

Marking a portion of a transaction as Personal

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



- Enter the amounts of the split either by percentage or amount. Click the Split button

Amazon Mktpl

Amount11.61 USDDate09/30/2025IssuerWellsOne Visa (3739)MerchaRet

Coding

Policy alert

Spend Wizard

Expense template

1

Amount incl11.61USD

TaxN/AV

Tax amount0.00USD

Split

Personal

Is it Research or Study Abroad

Index Number

GL Code

Supplier Details

Purchase Amazon Mktpl

Business Purpose*

Policy alerts (2)

FYI Bank info must be on file

No comments added.

Add a comment

FYI Please use spendwizard

No comments added.

Complete

Update

Description is required.

Split

Line 1

USD5.81

%50.04

Line 2

USD5.80

%49.96

+ Add line

Split evenly

Balance: 0.00 USD

Split

Cancel

- The transaction will look similar to this. Click the Personal button for the correct portion.

Spend Wizard
Expense template

1
✕

Amount incl
5.81

USD

Tax
N/A

Tax amount
0.00

USD

Split

Personal
 ☐

Is it Research or Study Abroad

+

A required code is missing.

Index Number

GL Code

2
✕

Amount incl
5.80

USD

Tax
N/A

Tax amount
0.00

USD

Split

Personal
 ☐

Is it Research or Study Abroad

+

A required code is missing.

Index Number

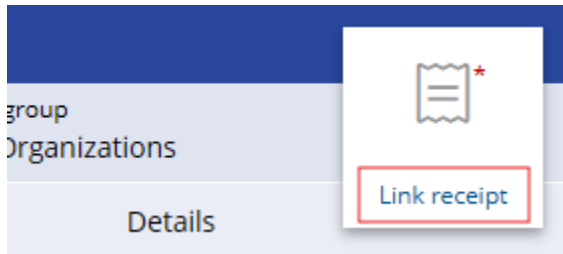
GL Code

- Code the transaction with the appropriate responses:
 - Is it Research or Study Abroad
 - Research
 - Study Abroad
 - NOT (meaning departmental index)
 - Index Number
 - For the personal portion, the index number must be 013116
 - GL Code
 - For the personal portion, the gl code must be 11660
 - Business Purpose – please be as specific as possible

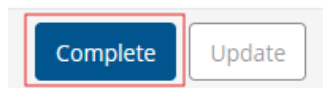
Business Purpose *

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



- Clicking Complete sends the transaction to your approver.