WellsOne® Expense Manager Mobile

Quick Reference Guide

The WellsOne Expense Manager mobile app helps you keep track of your expenses on the go. From receipt capture and coding, to approvals and reconciliation, the WellsOne Expense Manager app helps you to complete your expense tasks on the move.

Getting Started

The WellsOne Expense Manager app is available for both Apple and Android devices. Download the mobile application (app) by searching for WellsOne Expense Manager.

Note: This is a free app, but we recommend you download over Wi-Fi to avoid potential data charges.

To download:

1. Download the WellsOne Expense Manager app to your mobile device. The first time you sign on to the app, you will be asked to register your profile.
2. Sign on to the WellsOne Expense Manager website through CEO® and select your name in the upper-right corner.
3. Select **Mobile App**, then select **Get QR Code** to generate your unique account barcode.
4. Launch the WellsOne Expense Manager mobile app on your device, then select **Use QR Code** to scan the code generated on the website.
5. Create a PIN.

Manage Your Devices

You can sign on to the app on multiple supported devices. Each device is registered in the **User Settings** menu so you can manage what devices you want to grant access to.

To view and manage your devices from the WellsOne Expense Manager website:

1. Select your name in the upper-right corner
2. Select **Personal Settings**.
3. Select **Mobile Device**.

Expenses

Add receipts, search, and filter your expenses.

By default, a list of transactions that require your attention will display. You can code your transactions by selecting a transaction listed, then provide the required information. You will be prompted to complete all company-specific required information before completing a transaction.

Add Receipt

If a receipt is required and has not already been linked to the transactions, select **Add Receipt** on the expense details pane.

To use a previously-uploaded image, select **Receipt gallery**, then perform one of the following:

- For the applicable image, select the **Circle** icon in the upper-left part of the image, then select **Link.**
- To take a picture, select **Camera**, take the picture, then either select **Retry** or **OK**. From the **Unlinked** tab, select the **Circle** icon in the upper-left part of the image, then select **Link.**
- To use an image from the gallery on your phone, select **Your photos**, then choose the desired image. From the **Unlinked** tab, select the **Circle** icon in the upper-left part of the image, then select **Link.**

Edit Coding

Select **Edit** on the Expense Details pane to view the Coding screen. From this screen there are a few different ways to apply coding.

Searching for Codes

To search for codes:

1. Select a coding segment requiring action.
2. Select the **Search** icon to search for a code or select a favorite code.
3. To add a code to your favorites, search for a code and select the star to the right of the code.

Expense Templates

To use an Expense Template to code the transaction:

1. Select **Apply Expense Template** from the Coding screen.
2. Select the desired template to apply it.

Together we'll go far

Spend Wizards

To use a Spend Wizard to code the transaction:

1. Choose **Select Spend Wizard** from the Coding screen.
2. Select the **Star** icon of a Spend Wizard to mark it as a favorite. Favorites appear on the top of your list.
3. Select the Spend Wizard you would like to use to view allocations, enter details, and complete.
4. Select **Add Amount** to choose categories.
5. After the transaction is fully allocated, select **Apply**.
6. Complete any additional required fields, then select **Save**.

Receipts

To add a receipt to your Receipt Gallery:

1. Select the **Plus** sign, then select either the **Camera** or **Gallery** icon.
2. Use the camera icon to take a photo of your receipt or use the **Gallery** icon to upload a receipt image from your mobile device's gallery.

Link Receipts

WellsOne Expense Manager can automatically link your receipt images to expenses through Optical Character Recognition (OCR). However, if the receipt does not auto-link to an expense during the transaction review, you can manually select the unlinked image from your receipt gallery, then attach it.

Accounts

Select an account to view more details. On the **Transactions** tab, you can view your available credit, and a list of expenses by period. Select the **Search** icon in the upper-right corner to look for a specific transaction.

Approvals

From the main approvals screen, you can select specific employees or filter expenses. By default, you will see a list of transactions that require your attention. Select transactions to view details such as the business purpose, coding, and receipt images.

If you have any questions or require additional information, enter a comment, then select **Send** to return the item to the employee.

Select **Approve** to approve the expense.

Note: If you are a cardholder and an approver, you can set your default home page using Settings in the menu.