main Qu | iote 🔻 Con | tract Rer | mittance Claims | Papar | | ttings | | | |
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| F&I Manager Associate: | r/Sales | Liz Wesche Quote | Primary Second | Ph.: ary Ph.: | (123) 456-7890 | | Sale Odd Veh. Pur | | 45,234 e: 04/21/2022 | | |
| Recipient ID Stock #: | : | | Email: Langua | ae: | Test@gmail.cor EN | n (| Ownersh | iip: | | | |
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Void: Voided Contract

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

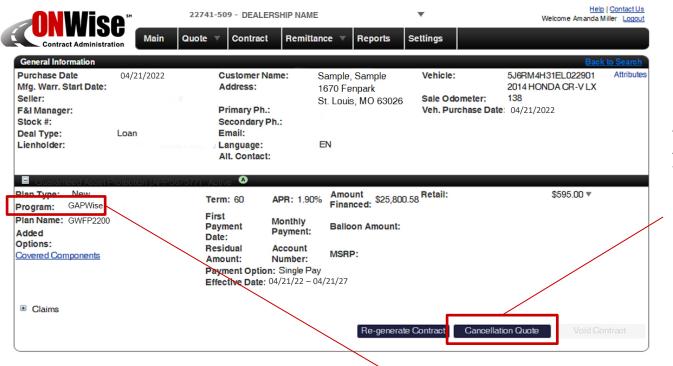
Once you **'Confirm Void'** the copy of the contract will have the word VOID across it.

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.





Only ACTIVE contracts can be cancelled.

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

A ctive: Submitted, Remitted AND Paid

NOTE: The Contract screen will autofill the correct program to be cancelled. To verify, look at the '**Program'** line.



13 Dealer Management

| | 22741 | -509 - DEALERS | HIP NAME | . | Help Contact Us Welcome Amanda Miller Logout |
|---|--|-------------------|-----------------------|-----------------------------|---|
| Contract Administration | Main Quote | Contract | Remittance 🔻 | Reports Settings | |
| Contract Information | | | | | Back To Contract |
| Contract #: Sale Date: Customer: Seller: Lienholder: Cancellation Information | APP567577 04/21/2022 Sample, Sample Dealership Name Lienholder | unance Co., | | | |
| Cancel Date: Cancel Odometer: Cancel Reason: | O May 💌 Su Mo Tu We | 2022 🔽 O | | | |
| Cancellation Rates Orig. Retail Cost: Orig. Net Cost: Non Ref. fee (Customer): Cancellation Fee: Net Refund From Admin.: Refund From Seller: Cancellation Refund Amount: | 4 5 6 11 12 13 1 18 19 20 2 25 26 27 2 | 1 22 23 24 | A T | | |
| Discard Changes | Calculate | | | tract Cancellation R | eport: |
| Cancellation quotes are calculate | d based on the milea | ge of the vehicle | or the time period th | e contract has been in forc | e and are subject to change due to increases in |

Under Cancellation Information you will need to in put:

- **Cancel Date** •
- **Cancel Odometer** •
- Cancel Reason •

Click 'Calculate'

to calculate and view cancellation rates.

Wise - &

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.

| eports Settings Back To Contract |
|-------------------------------------|
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Once the calculation is made click **'Save Quote'**.



15 Dealer Management

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|---|--|--|--|---|---------------------------------|-----------------|---|
| Con | tract Administration | Main Quote | ▼ Contract | Remittance 🔻 | Reports | Settings | |
| Contract Inf Contract #: Sale Date: Customer: Seller: Lienholder: Cancellation Cancel Date Cancel Odd | Information e: | APP567577 04/21/2022 Sample, Sample Dealership Name Lienholder | | 0,000 | | | Back To Contract |
| Cancel Rea | son: | Paid Off Vehicle | | | • | | |
| Orig. Reta Orig. Neta Orig. Net (Non Ref. f | CANCELLATION QUO | | FACTORS | 92.223 | | | |
| Cancellati Net Refun Refund Fr Cancellati | Contract Information Contract Number APP567577 Customer Last Name Customer First Name VIN 5/6RM4H31EL022901 Vehicle Vear 2014 Vehicle Nake HONDA Vehicle Model CR-V LX | | Sale Date 04/21/20 Seller Name Seller ID Lienholder American H | | | | eport: Cancellation Quote Worksheet - Drv Print |
| Cancellation mileage or ti If the admini | Cancellation Information Cancel Date 05/05/2014 Cancel Reason Paid Off Vehicle | 2 | Term Refund Factor 92.2 Cancel Odometer 4000 Mileage Refund Factor 0 | D | tract ha | s been in force | e and are subject to change due to increases in d jointly to the customer and the lienholder/lessor. |
| | Refund Information Orig. Retail Cost Orig. Net Cost Non-refundable Fee Cancellation Fee Net Refund from Provider Refund from Seller Cancellation Refund Amount Customer Refund Amount Due Customer Disclairner | \$595.00 \$0.00 (\$50.00) \$498.73 \$498.73 | | | | | |
| | | | | t to change daily. No cancellation will a any questions regarding this cancellat | | | |

Dealer Management

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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.

Wise **F**

Remittance Screen > Create

| ONWise " | ME | Ŧ | | <u>Help</u> Welcome Amanda M | <u> ContactUs</u> Miller <u>Logout</u> | | | | |
|--|-------------------------------------|------------------|-----------------|--------------------------------------|---|--------------------------|----------------------------|--|--|
| Contract Administration | Contract Re | emittance 🔻 | Reports Settin | igs | | | | | |
| Create Remittance | | | | Due From | Overhead Over | Densit | | | |
| Product: OGAP CEtch | Program: ALL | Ŧ | | Due From TOTAL | Contract Count | Remit [0 | \$0.00 | | |
| Lienholder: ANY | Plan Purchase ALL DATES Date: | š 🐨 | | | | | | | |
| Filter Include This Page Exclude This Page | Include All Pages E | xclude All Pages | | | | | | | |
| Contracts | | 04/ | 21/2022 | | | | | | |
| Include Customer VIN | | Purchase Date | Contract # | Plan Description | Term Lienholder | Total Contract Due | Due From | | |
| Sample, Test 5TF | JX4GN1DX020098 | 05/25/2022 | 150EPQF00768190 | EquityProtect Core 150EP FG122 | 66 MECHANICS BANK | \$198.00 |) Seller- 21625- 351 | | |
| << Prev Page 1 • of 1 Next >> Records Per Page: 50 • | | | | | | | | | |
| Preview Remittance Download All to Spreadsheet Save Submit | | | | | | | | | |
| 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: A Active.

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.



Remittance Screen > Search

| ONWise [®] | | 22741-509 - DEALERSHIP NAME | | | | * | Help Contact Us Welcome Amanda Miller Logout |
|----------------------------|---------------|-----------------------------|-----------------------|---------------|----------|----------------------------|---|
| Contract Admin | Main | Contract | Remittance 🔻 | Reports | Settings | | |
| Create Remittance | | | | | | | |
| Remittance #: | | R | emittance Search: Aut | omatic and Ma | nual 🔻 | | |
| Product Type: | GAP | T | | | | | |
| Submission Date: | CURRENT MONTH | ▼From:0 | 5/01/2014 To : | 05/31/2014 | Filter | | |
| Remittances | | | | | | | |
| | | | | | | << Prev Page 1 of 1 Next > | > Records Per Page: 50 💌 |
| Submission Date | Cycle Mo | nth | Remittance Number | 1 | Product | Contract Count | Total Remit Reprint |
| 05/05/2022 | May 20 | 22 | 22741-509-005 | | GAP | 1 | \$198.00 |
| 05/05/2022 | May 20 | 22 | 22741-509-004 | | GAP | 1 | \$223.00 |
| Sample, | , Test | | | | | << 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 on 'Submission Date' or 'Cycle Month' in the black bar will sort the search results in ascending or descending order.



Reports Screen

| ONWise " | 22741-509 - DEALERSHIP N | NAME | * | Help Contac Welcome Amanda Miller Lo | |
|-------------------------------|---------------------------|---------------------|----------|--|------------|
| Contract Administration Main | Quote V Contract Re | emittance 🔻 Reports | Settings | | ADDITIONAL |
| Reports | | | | | REPORTS |
| Category: Billing Statement - | | | | | TO COME |
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| ONWico | 999999-ONW - ONWISE MOTOR | * | | Help Contact Us Welcome Ashley Perry Logout | |







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

Phone: 800-849-9559 Email: ClientServices@WiseFandl.com

Live phone support Monday - Friday, 8:00 am - 6:00 pm CST

