

Wells Fargo Retail Services

Credit Connect

Paperless Credit Card Account Application and Transaction Processing

Save the URL as a favorite

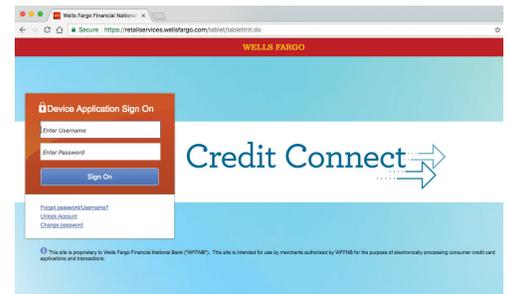
Save this URL: wellsfargo.com/creditconnect as a favorite with a name such as “Wells Fargo Credit Connect.” This will help to ensure that you are logging into the correct system.

Follow all instructions at the top of the screen

After clicking on the above URL, follow all instructions in light blue text at the top of the Credit Connect screen. Instructions will indicate who is to complete and/or review the screen.

All 4 requirements must be met in order to use Wells Fargo Credit Connect

1. You must have an approved electronic device such as a tablet. Smartphones are **not** compatible. You cannot use a customer’s device.
2. The applicant must be comfortable using your device.
3. The applicant must provide a valid email address.
4. The applicant must consent to electronic disclosures and provide an electronic signature.



It is important to have both the paperless and paper-based credit card documents and equipment readily available to easily accommodate any customer situation. If the applicant can't provide an email address, does not have an email address, is not comfortable with using your device, or does not want to provide an electric signature, use the paper application and/or invoice process. When using your standard paper-based process, it is critical that you have the customer complete a paper copy of the credit card application and ensure they receive their terms and conditions. Please sign on to the Online Resource Center at wellsfargo.com/retailservices to submit a paper-based application for a credit decision. Save this link as a favorite with a name such as “Paper Process.”

Together we'll go far



Approved cardholders can also sign electronically for a charge. You will be able to submit an Authorization or an Authorization and Charge (depending upon your access).

1. By choosing Authorize Only, you are reserving a portion of the available credit line until the product/service is received by the cardholder.

2. By choosing Authorize and Charge, the cardholder receives their product/service that day.



Processing a transaction — Cardholder receipt

ABC Home Improvement 123 Main Street Des Moines, IA 50309 (515) 222-1234	
Date:	1/30/2017
Transaction Type:	Deferred Delivery
Customer Account Number:	9999
Authorization Number:	999999
Ticket Number:	1234
Plan Number:	9999
Net Amount of sale:	\$1.00
Sales Person ID:	John
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Cardholder Terms	

Don't submit a charge for payment until the product/service has been received by the cardholder unless otherwise expressly allowed in your agreement with Wells Fargo. A copy of the receipt, which includes the cardholder terms, will be emailed to the cardholder.

Questions?

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