



WELLSONE EXPENSE MANAGER

RECEIPTS





WellsOne Training

Receipts


Uploading Receipts Directly to WellsOne

WellsOne® Expense Manager

Home Accounts **Expenses** Approvals

Expenses

Select all ☒ Code selected expenses

<input type="checkbox"/>		Amazon Mktpl	26.50 USD	>
		WF Visa 9739 (8815) 06/17/2025		

Usps Po 0569360111

Amount 2.10 USD	Date 04/25/2024	Issuer WellsOne Visa (9739)	Merchant category group Government Services
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Coding Details [Link receipt](#)

Spend Wizard Expense template

1

Amount incl 2.10 USD	GL Code	+ A required code is missing.
Tax N/A	Department	+ A required code is missing.
Tax amount 0.00 USD	Class	+ A required code is missing.
	Program	+ A required code is missing.
	Vendor ID	+ A required code is missing.
	Invoice Number	+ A required code is missing.
	Invoice Date	+ A required code is missing.

☒ Split ☐ Personal

Supplier Details
Purchase Usps Po 0569360111

Business Purpose





WellsOne Training

Receipts

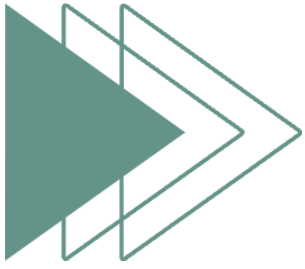
Uploading Receipts Directly to WellsOne

The screenshot displays the WellsOne interface for a purchase order (Usps Po 0569360111). The 'Coding' window is active, showing fields for Amount (2.10 USD), Date (04/25/2024), Issuer (WellsOne Visa (9739)), and Merchant category group (Government Services). A green circle highlights the 'Link receipt' button in the top right corner of the Coding window. A green arrow points from this button to the text 'To Access This Feature:'. Below this, a list of steps is provided:

- In the Coding Window, Click **Link receipt**
- Then Click **Image Library**

The second part of the screenshot shows the 'Image Library' dropdown menu, which is open, displaying the 'Image Library' option and a 'Receipt Submitted?' dropdown menu with 'N/A' selected. A green arrow points from the 'Image Library' option to the text 'Then Click Image Library'.





Uploading Receipts Directly to WellsOne

- When Image Linking window opens, click **Upload**. This will open the files stored on your computer.
- Choose the file you would like to attach and click **Open**.
- The receipt will be added to the Image Linking window and this links the receipt

The screenshot shows the 'Image Linking' window in WellsOne. At the top, it says 'WellsOne Visa (9739): 09/14/2023 Amount: \$1.26 USD'. Below this are two buttons: 'Upload' (highlighted with a green arrow) and 'Upload via Email'. To the right of these buttons are two tabs: 'Linked Images' and 'Image Library' (circled in orange). Below the buttons is a preview of a receipt from Walmart, labeled 'IMG_1122.jpeg'.

Overlaid on the right is a Windows File Explorer window titled 'Open'. The address bar shows 'Desktop > Bicknell expenses'. The left sidebar shows the 'Desktop' folder selected. The main pane displays a list of files:

Name	Status	Date modified	Type
Manpower 03.31.24 \$56.93	✓	4/8/2024 12:18 PM	Adobe Acrobat Document
Manpower 01.28.24 \$107.02	✓	4/5/2024 10:12 AM	Adobe Acrobat Document
Manpower 02.04.24 \$105.16	✓	4/5/2024 10:12 AM	Adobe Acrobat Document
Manpower 02.11.24 \$105.16	✓	4/5/2024 10:09 AM	Adobe Acrobat Document
Manpower 02.18.24 \$110.54	✓	4/5/2024 10:08 AM	Adobe Acrobat Document
Manpower 02.25.24 \$103.50	✓	4/5/2024 10:07 AM	Adobe Acrobat Document
Manpower 03.03.24 \$103.50	✓		
Manpower 03.10.24 \$107.02	✓		

A tooltip is visible over the second file, showing: 'Type: Adobe Acrobat Document', 'Size: 15.4 KB', 'Date modified: 4/5/2024 10:12 AM', and 'Availability status: Available on this device'.

At the bottom of the File Explorer window, the 'File name' field is empty, and the file type dropdown is set to 'Custom files' (highlighted with an orange box and a green arrow). 'Open' and 'Cancel' buttons are at the bottom right.





THIS COMPLETES THE VIDEO TRAINING ON
UPLOADING RECEIPTS DIRECTLY TO WELLSONE

Continue to the next video on:

Uploading Receipts by Email to WellsOne

