

Wells Fargo Trane- 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 “tranefirstnamelastname”
ex: tranejohnsmith
 - From email select 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

Please note the requirements that must be met for the customer to apply for credit through Wells Fargo Credit Connect (hereby known as WFCC):

1. The applicant must be comfortable using your device when applying for credit.
 2. The applicant must provide a personal, valid email address.
 3. The applicant must electronically consent to receive the terms and conditions and Privacy Notice via email.
- **BEFORE** starting the WFCC application process you 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
 - Login to WFCC by going to: wellsfargo.com/creditconnect.
 - Hit “Submit an 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.

- 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 (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% APR 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.