



## How to Sign Up For Wells Fargo Consumer Financing – Checklist

### Complete the Enrollment Kit

- Log into ComfortSite
- Click on Financial Center
- Click on the menu item “Consumer Financing”
- Click on Enroll Now
- Print out pre-populated application

If pre-populate information is not correct, please update it in ComfortSite and wait 24 hours to re-print. If you have any other issues please contact ComfortSite Support. Pre-populated information cannot be manually changed on the form. Only pre-populated applications will be accepted by Wells Fargo.

- Fill out the fields on the application that are not already pre-populated
- Sign the application

### Fax the Enrollment Kit & Additional Documents to Wells Fargo (1-877-279-4548)

Please Include:

- Application
- ACH Funding Information/Voiced Check
- Complete and Signed W-9
- Copy of Contractor’s License (if required locally)
- Any additional information needed (New in Business Questionnaire needed if dealer has less than 2 years in business, available on ComfortSite)

### Complete Wells Fargo Introduction Call (Wells Fargo will contact dealer)

- This introduction call will ask a handful of questions inquiring how the dealer plans to utilize financing as well as reviewing the application.

### Receive Approval Information in about 2 weeks

- Package of Program Documents (Startup Kit)
  - Homeowner Application
  - Charge Slip
  - Instructions

### Complete Wells Fargo Training Session

- Wells Fargo will contact approved dealers to sign up for a 60 minute training session for a program and documentation overview.
- Failure to complete the training will result in the dealer not being activated on the program.

### Receive Wells Fargo System Credentials

Includes:

- 4 Emails
  - Wells Fargo Merchant #
  - Setup Password (Internet Processing System – IPS)
  - PIN (Voice Response Unit – VRU)
  - Access Code (VRU)

### Complete IPS First Time Login

- Log into ComfortSite
- Click on Financial Center
- Click on the menu item “Consumer Financing”
- Click on Link to Wells Fargo
- Click on First Time Login (utilizes password in above mentioned emails)
- Follow Setup Prompts to change Password and User ID

### Start Using Financing

If you have any questions call Wells Fargo at 1-800-577-5313 8am – 5pm CST, your Territory Manager or an Ingersoll Rand Financial Services Regional Manager.

