Wells Fargo-Carrier- New Application Process (for Technicians)

This document will be available in Pitchbook under “Memos” then “Financing Information” under Wells Fargo “Wells Fargo-Application Process”

Creating Password

- You should have received an email-Username is “carrfirstnamelastname” ex: carrjohnsmith
    - From email click link and then hit “first time login”-enter username and click continue
    - Verify your identity-go to work email to get code and enter code and then make your own password-one you will remember (WF will make you change your password every 60 days-suggest putting a 1 after your password and then in 60 days change to a 2 and so on.)
- Go to Safari and follow directions on WF Credit Connect iPad instructions sheet to add the application to your homepage-this will be available in Pitchbook

Customer Application

- **BEFORE** starting application process your will need:
    - The estimate or job number from Kickserv
    - The exact amount of the invoice
    - The “plan number” for the terms you are offering from pricebook-Look up current plan numbers in pricebook under Financing
- Hit “Submit Application”-**you will NEVER use “process a transaction”**
- Merchant Information tab-you will fill out; Customer information tab- the customer will fill out-Make sure you pay attention to when it automatically changes. Click continue on Merchant information page.
- Sales Person ID- “YOUR FULL NAME” (if shared sale you can still only put one name in-this does not affect commissions); Est Purchase Price- “**PUT IN $500-$1000 MORE THAN ESTIMATE AMOUNT”** click continue
- Hand iPad to customer and have them fill out all information for application on next 7 pages (if co-applicant it will be more).
    - They will be agreeing to e-signing all documents with this application.
    - Email validation-MUST be a valid email, WF will validate the email before allowing customer to move on in app.

    - The last page of customer application will state the 28.99% interest that will only come into play if they default on their payments. (The terms they are agreeing to will show up later in the process.)
- Once the customer gets to the “Thank You!” page they MUST hand the iPad back to you-click continue.
- You MUST verify the customers identity by seeing a Driver’s License/ID-click continue.
- Application Status Page- will show you if they were approved or declined and the amount they are approved for-you can verbally tell the customer this amount. **CLICK “AUTHORIZE ONLY”-NEVER CHOOSE THE OTHER OPTION!!!!!!!!!!!!!!!!!!!!!!!**
- Authorize for Future Delivery page-
    - Amount- **the EXACT amount of the estimate**
    - Plan Number- The plan number is a code for WF that lets them know what terms the customer agreed to. **IT IS VERY IMPORTANT TO GET THE PLAN NUMBER RIGHT**. Look up current plan numbers in pricebook under Financing (You should have already looked this up prior to starting application)
    - Ticket Number-the job number in Kickserv
    - Sales Person ID- your full name-click continue
- Review Authorization-Review the information is correct and click continue
- Authorization Status & Signature-Hand iPad back to customer to review this information-Under “Cardholder Terms” make sure the terms are exactly what you offered the customer-ex: 0% for 60 months. Have customer hit agree at bottom of the page and hit continue.
- Make sure you sign off after the Transaction Completed page.