



LEADERS HOLDING CO.TM

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Wells Fargo Financing

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Minimum amount financed

	Total Purchase Amount After Deposit	Plan #
12 Month Plan	\$500 or more	1015
36 Month Plan	\$5,000 or more	4032

Required Deposit

Type of Order	Required Deposit
All Items in Stock	\$10.00
Some Items In Stock some Items Special Order	\$200 or 10% of the Subtotal whichever is less
All special order	\$200 or 10% of the Subtotal whichever is less

Splitting an Order into More Than One Fulfilment

Splitting a sales order into more than one fulfilment will cause the customer to receive a payment statement for each fulfilment. Wells Fargo only invoices for the amount delivered.

For each fulfilment the Balance Due field on the invoice must meet the following minimum value, or it should be paid in full before scheduling.

	Total Purchase Amount After Deposit	Plan #
12 Month Plan	\$500 or more	1015
36 Month Plan	No minimum value required	4032

How Are Payments Calculated?

Plan	Amount Financed		Term	Payment
Example	\$3,300	/	12	\$275
12 months		/	12	
36 months		/	36	

On the 12-month plan, the minimum monthly payment is 3.5% of the order total or \$40, whichever is greater. The amount financed must be paid off within the promotional term. Making minimum monthly payments may result in finance charges after the interest free promotional period.

How to Apply

1. The guest will scan the Wells Fargo QR code posted in your store using their own device.
 - a. Each QR code is unique to the location
2. Follow the prompts
 - a. Household income: Even if applying as an individual the entire household income can be entered.
3. A response should be received in seconds.
 - a. Response:
 - i. Approved
 - ii. Pending:
 1. If the response is pending, the application is being reviewed by a person.
 2. This takes up to 10 minutes and then a response should be received
 3. Wells Fargo may call the applicant during this time to verify data
 4. If no response is received, you can call (800) 551-5111 to inquire
 - iii. Denied
 1. (800) 551-5111 can be called for further review

Processing a Transaction and Applying Financing to a Sales Order

Reserve Funds

To completely process a transaction, you will need to reserve the funds in the guest's credit line. If you do not reserve the funds for your order the guest could use the credit at another business and go above their credit limit.

1. Log into Wells Fargo using the link on your NetSuite dashboard or going to the URL below.
 - a. <https://retailservices.sec.wellsfargo.com/tablet/login>

The image shows a mobile device screen displaying the Wells Fargo Credit Connect login interface. At the top is a red header with 'WELLS FARGO' in white. Below it, the text 'Wells Fargo Credit Connect' is centered. A large 'Hello' greeting is prominently displayed. Underneath, there's a section titled 'Please sign in' with two input fields: 'Enter Username' and 'Enter Password'. At the bottom, there are links for 'First Time Login?', 'Forgot Password?', and 'Need Help Signing on?'. A red 'Sign On' button is located at the very bottom of the form area.

2. Click "Process a Transaction"
 - a. Follow the prompts
 - b. The guest should have the account number from the approval they just received, or you can fill out any 3 identification fields
3. Click **Authorize Only**
4. Fill out the fields and press **Continue**

Field	What?
Amount	The amount due on the order after the deposit
Plan Number	12 Month: 1015, 36 Month 4032
Ticket Number	Sales Order Number
Salesperson ID	Your first and last name with no spaces Example: JohnSmith

5. Confirm the information and click **Continue**
6. You now see the agreement for the financing for the sales order.
 - a. Review the Electronic Agreements and Disclosures
 - b. Enter the customer's email
 - c. Review the Consent to Terms

retain records in electronic form. By "Current Version" we mean a version of the software that is currently being supported by its publisher.

6. **Method of Consent.** You consent to receive Cardholder Terms electronically by checking the box below and selecting the "Continue" button. By providing your consent, you are also confirming that you have the hardware and software described above, that you are able to receive and review electronic records, and that you have an active email account.

1 **Electronic Agreements and Disclosures**

☐ I consent to receive the Cardholder Terms electronically. By checking this box, I acknowledge that this is my electronic signature.

2 **Email Validation**

Please enter a valid email address below.

The transaction details and Cardholder Terms will be sent to the valid email address you enter.

Email: *

*Email

*Confirm Email

3 **Consent Agreement**

By selecting 'Agree,' you agree to the transaction details and Cardholder Terms above, and you agree that this transaction is under your Credit Card Agreement with Wells Fargo Bank, N.A. (the "Bank").

☐ Agree ☐ Disagree

After you verify the information above, select 'Continue' and hand the device to the merchant.

Continue

7. Click **Continue**
8. On the Authorization write down the approval code to enter in NetSuite.

Adding the payment to NetSuite

1. Write a sales order in NetSuite
 - a. For detailed instruction on how to write a sales order
 - i. R:\3 About Customers and Orders\3.1 Writing a Sales Order
2. On the “3. Shipping/Billing/Signature” subtab in the Financial Information section
 - a. Choose the correct Terms from the drop-down menu
 - i. 12 Month
 - ii. 36 Month
 - b. Enter the Wells Fargo approval code in the Wells Fargo Approval Code field

The screenshot shows the NetSuite interface for the '3. Shipping/Billing/Signature' subtab. A green arrow points to the '3. Shipping/Billing/Signature' tab in the top navigation bar. A yellow arrow points to the '12 Month Financing Wells Fargo' option in the 'TERMS' dropdown menu under the 'Financial Information' section. A red arrow points to the 'WELLS FARGO APPROVAL CODE (ENTERED BELOW)' field, which is highlighted in red. The interface includes sections for 'Shipping Information', 'Billing Information', 'Financial Information', and 'Signature'. The 'Shipping Information' section contains fields for 'SHIP TO SELECT', 'SHIP TO *', and 'SHIPPING COST'. The 'Billing Information' section contains fields for 'BILL TO SELECT', 'BILL TO *', and 'DELIVERY NOTES'. The 'Financial Information' section contains a 'TERMS' dropdown menu and a 'TAX' field. The 'Signature' section contains a 'CUSTOMER SIGNATURE' field with a text editor.

Writing a new sale using an existing account

Did you know Leaders’ guests have an average of \$3,000 of open credit limit they are not using? Level up your customers space, add throw pillows, rugs, lighting, and art with low monthly payments on their existing account.

1. Write a new sale for the additional product.
2. Follow **Processing a Transaction and Applying Financing to a Sales Order** on page 3 of this document.

Cancelling Authorizations

You cannot partially cancel any authorizations; it is all or nothing. If the complete amount of the authorization is not utilized the open balance will expire in 8 months.

1. Click on “Cancel an Authorization” on the left navigation menu
2. The previous week’s authorizations will be displayed by default. Select the date range you would like to search
3. Once you locate the customer’s account, click on the ‘Cancel Authorization’ link next to the customer’s account.
 - a. The status of a cancelled authorization can also be verified by clicking on the “Recent Authorizations” link within the “View Transactions” area on the Reports tab.

Wells Fargo Helpline

- ✓ If you have questions or need assistance with the Internet Processing System, please contact the Client Processing department at 1-800-551-5111 and follow the prompts
- ✓ Client Processing is available:
 - Monday to Saturday and holidays: 8:00am – 10:00pm Central Time
 - Sunday: 10:00am – 10pm Central Time
 - Closed Easter, Thanksgiving and Christmas