



# **WELLSONE EXPENSE MANAGER**

## **Access**





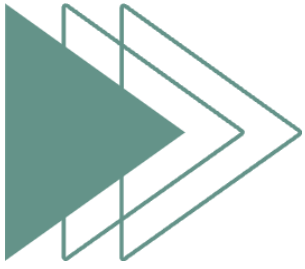
## WellsOne Sign On

To sign on to the online WellsOne Expense Manager, you must go through the Wells Fargo website.


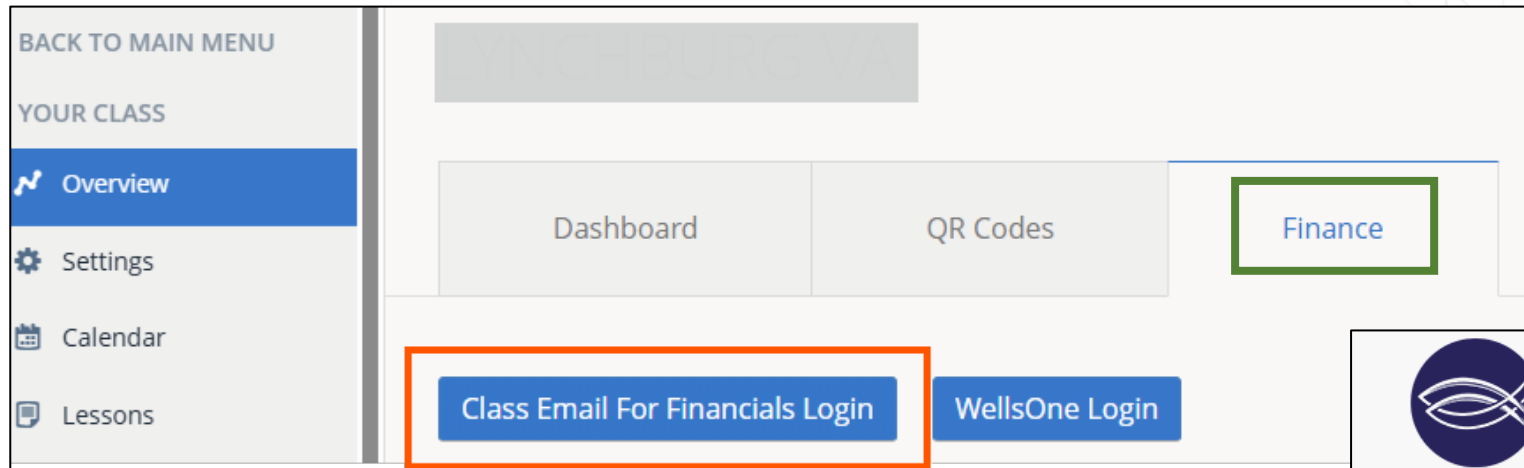
**The Wells Fargo/WellsOne Website is:**  
[wellsoffice.ceo.wellsfargo.com](https://wellsoffice.ceo.wellsfargo.com)

A computer (not a mobile device) is needed for the initial setup of the WellsOne Expense Manager.





## WellsOne Sign On for the First Time



**COMMUNITY  
BIBLE STUDY**

Email address:

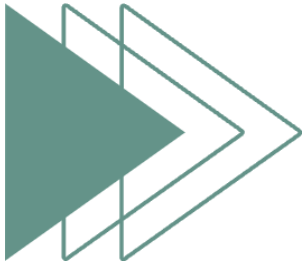
Password:

[sign in](#)

[www.Answers.communitybiblestudy.org](http://www.Answers.communitybiblestudy.org)

Fisher>Class Financial Email Login>How to Access Class Email for Financials





## WellsOne Sign On

To sign on to WellsOne enter the Company ID, User ID, and Password.

If the class is signing on for the first time, please review the WellsOne Access instructions in the Class Financial Procedures resource (CFP) in Chapter 4, Section C.

Sign On

All fields required optional.

Company ID

User ID

Password

☐ Remember me (optional)

Sign on

[Forgot password?](#)

[Sign on help](#)

**Company ID:** CBS921

**User ID:** Received in first Wells Fargo email

**Password:** Temporary password received in second Wells Fargo email

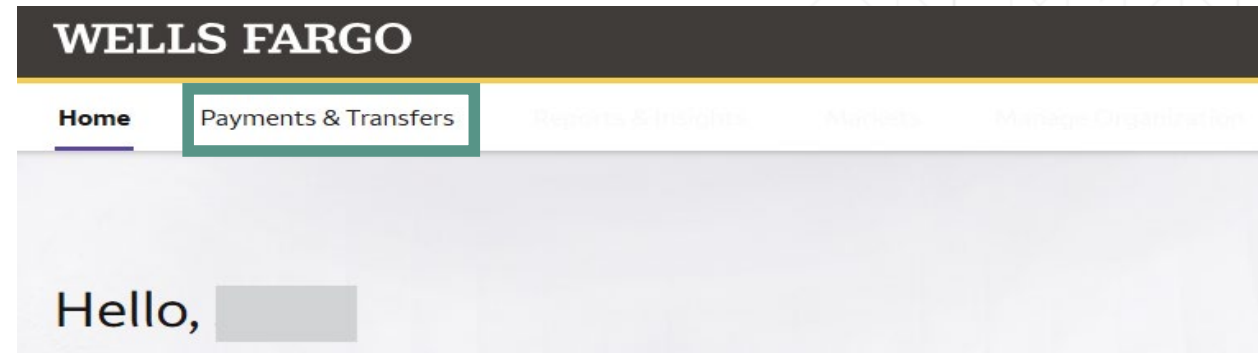
If unable to sign on, reset password. If you are still having issues, submit a ticket to Answers.



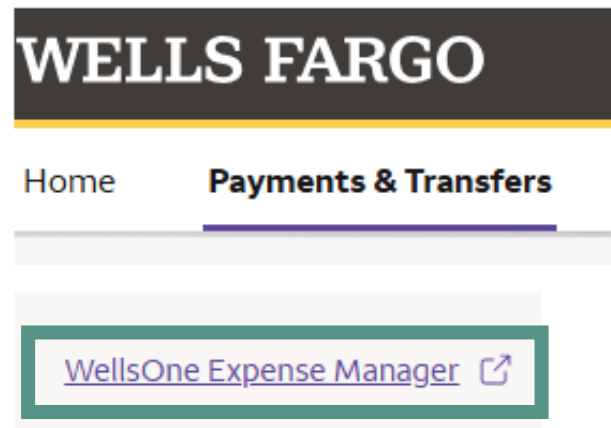


## How to Find WellsOne on the Wells Fargo Website

Click  
**Payments &  
Transfers**



Click  
**WellsOne  
Expense  
Manager**





# **WELLSONE EXPENSE MANAGER CARDHOLDER VIEW**

**Let's Take a Look.**





# WellsOne Training

## Cardholder View

### The Home Page Displays Balance and Available Credit

WELLS FARGO

HomeAccountsExpenses

Wf Cardholder 3

Card Expenses37

Pinned

To show your favorites here, click the pin icon on a menu item.

Account Services

Manage Text and Email Alerts

MY EXPENSES

Commercial | \*\*\*\* \* 9415

WellsOne Visa (3739) | Allison Cardholder1

Action Required	Pending Approval	Credit Limit (USD)	Current Balance (USD)
37	6	10,000.00	5,452.64

Available Credit (USD)  
4,547.36

Recent Periods

Authorizations and declines

Announcements

Important Note

We will never ask you to provide credit card details, password credentials, or any personal information in an email or over the phone. If you do receive a request like this please report it immediately to your Administrator.

Last visit: 10/13/2020

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# WellsOne Training

## Cardholder View

### There Are Several Types of Information Available in the User Dropdown Menu

WELLS FARGO

HomeAccountsExpenses

Personal Settings

The following diagram map is aimed to help you configure and manage your own personal settings. If you have any questions or wish to change settings not available here then please contact your system administrator.

Charge Groups

Charge Codes

Report Groups

Reports

Approval Roles

Approval Rules

Rate Groups

Personal Details

Account Management

Management Codes

Default Codes

Customize Views

Audit History

Regional Settings

Email Management

Mobile Devices

Personal Details

Wf Cardholder 2 Test - Personal Details

Employee ID

WFCardholder2

Company Unit

Central Sales

Phone Number

Email Address

WFCardholder@Wellsfargo.com

Date Added

06/22/2020

Date Modified

07/21/2020

Date Terminating

-

Receipt Upload via Email

5pb@test.receipt-upload.com

Manager Details

Wf Cardholder 2

Image Library

Language

Personal Settings

Help

Contact

Mobile App

Log Out

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Privacy

Security & Legal

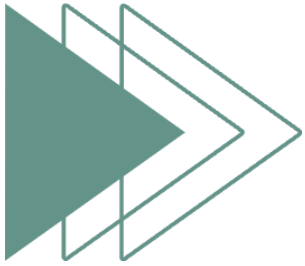
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# WellsOne Training

## Cardholder View

### Manage Text and Email Alerts

**WELLS FARGO**

HomeAccountsExpenses

Wf Cardholder 3

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# WellsOne Training

## Cardholder View

### Things to Know about Alerts:

You will receive an alert when:

- The account is getting close to the credit limit for the month
- Of any purchases over the minimum amount set to help track transactions on one or all purchasing cards
- A charge is declined
- To be notified of any suspicious activity on a card

**NOTE:** No texts will be sent to your mobile device until you opt in by adding your mobile number





# WellsOne Training

## Cardholder View

This Completes the WellsOne Access, Sign-On,  
and Cardholder View Training

