



Get Paid Faster



End-to-End Invoice Automation with Cloud Accounting

From the moment an invoice is created to chasing payments, to finally reconciling the invoice, WiseSync and WisePay work together to automate every step of the invoice lifecycle.

Request a Demo

No accounting platform?

No problem!

Try WisePay for PSA

01

Take back control with an **all-in-one** solution

WisePay automates the management, collection, and reconciliation of credit card and direct debit request (ACH) payments, making it easier than ever before for you to get paid on time, every time.



Automate with zero-touch reconciliation

Each time you handle an invoice, it costs you time and money. WisePay seamlessly reconciles invoice payments in your accounting platform, and automatically creates client invoices for CC surcharge payments, overpayments and prepayments.



Control how you send and receive payments

Transparency equals trust, and that means better business - no one likes hidden fees. Automatically schedule payments based on the invoice terms for each customer; tailor how your business on-charges or absorbs credit card fees and surcharges, and consistently maintain clear communication with your customers.



Put an end to chasing payments

WisePay simplifies payment collection so you can easily manage scheduled payments, with flexible options to automatically schedule payments based on invoice terms for customers withstanding debt agreements for example, enabling you to get paid faster every time (with one system, fewer delays).

02

Make it even easier for your customers to pay you

Automatic payments and simplified payment processes can help solidify new and existing relationships alike by empowering your customers with a secure and hassle-free payment experience that encourages loyalty and trust.



With WisePay, your customers can:

- Easily pay for invoices via Credit Card or Bank Debit
- Save time and bulk pay for invoices
- Send secure payments without a login
- Save, add or edit payment methods (DDR / ACH / and CC payments)
- Set up Automatic Payments and schedule payments in advance
- View and download invoices



Schedule credit card and bank payments

Customers are invited to make an immediate on-the-spot CC payment without an account or login, or alternatively, they can self-register and save their preferred payment method, which makes scheduling future payments straightforward for them - and reduces the risk of overdue payments for you.



An end-to-end PCI-compliant solution

Assure your customers are protected with a secure, PCI-compliant payment platform trusted worldwide. Not to mention fewer delays and greater payment flexibility with more options to choose from.

03

WISEPAY FEATURES

Payment Capabilities	WisePay	WisePay for PSA
Accept Credit Card & ACH payments	✓	✓
Receive customer payment <i>with</i> or <i>without</i> an invoice	✓	
Batch pay multiple invoices	✓	
Schedule payments (CC/bank)	✓	✓
Partial payments	✓	✓
Make payment to invoice not in Accounting Package (prepayments)	✓	✓
Make payment from Xero Payment Services ('Pay now' on invoice)	✓	
Set payment limits for card / bank transactions	✓	✓
Guest payment (pay without logging in)	✓	✓
Self Registration (register as a user without an invite)	✓	✓
Customizable terms & disclaimers (contract options)	✓	✓
Make payment to invoice scheduled for Auto-Pay (pay early)	✓	✓
A Payer can download copies of invoices (by invoice source)	✓	✓
Transparent fee structure	✓	✓
Flat CC fees for all card types (blended rates)	✓	✓
Autopay invoices based on PSA invoice terms	✓	✓
Payment applied in accounting software	✓	
Payment applied in PSA	✓	✓

04 WISEPAY FEATURES

Sync Capabilities

	WisePay	WisePay for PSA
Sync invoices to Xero or QuickBooks Online from PSA	✓	
Manage taxes & rounding for invoice validation	✓	
Automatic & on-demand integration sync capabilities	✓	
Send and manage invoices from your PSA	✓	✓

Notifications & Reminders

Configurable custom event notifications	✓	✓
Payment Successful / Failed / Upcoming	✓	✓
Invoice past due /collection notifications / CC expiry reminders	✓	✓

Support Availability

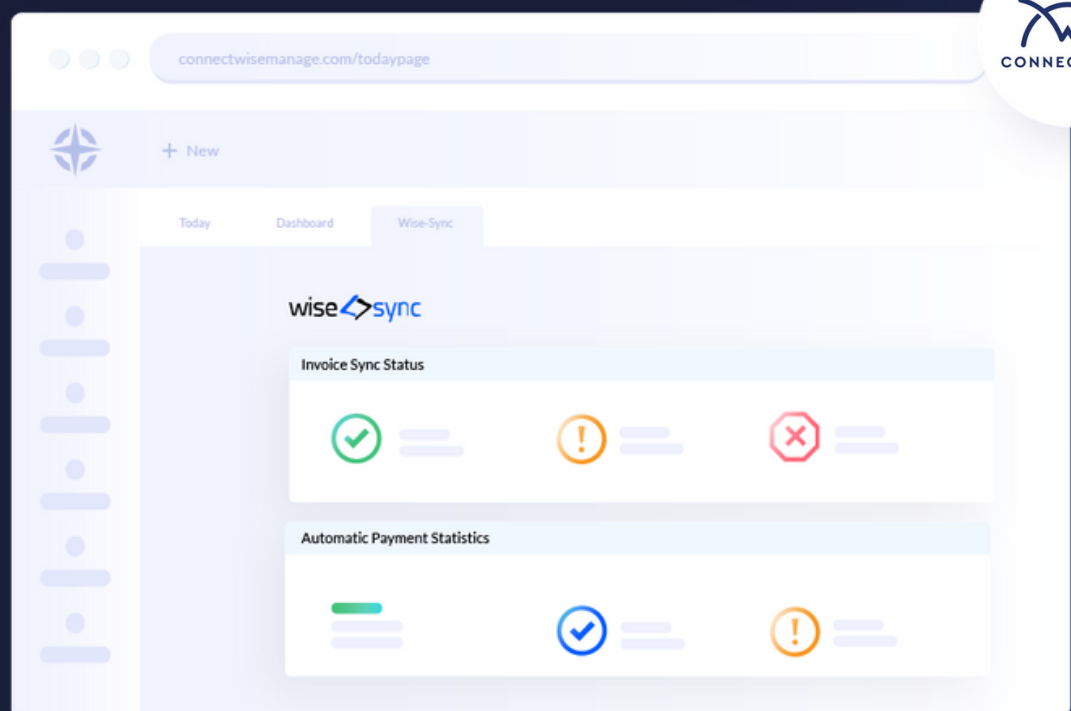
24-5 Support	✓	✓
Detailed Knowledge Base for Payers & Merchants	✓	✓

Regions Supported

• United States of America (CC/ACH)	✓	✓
• Canada (CC/ACH)	✓	✓
• Australia (CC/DDR)	✓	✓
• New Zealand (CC/DDR)	✓	✓

05

Sync financial data **in real-time** from your PSA to Xero or QBO



Your Sync Dashboard inside of ConnectWise PSA gives you instant financial visibility. View your invoice sync status at a glance, with up-to-the-minute quick links for taking immediate action; whether that's a warning or an error, you'll know exactly what's happening and how to fix it - fast. After you've corrected an error, easily re-sync, right within ConnectWise PSA.

[Book a time](#) to learn about advanced sync capabilities between Xero or QBO and ConnectWise PSA.

06

WHY WISEPAY

*"It really has been one of the most **impactful tools**."*



When Matt's bookkeeper of nine-and-a-half years resigned, he unearthed 'a manual disaster,' one 'big mess' everywhere from his PNL to his general ledger, that led to the ultimate decision: "I had to pursue automation." Now, on the other end of his journey, Matt's no longer "burdening those convenience fees," while reaping overall cost-savings of \$45.6K+ per year - [and that's just the beginning](#).

"I hate to use the phrase 'life-changing,' but it really has been one of the most impactful tools that I've put into place for my business. Now, I have valuable insights that I wasn't able to access before."

Matt Maupin | President, Matador Networks

To learn more, chat to us today!

[Request a Demo](#)