

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



ONWISE Contract Administration



WELCOME TO

USER REFERENCE GUIDE

User Role: F&I Manager

HELP IS HERE

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

www.ONWise.com



WiseF&I



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.

Quote Screen > Create/Save Quote

ONWise
Contract Administration

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Logout

Main **Quote** Contract Remittance Claims Reports Settings

Quote

Deal Number Plan Purchase Date F&I Manager/Sales Associate
08/03/2022 Vikas Mahendra

Customer (Test, Test I)

First Name MI Last Name Title
Test T Test Test
Address Address 2 City State/Prov Zip/Postal Primary Phone Secondary Phone
123 Main Test CA
Email Alternate Contact Language
English

Vehicle (Passenger Car/2022/KIA/K5/GT LINE)

VIN Odometer Mfg. Warr. Start Date Veh. Purchase Price Veh. Purchase Date Auto Code Ownership
5XXG84A21NG234567 55 * New Pre-Owned

Attributes (Passenger Car/2022/KIA/K5/GT LINE/Turbocharged/Sedan/4 Cylinders/Front Wheel Drive/98 CID / 1.6 L/Gas/Mid Size Car/Complete)

Stock # Base Warranty Powertrain Warranty
60 / 60,000 120 / 100,000

Additional Information

AP Number of Keys
Etch Etch Serial Number
KEY Number of Keys
TW Number of Keys

Loan/Lease

Deal Type	Term	Finance Amt	MSRP	NADA	APR	Monthly Pmt	1st Pmt Date	Balloon Amt	Residual Amt	Acct. #
Loan	24	\$24,569.00	\$24,569.00							

Lienholder

Products

Clear Template

Program	Type	Plan	Term	Deductible	Retail (excl. taxes)	Options	Submit
VSC	WiseMVP	UseC	MVP Premium	12/12,000	100	\$585.00	
GAP	GAPWise 150		GAPWise Core 150GV	24 months		\$119.00	
AP	WiseCARE	New	WiseCARE Choice: Int	12/999,999	0	\$234.00	
DV	VALUEWise		VALUEWise - VW FG3	36 months		\$131.00	
Etch	THEFTWise		THEFTWise - TWTD 5	80 months		\$40.00	
KEY	KEYWise	New	KEYWise - KW FG500	24/999,999	0	\$54.00	
TW	TIREWise	New	TIREWise - TW FT300	24/999,999	0	\$63.00	
						\$1,226.00	

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

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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Main Quote Contract Remittance Claims Reports Settings

Quote

Deal Number Plan Purchase Date F&I Manager/Sales Associate
 08/03/2022 Vikas Mahendra

Customer (Test, Test T)

First Name MI Last Name Title
 Test T Test
 Address Address 2 City State/Prov Zip/Postal Primary Phone Secondary Phone
 123 Main Test CA
 Email Alternate Contact Language
 English

Vehicle (Passenger Car/2022/KIA/K5/GT LINE)

VIN Odometer Mfg. Warr. Start Date Veh. Purchase Price
 5XXG64A21NG234567 55

Attributes (Passenger Car/2022/KIA/K5/GT LINE/Turbocharged/Sedan/4 Cylinders/Front W
 Stock # Base Warranty Powertrain Warranty
 60 / 60,000 120 / 100,000

Additional Information

AP Number of Keys
 Etch Etch Serial Number
 KEY Number of Keys
 TW Number of Keys

Loan/Lease

Deal Type	Term	Finance Amt	MSRP	NADA	APR	Mod
Loan	24	\$24,599.00	\$24,599.00			

Lienholder

Products

Program	Type	Plan	Term	Deductible
VSC WiseMVP	Usec	MVP Premium	12/12,000	100
GAP GAPWise 150		GAPWise Core 150GV	24 months	
AP WiseCARE	New	WiseCARE Choice: Int	12/999,999	0
DV VALUEWise		VALUEWise - VW FG3	36 months	
Etch THEFTWise		THEFTWise - TWTD 5	60 months	
KEY KEYWise	New	KEYWise - KW FG500	24/999,999	0
TW TIREWise	New	TIREWise - TW FT300	24/999,999	0

Quote saved successfully.

Print Quote Close Cancel Changes

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

Wise

Purchase Date Aug 3, 2022

Vehicle:	5XXG64A21NG234567 Passenger Car 2022 KIA K5 GT LINE	Customer:	Test T Test 123 Main Test, CA	Seller:	ONWise Motors 1670 Fenpark Drive Dallas, CA 75232 (636) 349-1234
Odometer:	55	F&I Manager:	Vikas Mahendra		
Product	Program	Plan	Options	Price	
VSC	WiseMVP	Used MVP Premium Term: 12/12,000 \$100	MVP 4wd/AWD/Diesel/CNG/Turbo/1 Ton	\$585.00	
GAP	GAPWise 150	New GAPWise Core 150GV FG120 Term: 24 months \$0		\$119.00	
AP	WiseCARE	New WiseCARE Choice: Int/Ext, ERA Term: 12/999,999 \$0		\$234.00	
DV	VALUEWise	New VALUEWise - VW FG3001 Term: 36 months \$0		\$131.00	
Etch	THEFTWise	New THEFTWise - TWTD 5K Term: 60 months \$0		\$40.00	
KEY	KEYWise	New KEYWise - KW FG5000 Term: 24/999,999 \$0		\$54.00	
TW	TIREWise	New TIREWise - TW FT3000 Base Term: 24/999,999 \$0		\$63.00	
TOTAL				\$1226.00	

Click **'Print Quote'**

Quote Screen > Submit Quote

ONWise 999999-ONW - ONWISE MOTORS
Contract Administration

Main **Quote** Contract Remittance Claims Reports Settings

Welcome Liz Wesche Logout

Quote

Deal Number Plan Purchase Date F&I Manager/Sales Associate
04/21/2022 Liz Wesche

Customer (Test, Test)

First Name MI Last Name Title
Test Test
Address Address 2 City State/Prov Zip/Postal Primary Phone Secondary Phone
123 Test Way TX 12345 (123)456-7890
Email Alternate Contact Language
Test@gmail.com English

Vehicle (Passenger Car/2021/KIA/K5/GT LINE)

VIN Odometer Mfg. Warr. Start Date Veh. Purchase Price Veh. Purchase Date Auto Code Ownership
5XXG84J25MG058993 45234 \$48,000.00 04/21/2022 * New Pre-Owned

Attributes (Passenger Car/2021/KIA/K5/GT LINE/Turbocharged/Sedan/4 Cylinders/Front Wheel Drive/98 CID / 1.8 L/Gas/Mid Size Car/Complete)

Stock # Base Warranty Powertrain Warranty
60 / 60,000 120 / 100,000

Additional Information

AP Number of Keys
2

Etch Etch Serial Number

KEY Number of Keys
2

TW Number of Keys
2

Loan/Lease

Lienholder

Products

Clear Template

Program	Type	Plan	Term	Deductible	Remit	Retail (excl.taxes)	Payment Plan	Options
VSC WiseTVP	Usecd	TVP Supreme	48/48,000	100	\$1,580.00	\$2,500.00	None (default)	Submit
GAP GAPWise 150		GAPWise Core 150GV	72 months		\$209.00	\$795.00	None (default)	Submit
AP WiseAPPEARANCE	New	WiseAPPEARANCE	60/999,999	0	\$149.00	\$500.00	None (default)	Submit
Etch THEFTWise		THEFTWise - TWTD 5	60 months		\$40.00	\$275.00	None (default)	Submit
KEY KEYWise	New	KEYWise - KW FG500	60/999,999	0	\$74.00	\$300.00	None (default)	Submit
TW TIRESWise 3TW	New	TIRESWise - 3TW FG8	60/999,999	0	\$138.00	\$495.00	None (default)	Submit

\$4,865.00

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.

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

ONWiseSM
Contract Administration

22741-509 - DEALERSHIP NAME

Welcome Amanda Miller [Help](#) [Contact Us](#) [Logout](#)

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

Quote

Plan Purchase Date: 04/21/2022 F&I Manager: Amanda Miller

Customer (Name, Demo)

First Name: Demo MI: Last Name: Title: Name: 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	1 st 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	APPO00000068 Void 

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

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

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.

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

Status Symbol Definition

- P** Pending: Submitted but NOT Remitted
- P\$** 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**

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

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USER'S GUIDE

Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

CONNECT
WITH US



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

WiseF&I[®]



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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



WiseF&I



ONWise Contract Administration Portal is your online resource to:

- View and Void Contracts
- Retrieve/View Billing Statements
- Remit Contracts
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- If you forgot your password, there is a 'Forgot your password?' link on the Login Screen.

Contract Search Screen

ONWise Contract Administration

999999-ONW - ONWISE MOTORS

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Welcome Ashley Perry Logout

Main Quote **Contract** Remittance Claims Reports Settings

Contract Search

To search for contracts sold outside this dealership please use Contract# or VIN#

Search By:

Sale Date: To:

Payment Plan Provider:

Contract List

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

Customer	VIN	Purchase Date	Product	Contract #	Term*	Retail	Payment Plan Provider
Test, Test	5XXG64J25MG056993	04/21/2022	VSC	WTVPQ00747563	48/48	\$2,500.00	Paylink
Test, Test	5XXG64J25MG056993	04/21/2022	GAP	150GWTXQ00747566	72	\$795.00	
Test, Test	5XXG64J25MG056993	04/21/2022	AP	5WAAQ00747567	60/999.999	\$500.00	
Test, Test	5XXG64J25MG056993	04/21/2022	KEY	KWQ00747568	60/999.999	\$300.00	
Test, Test	5XXG64J25MG056993	04/21/2022	TW	3TWQ00747569	60/999.999	\$495.00	

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

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

ONWise
Contract Administration

999999-ONW - ONWISE MOTORS

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Welcome Ashley Perry Logout

Main Quote **Contract** Remittance Claims Reports Settings

General Information [Back to Search](#)

Purchase Date: 04/21/2022
Mfg. Warr. Start Date:
Seller: ONWise Motors
F&I Manager/Sales Associate: Liz Wesche [Quote](#)
Recipient ID:
Stock #:
Lienholder: PayLink Direct [Edit Lienholder](#)
Group:
Customer Name: Test, Test
Address: 123 Test Way
Test, TX 12345
Primary Ph.: (123) 456-7890
Secondary Ph.:
Email: Test@gmail.com
Language: EN
Alt. Contact:
[Edit Customer Information](#)
Vehicle: 5XXG64J25MG056993 [Attributes](#)
Passenger Car 2021 KIA K5 GT LINE
Sale Odometer: 45,234
Veh. Purchase Date: 04/21/2022
Ownership:

Service Contract (WTVPC00747569) Pending

Plan Type: Used
Program: WiseTVP
Plan Name: TVP Supreme
Added Options: TVP 4WD, AWD, Turbo, Supercharger
Term: 48
Miles/km: 48,000 Ded: \$100
Retail (excl. taxes): \$2,500.00
Payment Option: Single Pay
Effective Date: 04/21/2022 - 04/21/2026
Effective Odometer: 45,234 - 93,234
Payment Plan: Paylink - 18 mos, 5%/\$125.00 down, \$131.94/mo

Claims
No claims reported.

[Copy of Contract](#) [PPP Reprint](#) [Re-generate Contract](#) [Cancellation Quote](#)

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

ONWise Contract Administration

999999-ONW - ONWISE MOTORS

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Main Quote **Contract** Remittance Claims Reports Settings

General Information [Track & Search](#)

Purchase Date: 04/21/2022	Customer Name: Test, Test	Vehicle: 5XXG64J25MG056993
Mfg. Warr. Start Date:	Address: 123 Test Way	Passenger Car 2021 KIA K5 GT
Seller: ONWise Motors	Test, TX 12345	LINE
F&I Manager/Sales: Liz Wesche	Primary Ph.: (123) 456-7890	Sale Odometer: 45,234
Associate: Quote	Secondary Ph.:	Veh. Purchase Date: 04/21/2022
Recipient ID:	Email: Test@gmail.com	Ownership:
Stock #:	Language: EN	
Lienholder: PayLink Direct	Alt. Contact:	
Edit Lienholder	Edit Customer Information	
Group:		

Service Contract (WTVPO00747563) Pending

Plan Type: Used	Term: 48	Miles/km: 48,000	Ded: \$100	Retail (excl. taxes): \$2,500.00
Program: WiseTVP	Payment: Single			
Plan Name: TVP Supreme	Option: Pay			
Added: TVP 4WD, AWD, Turbo,	Effective Date: 04/21/2022 - 04/21/2026			
Options: Supercharger	Effective Odom: 45,234 - 93,234			
	Payment Plan: Paylink - 18 mos, 5%/\$125.00 down, \$131.94/mo			

[Claims](#)
No claims reported.

[Copy of Contract](#) [PPP Reprint](#) [Re-generate Contract](#) **Void 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**  contracts.

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

 Void: Voided Contract

Contract Screen > Cancellation Quote

ONWise
Contract Administration

22741-509 - DEALERSHIP NAME

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Main Quote Contract Remittance Reports Settings

General Information [Back to Search](#)

Purchase Date: 04/21/2022	Customer Name: Sample, Sample	Vehicle: 5J6RM4H31EL022901	Attributes
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: 04/21/2022	
Stock #:	Secondary Ph.:		
Deal Type: Loan	Email:		
Lienholder:	Language: EN		
	Alt. Contact:		

Guaranteed Asset Protection (GAP) 567577 - Active A

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: 04/21/22 - 04/21/27			

[Claims](#)

Re-generate Contract **Cancellation Quote** Void 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 Active: Submitted, Remitted AND Paid

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

Contract Screen > Cancellation Quote

ONWiseSM Contract Administration

22741-509 - DEALERSHIP NAME

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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:
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.

Contract Screen > Cancellation Quote

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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: 05/05/2022
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

		FACTORS	
Orig. Retail Cost:	\$595.00	Term (%):	92.223
Orig. Net Cost:		Mileage (%):	0.000
Non Ref. fee (Customer):	\$0.00	Calc Method:	
Cancellation Fee:	(\$50.00)		
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 **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: 05/05/2022
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

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

CANCELLATION QUOTE WORKSHEET

Contract Information

Contract Number	APP567577	Sale Date	04/21/2022
Customer Last Name		Seller Name	
Customer First Name		Seller ID	
VIN	5J6RM4H31E022901	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
---------------------	----------

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 636-600-4426. If you have any questions regarding this cancellation or the cancellation process, please contact Client Services at 800-849-9559.

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

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Contract Administration

22741-509 - DEALERSHIP NAME

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Main Contract **Remittance** Reports Settings

Create Remittance

Product: ☒ GAP ☐ Etch

Lienholder: ANY

Program: ALL

Plan: ALL DATES

Date:

Filter

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

Contracts 04/21/2021

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Total Contract Due	Due From
<input type="checkbox"/>	Sample, Test	5TFJX4GN1DX020098	05/25/2022	150EPQF00768190	EquityProtect Core 150EP FG122	66	MECHANICS BANK	\$198.00	Seller-21625-351

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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.

Back Office Manager

WiseF&I

Remittance Screen > Search

ONWiseSM
Contract Administration

22741-509 - DEALERSHIP NAME

[Help](#) | [Contact Us](#)
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[Main](#) [Contract](#) [Remittance](#) [Reports](#) [Settings](#)

Create Remittance

Remittance #: Remittance Search: Automatic and Manual ▼

Product Type:

Submission Date: From: To:

Remittances

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

Submission Date	Cycle Month	Remittance Number	Product	Contract Count	Total Remit	Reprint
05/05/2022	May 2022	22741-509-005	GAP	1	\$198.00	
05/05/2022	May 2022	22741-509-004	GAP	1	\$223.00	

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


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



22741-509 - DEALERSHIP NAME


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Main Quote Contract Remittance **Reports** Settings

Reports

Category:

ADDITIONAL
REPORTS
TO COME



999999-ONW - ONWISE MOTORS

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Main Quote Contract Remittance Claims **Reports** Settings

Reports

Category:

[SCSRPT021 Billing Statement 999999-ONW 202205.pdf](#)
[SCSRPT021 Billing Statement 999999-ONW 202204.pdf](#)
[SCSRPT021 Billing Statement 999999-ONW 202202.pdf](#)

**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 - 6:00 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



WiseF&I



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 displays the ONWise web application interface. At the top, the header includes the ONWise logo, the user ID '999999-ONW - ONWISE MOTORS', and a navigation bar with links: Main (highlighted), Quote, Contract, Remittance, Claims, Reports, and Settings. In the top right corner, there are links for 'Help' and 'Contact Us' (both highlighted with a red box), and a user greeting 'Welcome Ashley Perry' with a 'Logout' link. Below the header, the main content area features the 'WiseF&I' logo, an 'ONWise Login' button, a search bar, and social media icons. A navigation menu lists: PRODUCTS, CONSUMER, DEALER, AGENT, LENDER, ABOUT, CONTACT, and NEWS AND UPDATES. The central banner has a sunset background with the text 'OVER 30 YEARS!' and 'WE ARE A PROUD LEADER IN THE AUTO FINANCE AND INSURANCE INDUSTRY. YOU FOR OVER 30 YEARS OF SUCCESSFUL PARTNERSHIPS!'. Three callout boxes provide additional context: one points to the 'Help' and 'Contact Us' links, stating 'Help = Access to User's Guide' and 'Contact Us = Ways to Reach Us'; another points to the main banner area, stating 'Main Screen = Announcements to keep you up-to-date on changes and important information'.

ONWise
Contract Administration

999999-ONW - ONWISE MOTORS

Welcome Ashley Perry [Logout](#) [Help](#) [Contact Us](#)

Main Quote Contract Remittance Claims Reports Settings

WiseF&I ONWise Login Search ...

PRODUCTS CONSUMER DEALER AGENT LENDER ABOUT CONTACT NEWS AND UPDATES

OVER 30 YEARS!

WE ARE A PROUD LEADER IN THE AUTO FINANCE AND INSURANCE INDUSTRY. YOU FOR OVER 30 YEARS OF SUCCESSFUL PARTNERSHIPS!

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 > Create/Save Quote

ONWise Contract Administration [Help](#) | [Contact Us](#) [Logout](#)

Main **Quote** Contract Remittance Claims Reports Settings

Quote

Deal Number Plan Purchase Date F&I Manager/Sales Associate
 08/03/2022 Vikas Mahendra

Customer (Test, Test I)

First Name MI Last Name Title
 Test T Test
 Address Address 2 City State/Prov Zip/Postal Primary Phone Secondary Phone
 123 Main Test CA
 Email Alternate Contact Language
 English

Vehicle (Passenger Car/2022/KIA/K5/GT LINE)

VIN Odometer Mfg. Warr. Start Date Veh. Purchase Price Veh. Purchase Date Auto Code Ownership
 5XXG84A21NG234567 55
☐ New ☐ Pre-Owned

Attributes (Passenger Car/2022/KIA/K5/GT LINE/Turbocharged/Sedan/4 Cylinders/Front Wheel Drive/98 CID / 1.6 L/Gas/Mid Size Car/Complete)

Stock # Base Warranty Powertrain Warranty
 60 / 60,000 120 / 100,000

Additional Information

AP Number of Keys
 Etch Etch Serial Number
 KEY Number of Keys
 TW Number of Keys

Loan/Lease

Deal Type	Term	Finance Amt	MSRP	NADA	APR	Monthly Pmt	1st Pmt Date	Balloon Amt	Residual Amt	Acct. #
Loan	24	\$24,569.00	\$24,569.00							

Lienholder

Products

[Clear Template](#)

Program	Type	Plan	Term	Deductible	Retail (excl. taxes)	Options	Submit
VSC	WiseMVP	UseC	MVP Premium	12/12,000	100	\$585.00	
GAP	GAPWise 150		GAPWise Core 150GV	24 months		\$119.00	
AP	WiseCARE	New	WiseCARE Choice: Int	12/999,999	0	\$234.00	
DV	VALUEWise		VALUEWise - VW FG3	36 months		\$131.00	
Etch	THEFTWise		THEFTWise - TWTD 5	80 months		\$40.00	
KEY	KEYWise	New	KEYWise - KW FG500	24/999,999	0	\$54.00	
TW	TIREWise	New	TIREWise - TW FT300	24/999,999	0	\$63.00	
						\$1,226.00	

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

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)

ONWise
Contract Administration

Help / Contact Us
Logout

Main Quote Contract Remittance Claims Reports Settings

Quote

Deal Number Plan Purchase Date F&I Manager/Sales Associate
 08/03/2022 Vikas Mahendra

Customer (Test, Test T)

First Name MI Last Name Title
 Test T Test
 Address Address 2 City State/Prov Zip/Postal Primary Phone Secondary Phone
 123 Main Test CA
 Email Alternate Contact Language
 English

Vehicle (Passenger Car/2022/KIA/K5/GT LINE)

VIN Odometer Mfg. Warr. Start Date Veh. Purchase Price
 5XXG64A21NG234567 55

Attributes (Passenger Car/2022/KIA/K5/GT LINE/Turbocharged/Sedan/4 Cylinders/Front W
 Stock # Base Warranty Powertrain Warranty
 60 / 60,000 120 / 100,000

Additional Information

AP Number of Keys
 Etch Etch Serial Number
 KEY Number of Keys
 TW Number of Keys

Loan/Lease

Deal Type	Term	Finance Amt	MSRP	NADA	APR	Mod
Loan	24	\$24,599.00	\$24,599.00			

Lienholder

Products

Program	Type	Plan	Term	Deductible	Price
VSC WiseMVP	Used	MVP Premium	12/12,000	100	\$585.00
GAP GAPWise 150		GAPWise Core 150GV	24 months		\$119.00
AP WiseCARE	New	WiseCARE Choice: Int	12/999,999	0	\$234.00
DV VALUEWise		VALUEWise - VW FG3	36 months		\$131.00
Etch THEFTWise		THEFTWise - TWTD 5K	60 months		\$40.00
KEY KEYWise	New	KEYWise - KW FG500	24/999,999	0	\$54.00
TW TIREWise	New	TIREWise - TW FT300	24/999,999	0	\$63.00
					TOTAL \$1226.00

Quote saved successfully.

Print Quote Close Cancel Changes

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

Click **'Print Quote'**

Quote Screen > Submit Quote

ONWise 999999-ONW - ONWISE MOTORS
Contract Administration

Main **Quote** Contract Remittance Claims Reports Settings

Welcome Liz Wesche Logout

Quote

Deal Number Plan Purchase Date F&I Manager/Sales Associate
04/21/2022 Liz Wesche

Customer (Test, Test)

First Name MI Last Name Title
Test Test
Address Address 2 City State/Prov Zip/Postal Primary Phone Secondary Phone
123 Test Way TX 12345 (123)456-7890
Email Alternate Contact Language
Test@gmail.com English

Vehicle (Passenger Car/2021/KIA/K5/GT LINE)

VIN Odometer Mfg. Warr. Start Date Veh. Purchase Price Veh. Purchase Date Auto Code Ownership
5XXG84J25MG058993 45234 \$48,000.00 04/21/2022 * New Pre-Owned

Attributes (Passenger Car/2021/KIA/K5/GT LINE/Turbocharged/Sedan/4 Cylinders/Front Wheel Drive/98 CID / 1.8 L/Gas/Mid Size Car/Complete)

Stock # Base Warranty Powertrain Warranty
60 / 60,000 120 / 100,000

Additional Information

AP Number of Keys
2

Etch Etch Serial Number

KEY Number of Keys
2

TW Number of Keys
2

Loan/Lease

Lienholder

Products

Program Type Plan Term Deductible Remit Retail (excl.taxes) Submit

VSC	WiseTVP	Useac	TVP Supreme	48/48,000	100	\$1,580.00	\$2,500.00	Submit
								Payment Plan None (default)
GAP	GAPWise 150		GAPWise Core 150GV	72 months		\$209.00	\$795.00	Submit
								Options
AP	WiseAPPEARANCE	New	WiseAPPEARANCE	60/999,999	0	\$149.00	\$500.00	Submit
								Payment Plan None (default)
Etch	THEFTWise		THEFTWise - TWTD 5	60 months		\$40.00	\$275.00	Submit
								Payment Plan None (default)
KEY	KEYWise	New	KEYWise - KW FG500	60/999,999	0	\$74.00	\$300.00	Submit
								Payment Plan None (default)
TW	TIREWise 3TW	New	TIREWise - 3TW FG8	60/999,999	0	\$138.00	\$495.00	Submit
								Payment Plan None (default)

\$4,865.00

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.

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

22741-509 - DEALERSHIP NAME

Welcome Amanda Miller [Help](#) [Contact Us](#) [Logout](#)

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

Quote

Plan Purchase Date: 04/21/2022
F&I Manager: Amanda Miller

Customer (Name, Demo)

First Name: Demo, MI: , Last 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	1 st 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	APPO00000068 

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 > Void Contract

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

Main **Quote** Contract Remittance Reports Settings

Quote

Plan Purchase Date: 04/21/2022 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	APPQ000000068 Void

[Save Quote](#) [Print Quote](#) [Close](#) [Cancel Changes](#)

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

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

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.

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

Contract Search Screen

ONWise Contract Administration 999999-ONW - ONWISE MOTORS [Help](#) | [Contact Us](#)
Welcome Ashley Perry [Logout](#)

Main Quote **Contract** Remittance Claims Reports Settings

Contract Search
To search for contracts sold outside this dealership please use Contract# or VIN#

Search By:

Sale Date: To:

Payment Plan Provider:

Contract List

Customer	VIN	Purchase Date	Product	Contract #	Term*	Retail	Payment Plan Provider
Test, Test	5XXG64J25MG056993	04/21/2022	VSC	WTVPQ00747563	48/48	\$2,500.00	Paylink
Test, Test	5XXG64J25MG056993	04/21/2022	GAP	150GWTXQ00747566	72	\$795.00	
Test, Test	5XXG64J25MG056993	04/21/2022	AP	5WAAQ00747567	60/999.999	\$500.00	
Test, Test	5XXG64J25MG056993	04/21/2022	KEY	KWQ00747568	60/999.999	\$300.00	
Test, Test	5XXG64J25MG056993	04/21/2022	TW	3TWQ00747569	60/999.999	\$495.00	

Status: ☐ Pending ☐ Pending-Billed ☐ Active ☐ Void ☐ Cancelled ☐ Expired ☐ 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

ONWise
Contract Administration

999999-ONW - ONWISE MOTORS

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Welcome Ashley Perry Logout

Main Quote **Contract** Remittance Claims Reports Settings

General Information [Back to Search](#)

Purchase Date:	04/21/2022	Customer Name:	Test, Test	Vehicle:	5XXG64J25MG056993
Mfg. Warr. Start Date:		Address:	123 Test Way		Passenger Car 2021 KIA K5 GT
Seller:	ONWise Motors		Test, TX 12345		LINE
F&I Manager/Sales Associate:	Liz Wesche	Primary Ph.:	(123) 456-7890	Sale Odometer:	45,234
	Quote	Secondary Ph.:		Veh. Purchase Date:	04/21/2022
Recipient ID:		Email:	Test@gmail.com	Ownership:	
Stock #:		Language:	EN		
Lienholder:	PayLink Direct	Alt. Contact:			
	Edit Lienholder	Edit Customer Information			
Group:					

Service Contract (WTVPC00747569) Pending

Plan Type:	Used	Term:	48	Miles/km:	48,000 Ded: \$100	Retail (excl. taxes):	\$2,500.00
Program:	WiseTVP	Payment Option:	Single Pay				
Plan Name:	TVP Supreme	Effective Date:	04/21/2022 - 04/21/2026				
Added Options:	TVP 4WD, AWD, Turbo, Supercharger	Effective Odom:	45,234 - 93,234				
		Payment Plan:	Paylink - 18 mos, 5%/\$125.00 down, \$131.94/mo				

☐ Claims
No claims reported.

[Copy of Contract](#) [PPP Reprint](#) [Re-generate Contract](#) [Cancellation Quote](#)

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

ONWise Contract Administration

999999-ONW - ONWISE MOTORS

Help | Contact Us
Welcome Ashley Perry Logout

Main Quote **Contract** Remittance Claims Reports Settings

General Information [Track & Search](#)

Purchase Date:	04/21/2022	Customer Name:	Test, Test	Vehicle:	5XXG64J25MG056993
Mfg. Warr. Start Date:		Address:	123 Test Way		Passenger Car 2021 KIA K5 GT
Seller:	ONWise Motors		Test, TX 12345		LINE
F&I Manager/Sales Associate:	Liz Wesche	Primary Ph.:	(123) 456-7890	Sale Odometer:	45,234
Recipient ID:	Quote	Secondary Ph.:		Veh. Purchase Date:	04/21/2022
Stock #:		Email:	Test@gmail.com	Ownership:	
Lienholder:	PayLink Direct	Language:	EN		
	Edit Lienholder	Alt. Contact:			
Group:		Edit Customer Information			

Service Contract (WTVPO00747563) Pending

Plan Type:	Used	Term:	48	Miles/km:	48,000	Ded:	\$100	Retail (excl. taxes):	\$2,500.00
Program:	WiseTVP	Payment	Single						
Plan Name:	TVP Supreme	Option:	Pay						
Added	TVP 4WD, AWD, Turbo,	Effective	04/21/2022 - 04/21/2026						
Options:	Supercharger	Date:							
		Effective	45,234 - 93,234						
		Odom:							
		Payment	Paylink - 18 mos, 5%/\$125.00 down,						
		Plan:	\$131.94/mo						

Claims
No claims reported.

[Copy of Contract](#)

PPP Reprint Re-generate Contract **Void 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**  contracts.

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

 Void: Voided Contract

Contract Screen > Cancellation Quote

The screenshot displays the ONWise Contract Administration interface. At the top, there's a header with the ONWise logo, a dealership name '22741-509 - DEALERSHIP NAME', and user information 'Welcome Amanda Miller'. Below the header is a navigation bar with tabs: Main, Quote, Contract, Remittance, Reports, and Settings. The 'Contract' tab is selected.

The main content area is titled 'General Information' and contains a form with various fields. A red box highlights the 'Program' field, which is set to 'GAPWise'. Another red box highlights the 'Cancellation Quote' button at the bottom right of the form.

Contract Details:

- Purchase Date: 04/21/2022
- Customer Name: Sample, Sample
- Vehicle: 5J6RM4H31EL022901
- Mfg. Warr. Start Date: 2014 HONDA CR-V LX
- Seller: 1670 Fenpark
- Address: St. Louis, MO 63026
- Sale Odometer: 138
- F&I Manager: Primary Ph.: .
- Stock #: Secondary Ph.: .
- Deal Type: Loan
- Lienholder: .
- Language: EN
- Alt. Contact: .

Financial Details:

- Term: 60
- APR: 1.90%
- Amount Financed: \$25,800.58
- Retail: \$595.00
- First Payment Date: .
- Monthly Payment: .
- Balloon Amount: .
- Residual Amount: .
- Account Number: .
- MSRP: .
- Payment Option: Single Pay
- Effective Date: 04/21/22 - 04/21/27

Buttons: Re-generate Contract, Cancellation Quote, Void 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 Active: Submitted, Remitted AND Paid

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

Contract Screen > Cancellation Quote

ONWiseSM
Contract Administration

22741-509 - DEALERSHIP NAME

Welcome Amanda Miller [Logout](#) [Help](#) [Contact Us](#)

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:
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 Cancellation Report:

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.

Contract Screen > Cancellation Quote

ONWiseSM
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: 04/21/2022
Customer: Sample, Sample
Seller: Dealership Name
Lienholder: Lienholder

Cancellation Information

Cancel Date: 05/05/2022
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

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

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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: 05/05/2022
Cancel Odometer: 40,000
Cancel Reason: Paid Off Vehicle

Cancellation Rates

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

CANCELLATION QUOTE WORKSHEET

Contract Information

Contract Number	APP567577	Sale Date	04/21/2022
Customer Last Name		Seller Name	
Customer First Name		Seller ID	
VIN	5J6RM4H31E022901	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
---------------------	----------

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 636-600-4426. If you have any questions regarding this cancellation or the cancellation process, please contact Client Services at 800-849-9559.

Quote saved

Cancellation Report: Cancellation Quote Worksheet - Dv Print

Contract has been in force and are subject to change due to increases in

refund will be issued jointly to the customer and the lienholder/lessor.

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

ONWiseSM Contract Administration

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Main Contract **Remittance** Reports Settings

Create Remittance

Product: ☒ GAP ☐ Etch

Lienholder: ANY

Program: ALL

Plan: ALL DATES

Purchase Date:

Filter

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

Contracts 04/21/2022

Include	Customer	VIN	Purchase Date	Contract #	Plan Description	Term	Lienholder	Total Contract Due	Due From
<input type="checkbox"/>	Sample, Test	5TFJX4GN1DX020098	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](#)

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

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Contract Administration

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Main Contract **Remittance** Reports Settings

Create Remittance

Remittance #: Remittance Search: Automatic and Manual ▼

Product Type: GAP ▼

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

Remittances

Submission Date	Cycle Month	Remittance Number	Product	Contract Count	Total Remit	Reprint
05/05/2022	May 2022	22741-509-005	GAP	1	\$198.00	
05/05/2022	May 2022	22741-509-004	GAP	1	\$223.00	

Sample, Test


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



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Main Quote Contract Remittance **Reports** Settings

Reports

Category:

ADDITIONAL
REPORTS
TO COME



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Main Quote Contract Remittance Claims **Reports** Settings

Reports

Category:

[SCSRPT021 Billing Statement 999999-ONW 202205.pdf](#)
[SCSRPT021 Billing Statement 999999-ONW 202204.pdf](#)
[SCSRPT021 Billing Statement 999999-ONW 202202.pdf](#)

**WE ARE
HERE TO HELP**

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

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Phone: 800-849-9559

Email: ClientServices@WiseFandI.com

CONNECT
WITH US



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

WiseF&I[®]