

Registering for CTSLink Direct Access

Wells Fargo business groups and their external business partners use this procedure to register for access to CTSLink Direct, a private service provided by Wells Fargo Corporate Trust Services. This web-based file transfer application is offered to Wells Fargo business groups and their external business partners to exchange data in a private and secure environment.

The CTSLink Customer Service team is available to answer questions regarding this service and can be reached at:

- Toll free: 866-846-4526
- Email: ctslink.customerservice@wellsfargo.com
- Hours of operation: Monday – Friday from 8:00 a.m. – 6:00 p.m. Eastern Time.

Registering for Access to CTSLink Direct

1. Access <https://direct.ctslink.com/>.
2. From the left-hand menu, click the **Register for access** link.
3. Read the disclaimer and click **Accept**. **Note:** Clicking **Decline** terminates the registration process.
4. In the **Account Contact Information** screen, complete the required fields noted with an asterisk.

Field	Action
User ID	<i>(Required)</i> Enter a user ID that is a minimum of six characters and does <i>not</i> contain any spaces. <i>Example:</i> jsbach
Email	<i>(Required)</i> Enter your business email address.
Confirm Email	<i>(Required)</i> Confirm the email address.
First Name	<i>(Required)</i> Enter your first name.
Last Name	<i>(Required)</i> Enter your last name.
Company	<i>(Required)</i> Enter the name of the company with which you are affiliated.
Business Type	<i>(Required)</i> Select a business type.
Location	<i>(Required)</i> Select either International or United States from the dropdown list
Mailing Address	<i>(Required)</i> Enter the mailing address of the business.
City	<i>(Required)</i> Enter the city where the business is located.
U.S. State	<i>(Required)</i> Select the state where the business is located.
State or Province	Enter if the business is not located in a U.S. state.
Zip or Postal Code	<i>(Required)</i> Enter the zip code or postal code.
Country	<i>(Required)</i> Enter the country where the business is located.
Primary Telephone: Mobile or Landline	<i>(Required)</i> Select either Mobile or Landline from the dropdown list.
Location	Select a location for the telephone line from the dropdown list.
Country, Number, or Ext.	<ul style="list-style-type: none"> • In the first field, enter the country code for the number, if applicable. • <i>(Required)</i> In the second field, enter the main phone number.

	<ul style="list-style-type: none"> • In the third field, enter an extension, if applicable.
Alternate Telephone	Repeat the steps for Primary Telephone , entering the information in the Alternate Telephone fields.
Account Activation Code 1. Preferred Phone 2. Delivery Method	<ol style="list-style-type: none"> 1. <i>(Required)</i> Select a preferred phone number from the dropdown list to receive the validation code. It should be either a business line or a business-assigned mobile phone. 2. <i>(Required)</i> Select a delivery method, such as voice or text message, from the dropdown list to receive the validation code

Note: Before clicking **Continue** be near the preferred phone entered in the contact form.

5. Click **Continue**. The **New User Setup** screen opens.

6. Note the validation code received via the preferred phone and delivery method.

7. In the **New User Setup** screen, **Validation Code** field, enter the validation code.

8. Click **Continue**.

9. On the next **New User Setup** screen, create a password using the **Password Requirements** located on the right-hand side of the screen.

Password Requirements	
Must contain	8 – 15 characters
Three of the following	At least one: <ul style="list-style-type: none"> • Upper case letter • Lower case letter • Number • Special character, such as !, *,), %, or \$
Cannot contain	<ul style="list-style-type: none"> • Your first name, last name, or user ID • Your previous six passwords • The name of a month • Three or more repeating characters, such as 000, AAA, or \$\$\$

10. Click **Create**.

11. At the thank you for registering message, click **OK**.

12. At the email verification code confirmation message, click **OK**.

If	Then
A token code is sent to the registered email	<i>(Required)</i> Enter the token code in the Email Verification Code field.
No token code is received	<ol style="list-style-type: none"> A. Click the Please Re-send button to receive a new token code. B. Enter the new token code in the Email Verification Code field.

13. Click the **Complete Verification** button.
14. At the thank you message, click **OK**.
15. Contact your Wells Fargo relationship manager and advise them that you have successfully signed up for CTSLink.
16. Provide the relationship manager with the newly created user ID and email address tied to the user ID. **Note:** An email is sent to you after access to your library has been approved.

End