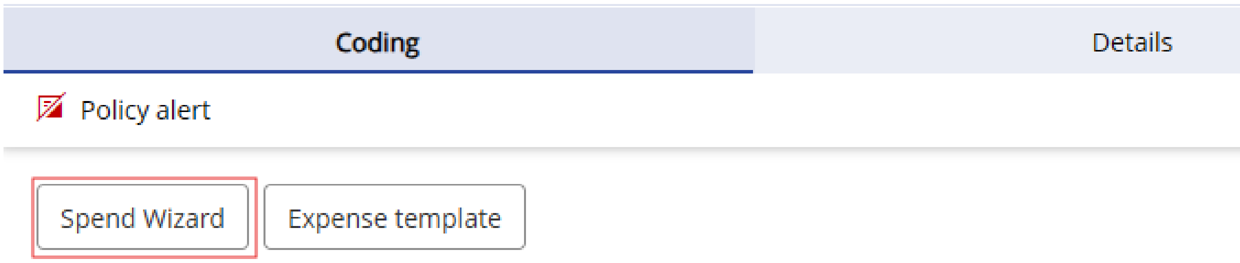
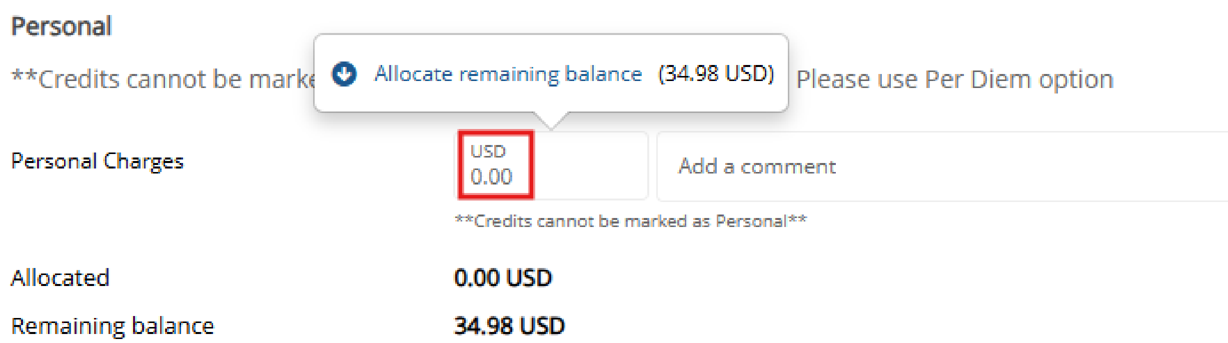
Marking a transaction as Personal

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



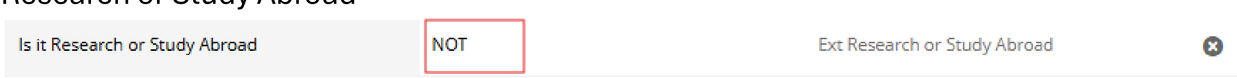
- Select Personal

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

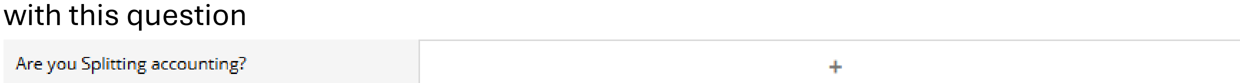


- Click the Next button at the bottom of the screen

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

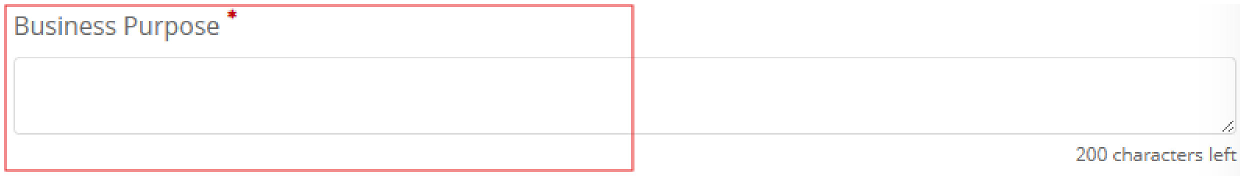


- If you are not splitting the transactions between index numbers, please do nothing with this question

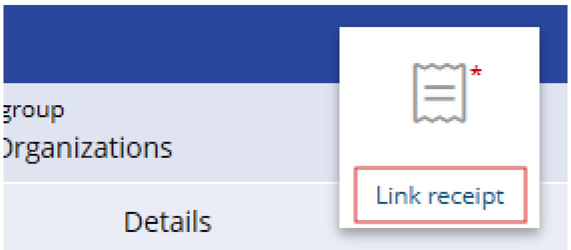


- The index number and GL code from the spend wizard should remain
- Click the X next to Department/Funding source

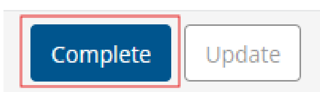
- Click The +
- Click and Select Controller's office
- Enter the business purpose – be as specific as possible



- 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



- 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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