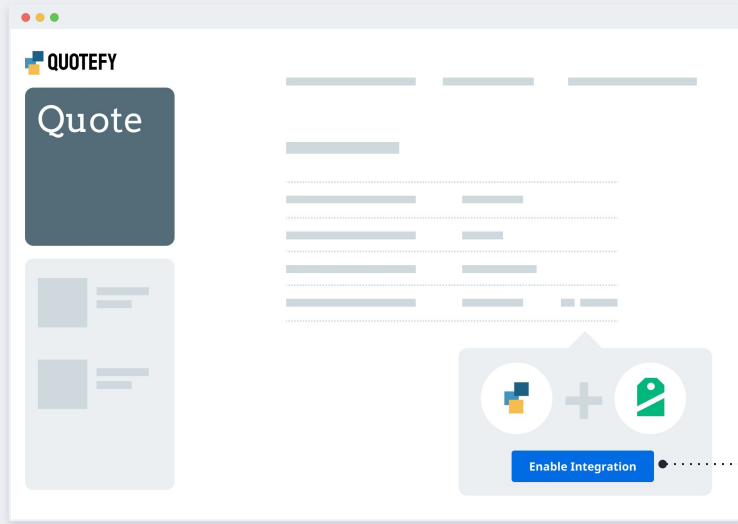


API Integrations

Quoting Software / CRM Integration Walkthrough

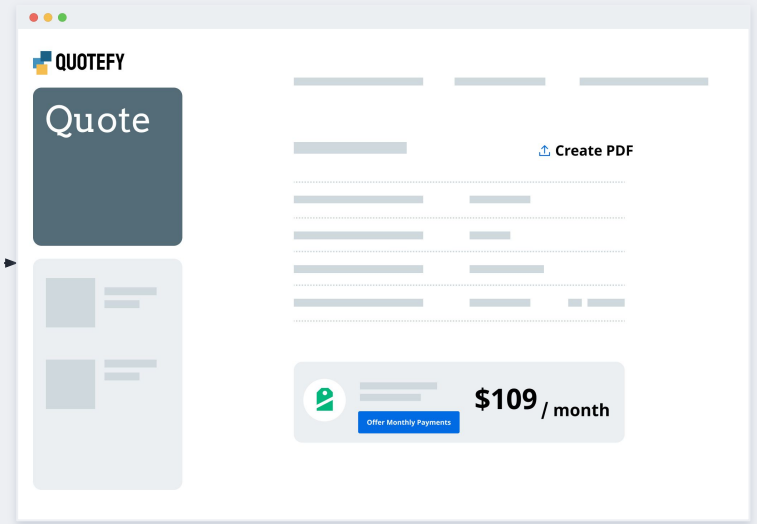
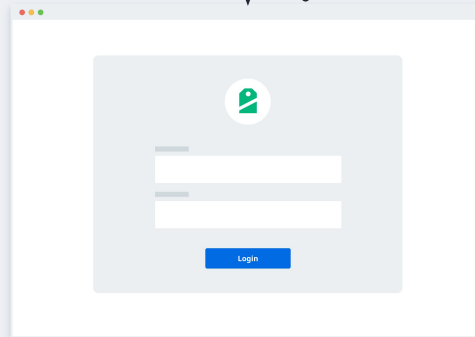
Prepared by: Lee Zwaigen
June 2024

API Integration Flow | Authentication



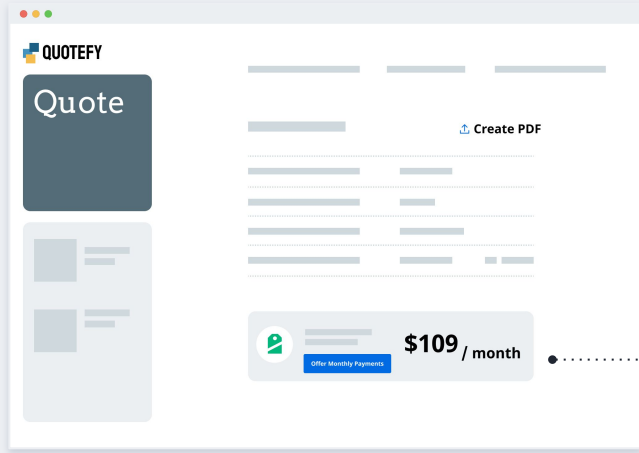
Merchants enables the Financeit integration directly through the Quoting software

Merchant logs in
(with 2-factor authentication)
authenticates Financeit connection

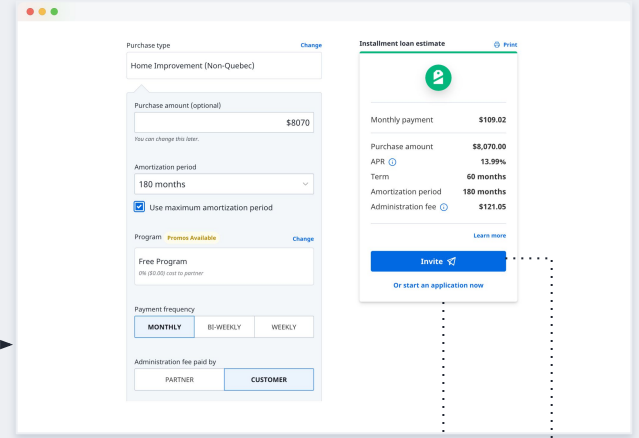


Merchant builds quote , which automatically embeds Financing with payment amount

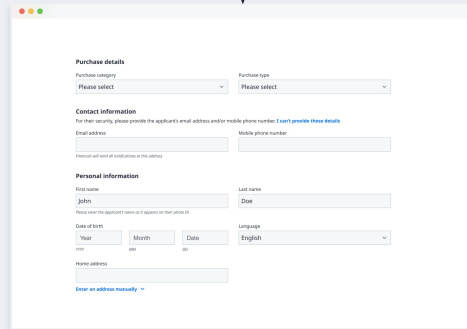
API Integration Flow | Loan Application



Merchant, with 1-click can get access to an overlay of the Financeit-hosted interface without the need to log-in

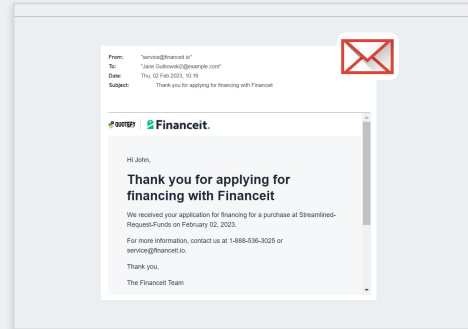


A



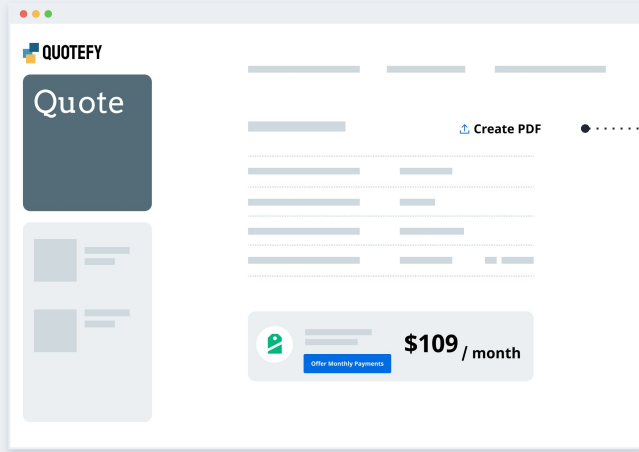
Merchant-led application: Merchant arrives at Financeit's merchant-led application, with fields pre-filled including lead_id

B

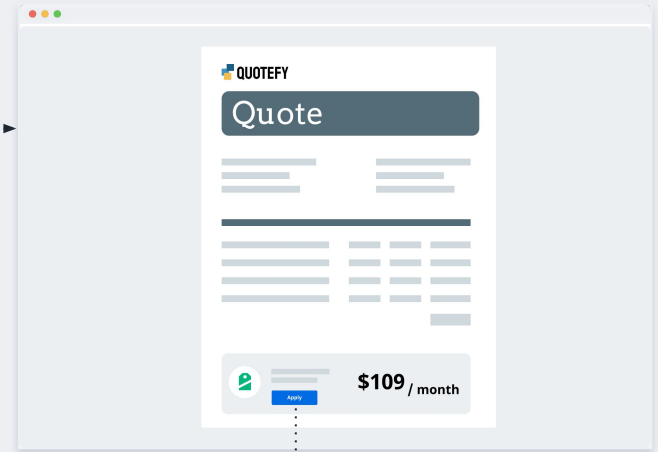


Customer-led application: Merchant invites customer to apply

API Integration Flow | Digital quote

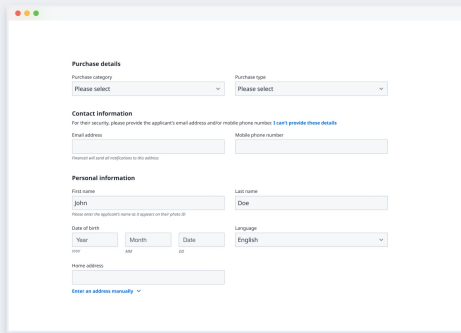


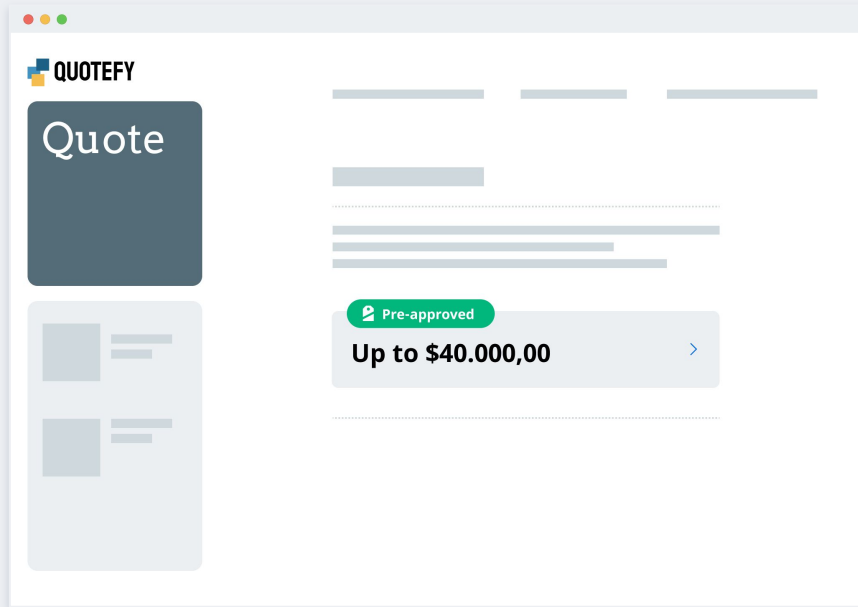
Merchant generates quote and sends to Customer



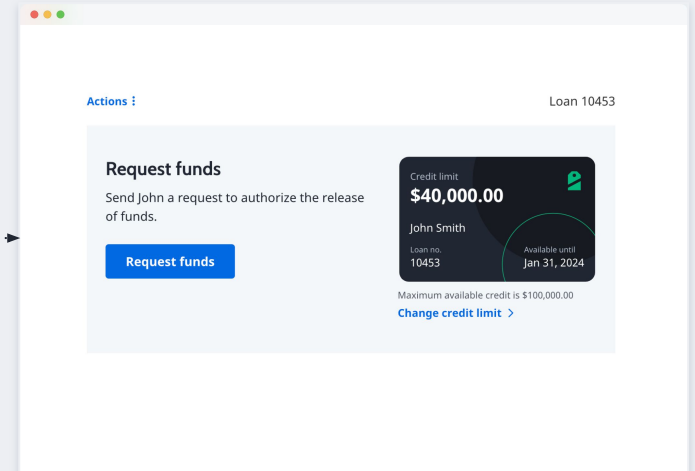
Customer-led application: Customer arrives at FIT-Direct application, with fields pre-filled including lead_id

Customer applies and sets up the loan on their own device



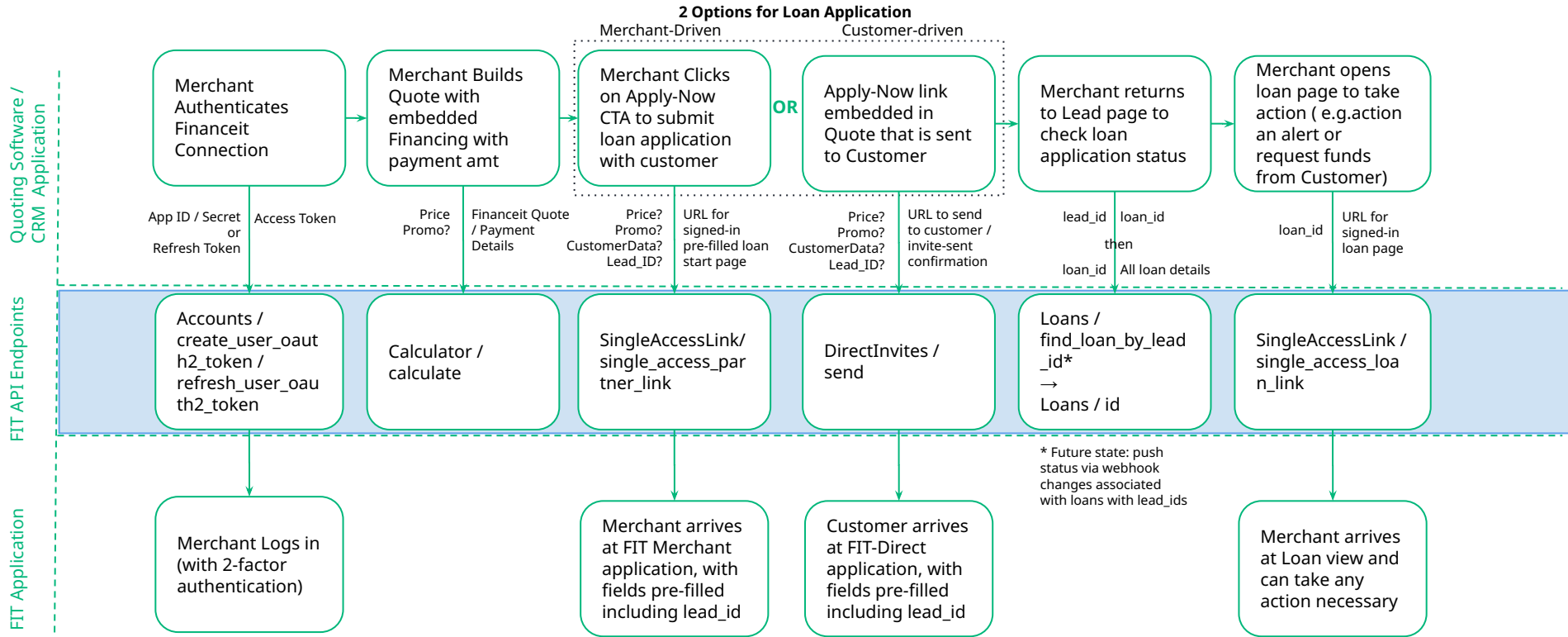


Merchant returns to Lead page to check loan application status



Merchant clicks to arrives at Loan view and can take any action necessary, e.g.request funds from Customer - (no need for merchant to log-in to Finaciteit)

3rd Party Integration - API endpoints for Quoting/CRM Software



Appendix

3rd Party Integration - API endpoints for Quoting/CRM Software w/ Promo Program Management

