


## Marking a transaction as Personal

- In WellsOne, click the Expenses tab
- Select the transaction you need to reconcile
- Click the Spend Wizard button

| Coding | Details |
|--------|---------|
|--------|---------|

 Policy alert

Spend Wizard

Expense template


- Select Personal

Personal  
\*\*Credits cannot be marked as Personal\*\* This is not for Per Diem. Please use Per Diem option

☆ >

- Indicate the portion of the transaction that should be marked as Personal

Personal

\*\*Credits cannot be marked as Personal\*\*  Allocate remaining balance (34.98 USD) Please use Per Diem option

Personal Charges

USD  
0.00

Add a comment

\*\*Credits cannot be marked as Personal\*\*

Allocated

0.00 USD

Remaining balance

34.98 USD

- Click the Next button at the bottom of the screen

NEXT

- Answer the following if not already defaulted. If not defaulted, select either NOT, Research or Study Abroad

Is it Research or Study Abroad

NOT

Ext Research or Study Abroad

✕

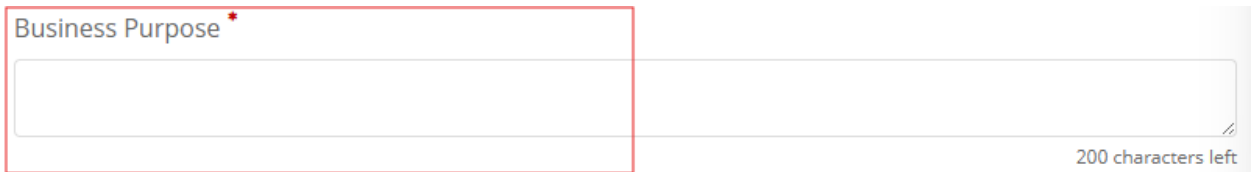
- If you are not splitting the transactions between index numbers, please do nothing with this question

Are you Splitting accounting?

+

- The index number and GL code from the spend wizard should remain
- Click the X next to Department/Funding source

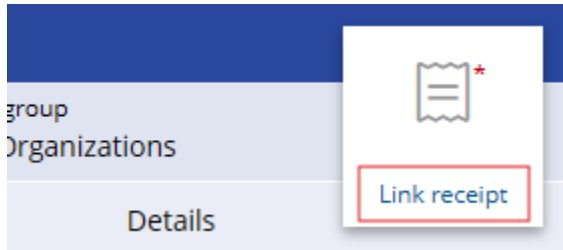
- Click The +
- Click and Select Controller's office
- Enter the business purpose – be as specific as possible



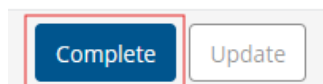
Business Purpose \*

200 characters left

- If the transaction is \$75 or greater, please attached a pdf or jpg copy of your receipt



- When transaction has all details completed, click Complete
  - If you have more information to add, click Update to save what you have done so far



Complete Update

- If you receive an invalid code combination, it's most likely the index and department.
  - Click the X beside the Department/Funding source.
  - Click the + for Department/Funding source
  - Click on and Select the department listed
- Clicking Complete sends the transaction to your approver.
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