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 te	mplate	
Select Personal		
Personal **Credits cannot pe marked as Personal** This is not for Per Diem. Please use Per Diem option		☆ >
Indicate the portion of the tran	saction that should be mar	rked as Personal
Personal		
**Credits cannot be marke 🔮 Alle	ocate remaining balance (34.98 USD)	Please use Per Diem option
Personal Charges	USD 0.00 Add a cor	nment
	Credits cannot be marked as Person	al

Allocated	
Remaining balance	

• 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

0.00 USD 34.98 USD

Is it Research or Study Abroad	NOT	Ext Research or Study Abroad	8
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+

• 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



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

group Organizations	*	
Details	Link 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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