WELLSONE EXPENSE MANAGER

MOBILE APP

Mobile App Features

The WellsOne Expense Manager mobile app helps you keep track of your class expenses and complete coding associated with the transactions.

The app allows you to:

✓ Upload and manage receipts

✓ Add required information to transactions

✓ Split transactions

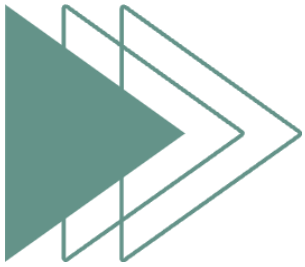NOTE: Before you can use the WellsOne Mobile App, you must set up your WellsOne account through a computer.

Setting Up the WellsOne Mobile App

Step 1: Download the WellsOne Mobile App

WellsOne Expense Manager [4+]
Wells Fargo
★★★☆☆ 3.2 • 35 Ratings
Free

- On your mobile device, go to the Apple or Goggle Play App store

- Choose the WellsOne Expense Manager App

- Download the WellsOne Expense Manager App

Setting Up the WellsOne Mobile App

Setting Up the WellsOne Mobile App

Step 2: Link the WellsOne Expense Manager Account to the Mobile App
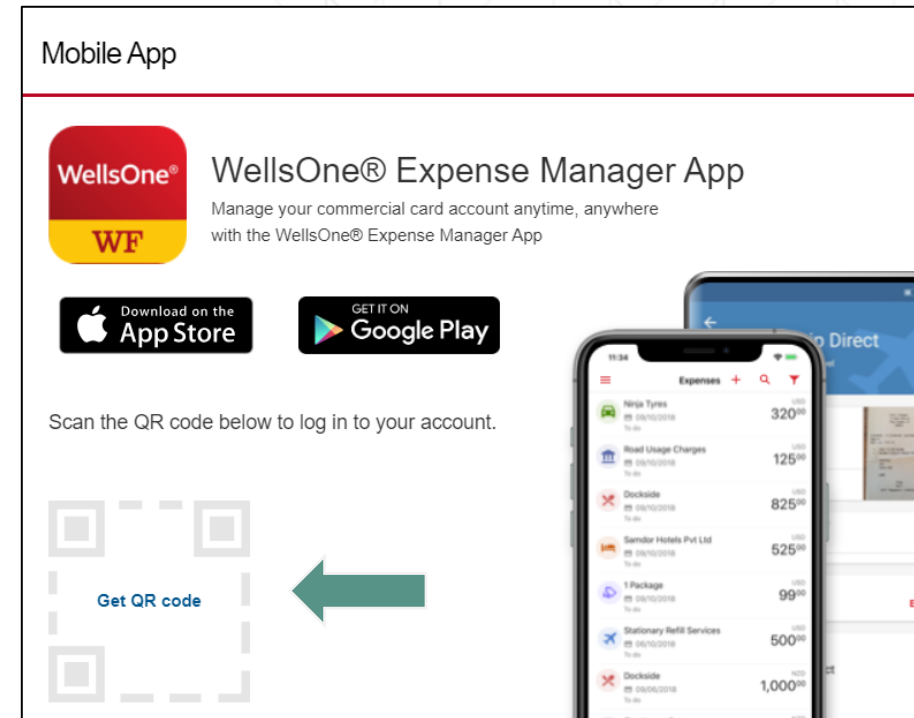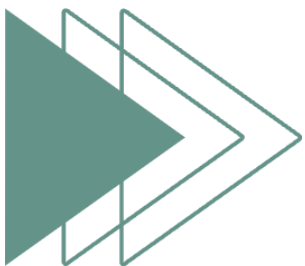
From your computer, sign on to WellsOne Expense Manager.

- Click the **person icon** in the upper right corner.

- Click **Mobile App.**

- Click **Get QR Code** this will be used to link the online account to the app.

- Using your mobile device's camera, scan QR code on the computer screen to link the account.

Mobile App

WellsOne® Expense Manager App
Manage your commercial card account anytime, anywhere with the WellsOne® Expense Manager App

Download on the App Store   GET IT ON Google Play

Scan the QR code below to log in to your account.

Get QR code

Cardholder View

From the Expenses screen, you can add receipts and search expenses.

By default, you will see a list of expenses that require your attention. Select an expense and complete any required information.

- Click **Edit** on the expense details pane to view the coding screen.

- From this screen, you can search for GL codes and enter the business purpose.

- Once complete, click **Save**.

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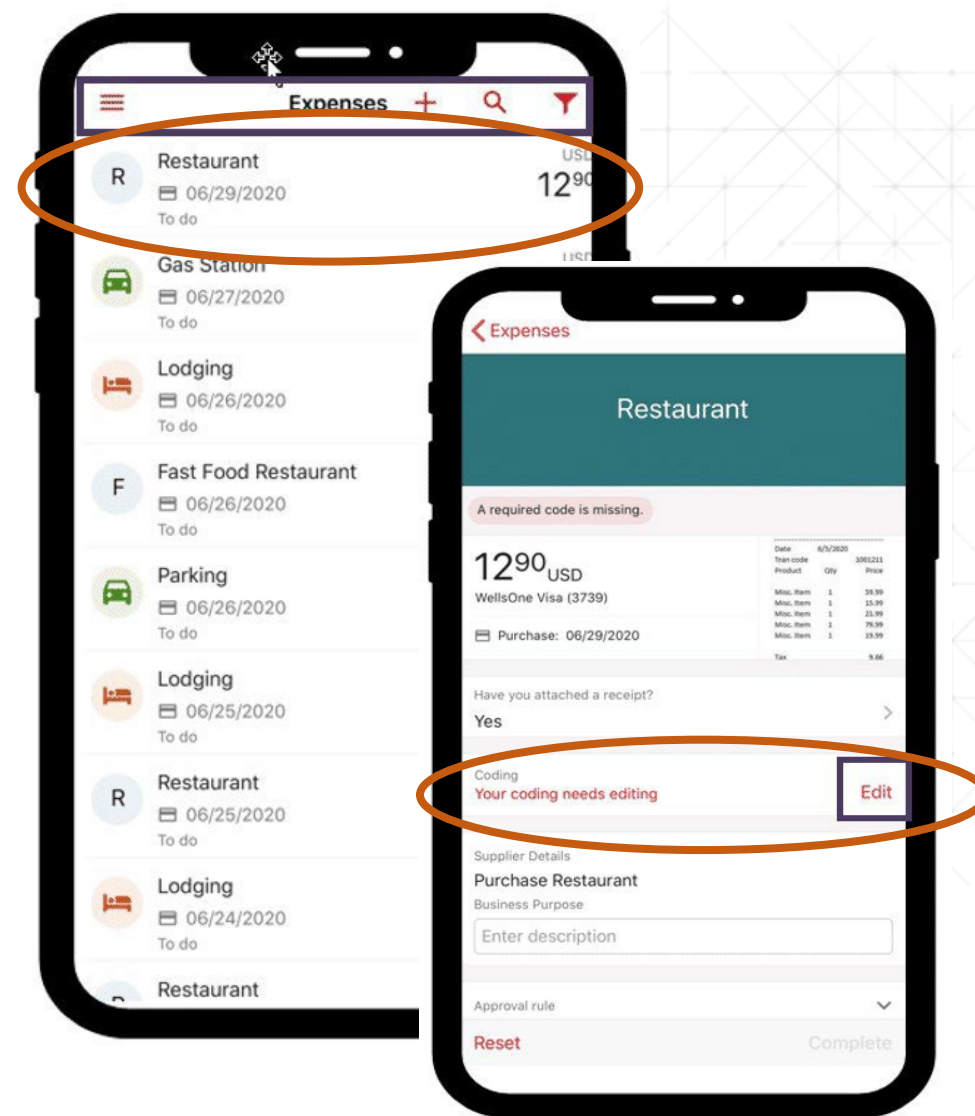
Split Transactions

The mobile app includes functionality that enables mobile users to split coding lines.

Mobile users will be able to:

- ✓ Split one coding line into multiple lines.

- ✓ Edit the new split line to select the correct charge codes, etc.
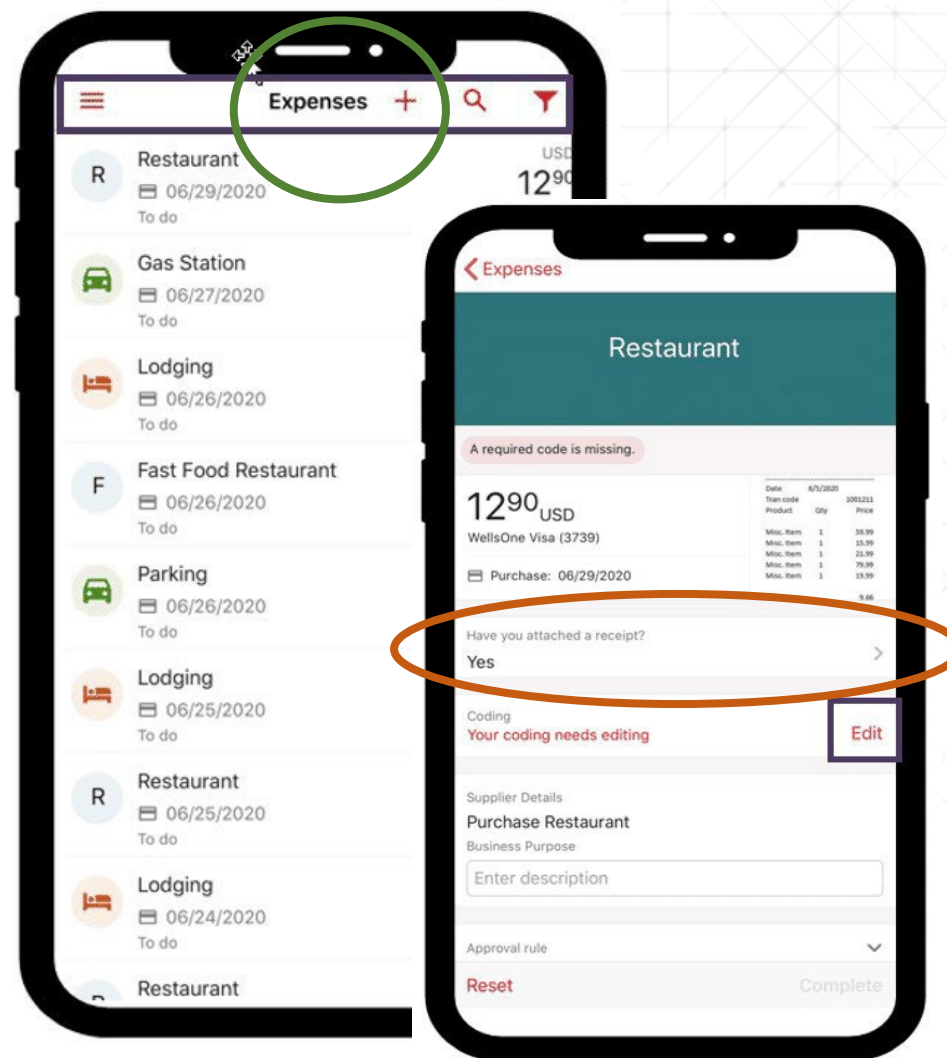
Cardholder View

To add a receipt for an expense that has not posted, click the **plus sign (+)**, then click the **camera** or **gallery** icon.

THIS COMPLETES THE VIDEO TRAINING ON THE WELLSONE MOBILE APP