

To be able to offer financing to your customers, click on the financing tab on the left side of your screen. You will enter this screen where you will be able to click the sign-up button below. Fill out the sign-up form to get your shop approved. Approval may take up to 1-3 business days.

Financing

Sign up now

Wisetack Consumer Financing

Start winning more (and bigger) jobs in just 5 minutes
We've partnered with Wisetack to make offering your customers consumer-friendly financing fast and easy. Once enabled, the option to pay over time will appear on estimates you send between **\$500 and \$15,000**. You get paid in full as soon as the repair is complete, while your customer pays over time.

Compete and close
Stand out from the competition by giving your customers an easy way to access consumer-friendly financing. Win more jobs and boost your average job size, especially in competitive pricing situations. Give your customers the option to finance their deductibles!

Make it easy
Your customers can skip the paperwork, apply on the privacy of their own mobile device and get an approval decision within seconds, all without affecting their credit scores. If approved, they can choose to pay over 3 to 24 months with APRs as low as 0%*.

Get paid, worry-free
Let your customers pay over time so they can get the work they want, while you get paid as soon as the job is done. **The cost to you is only 2.9% per transaction**, and your customers get to choose the rates and payment terms that work for them.

Questions? Contact the Wisetack support team at 1-833-927-0333 (Mon-Fri 9am-8pm ET, Sat 9am-6pm ET), email support@wisetack.com, or see wisetack.com/contact-us.

*All financing is subject to credit approval. Terms may vary. Payment options through Wisetack are provided by our [lending partners](#). For example, a \$1,000 purchase could cost \$45.18 a month for 24 months, based on a 7.9% APR, or \$333.33 a month for 3 months, based on a 0% APR. See additional terms at <http://wisetack.com/fags>.

Once your shop has been approved you will now see this screen below. This screen will allow you to track all your customers' financing requests. In the example below you can see some of the statuses of the loan process, including when the loan has been approved and your shop has been paid by Wisetack.

Financing

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How to get started using Wisetack in Web-Est!

Once you've decided the final price and are ready to start the work, you send your customer a **financing application link**. This can be done three ways.

- **Option 1:** On the Estimate - Payment Info page, click 'Send Financing Application' and enter the customer's mobile number, the estimated date of repair completion, and the amount to finance.
- **Option 2:** On the Estimate - Send Estimate page, click 'Insert Financing Application Link in Email' to insert the link into the body of the email.
- **Option 3:** On the Estimate - Send Estimate page, under the 'Add Report Attachments' section, select the option for 'Include Financing Application Link' and the link will be included on the Estimate PDF.

Click here to see how to get started: [LEARN MORE](#)

The list below shows the financing applications associated with your customers and their estimates.

Estimate	Customer Name	Max Approved Amount	Requested Financing Amount	Approved Financing Amount	Financing Application Link	Status	Application Start Date	Last Update	Expiration Date
12879024		\$14,000.00	\$2,000.00	\$2,000.00	https://wisetack-sec.us/#/s17b6	APPROVED BUT INCOMPLETE	4/28/2023	4/28/2023	5/28/2023
13011692	Unit 12345	\$15,000.00	\$1,000.00	\$1,000.00	https://wisetack-sec.us/#/4qbsl	PAID	4/28/2023	4/28/2023	

1 - 2 of 2 items

The first way to send a finance request to your customers is to click on the "Payment Info" tab at the top of the page while in your estimate. In this page you will see a "Send Financing Application" button. After you click on this button you will be prompted to enter the Finance amount, estimated date of repair

completion, and your customer's cell number. Once you send the finance application your customer will receive a text with the request. They can then click on the link they receive and apply for financing.

Below the "Send Financing Application" button, you will now see updates of your customer's loan request.

The screenshot displays the Web-EST software interface. At the top, the header includes the Web-EST logo, contact information, and a navigation bar with buttons for Customer, Vehicle, Add Parts, and Insurance. A sidebar on the left contains a menu with options like New Estimate, Open Estimate, Frame Data, Parts Search, Reports, Support, Financing, Rates, Vendors, Add Ons, Settings, and Logout. The main content area features a section titled "Win bigger jobs by offering financing" with a "Send Financing Application" button and a "Repair Notes" button. A modal window titled "Wisetack Financing" is open, showing the "Your customer's financing options" section. This section includes a "How-to" guide with three steps: 1. Send a financing application to your customer (no fee to you or impact to their credit score), 2. Customer completes application and is shown whether they are approved and for how much, and 3. Finalize the job and get paid! Below this, there are input fields for "Total Amount to Finance \$", "Estimated Date of Repair Completion", and "Customer's Mobile/Cell Number". A "Send Financing Application" button is at the bottom of the modal. A disclaimer at the bottom of the modal states: "All loans are subject to credit approval. Your terms may vary. Wisetack loans are issued by Hatch Bank, a California-chartered industrial bank. For example, a \$1,000 purchase could cost \$45.18 a month for 24 months, based on a 7.9% APR, or \$333.33 a month for 3 months, based on a 0% APR. See additional terms at wisetack.com/terms".

The other way you can send your customer a finance request is via email. Navigate to the "Send Estimate" tab at the top of the page while inside your estimate. Below the email body you will see a "Insert Financing Application Link in Email" button. This will send the financing application link in the email you send to your customer.

1 Compose

Sent Estimate History

To

CC

SMS

Subject

Body

Win bigger jobs by offering financing

Send this customer an application and see how much they qualify for.

[LEARN MORE](#)



Insert Financing Application Link in Email

Pitch the repair for as low as **\$46.10/month***

Lastly you can include a link in the estimate you send to your customer. You will need to make sure the box is checked that says, "Include Financing Application Link". Once you attach the estimate to the email when this box is checked the link will appear in the PDF.

Estimate	Estimate Description	<input type="checkbox"/> Include Images In PDF	<input type="checkbox"/> Hide Hourly Rates From Report
Authorization Letter	<input type="text"/>	<input type="checkbox"/> Only Selected Images	<input type="checkbox"/> PDR Only
Customer Letter	Select Report Header	<input type="checkbox"/> Attach Images to Email/SMS	<input checked="" type="checkbox"/> Print Parts & Labor Notes
Dealer Letter	Estimate	<input type="button" value="Select Images"/>	<input checked="" type="checkbox"/> Print Header Information
Direction of Payment Letter			<input checked="" type="checkbox"/> Print Inspection Date
EMS			<input checked="" type="checkbox"/> Print Days To Repair
Estimate Approval			<input checked="" type="checkbox"/> Include Financing Application Link
Final Report			<input type="button" value="Attach"/>
Follow Up Letter			
Parts Order			
Thank You Letter			
Work Order Report			
Repair Notes Report			
Custom Reports			