Wells Fargo Retail Services

Internet Process System (IPS)

Learn how to train your office staff on submitting applications, creating authorizations and processing transactions using IPS. Use the following test information to practice filling out applications and processing transactions on the Online Resource Center at wellsfargo.com/retailservices.

How to submit an application

Step 1:

- Go to Submit an Application under the Internet Processing System tab
- Application code: **Enter the current 4 digit code from the Wells Fargo credit application.**
- Application type: **Individual or Joint**
- Purchase price: **Enter whole number(no decimal or cents)**
- Sales person: **Enter sales person name or ID**

Step 2:

- Name: **Joe A. Smith**
- Date of birth (DOB): **01/01/1980**
- Social Security number: **999-99-9990**
- Housing status: **Own or Rent**
- Physical street address: **123 Main St.**
- City: **Beverly Hills**
- State: **CA**
- ZIP: **90210**
- Email address: **Enter email address if provided by customer**
- Phone number: **555-555-5555**
- Employer: **ABC Construction**
- Work phone number: **555-555-5555**
- Net annual income: **80000**

Step 3:

- Select Continue
- Review the application information for accuracy and select Submit.
- A credit decision will then display with full customer account number and credit limit, if approved.

How to create an authorization

- Go to Process a Transaction under the Internet Processing System tab.
- Search for the cardholder by entering their full credit card account number or search by exactly 3 of the 7 cardholder criteria. Enter test account number 9999999999999999 and select Submit.

- Select Authorize for Future Delivery on the left navigation.
    - I.   Amount: **1200.00**
    - II. Plan: **1015**
    - III. Ticket number: **1111**
    - IV. Sales person ID: **Enter sales person's name or ID**
    - V.   Choose to include **Name on receipt**

- Select Submit to obtain an Authorization.
- Once account is authorized, print two copies of the receipt. Have the customer sign one copy for the business and the customer keeps the second copy.

Process a transaction

- Search for the cardholder by entering their full credit card account number or search by exactly 3 of the 7 cardholder criteria. Enter test account number 9999999999999999 and select Submit.

- Select Authorize for Future Delivery on the left navigation.
    - I.   Amount: **1200.00**
    - II. Plan: **1015**
    - III. Ticket number: **1111**
    - IV. Sales person ID: **Enter sales person's name or ID**
    - V.   Choose to include **Name on receipt**

- Select Submit to obtain a final receipt.
- Once charge is submitted, print two copies of the receipt. Provide one copy to the customer and keep one copy for the business.