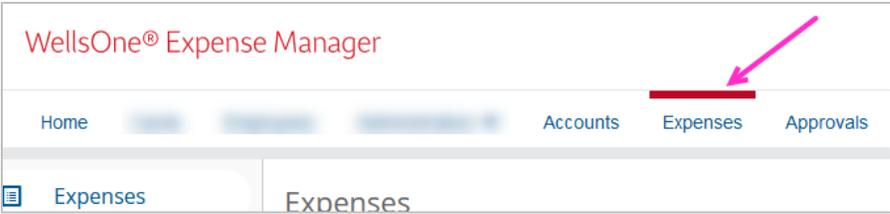
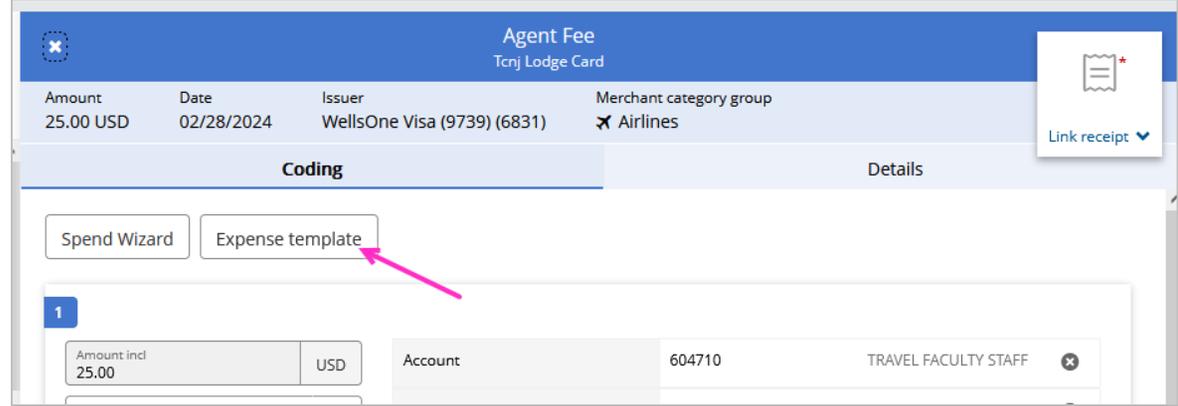
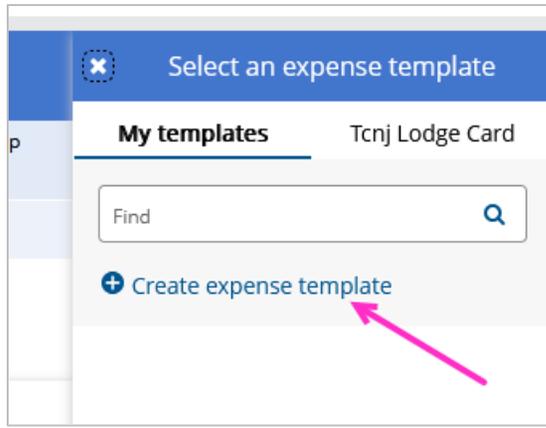


Process Name: Creating Expense Templates

| STEP | DETAIL |
|------|---|
| 1 | Sign in to Wells Fargo |
| 2 | <p>Choose Expenses</p>  |
| 3 | <p>Click the Expense Details arrow</p>  |
| 4 | <p>Click Expense Template</p>  |

5

Click **Create expense template**

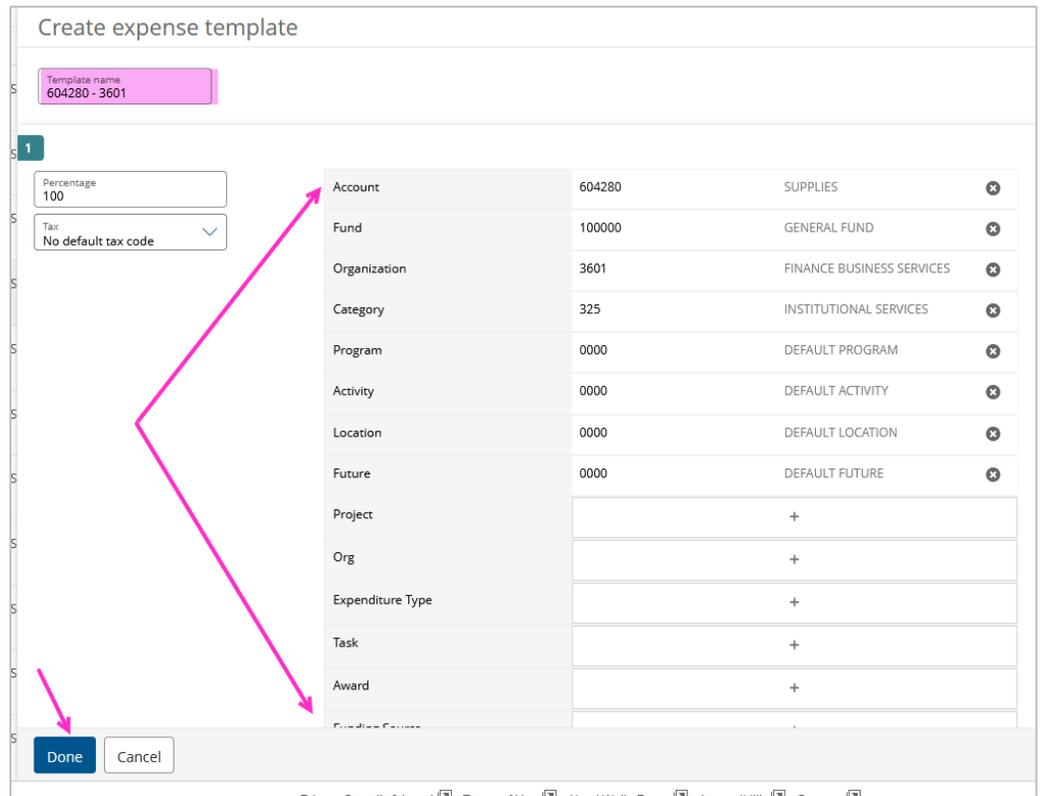


6

Create the Template

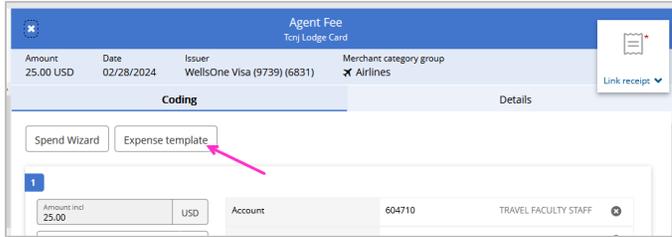
- Name the Template
- Provide Template COAs or POETAFs

Click **Done**



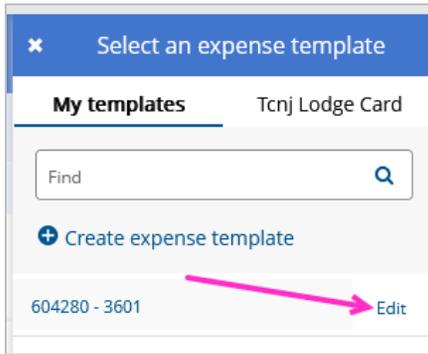
Editing a Template

Click **Expense Template**



1

Click **Edit**

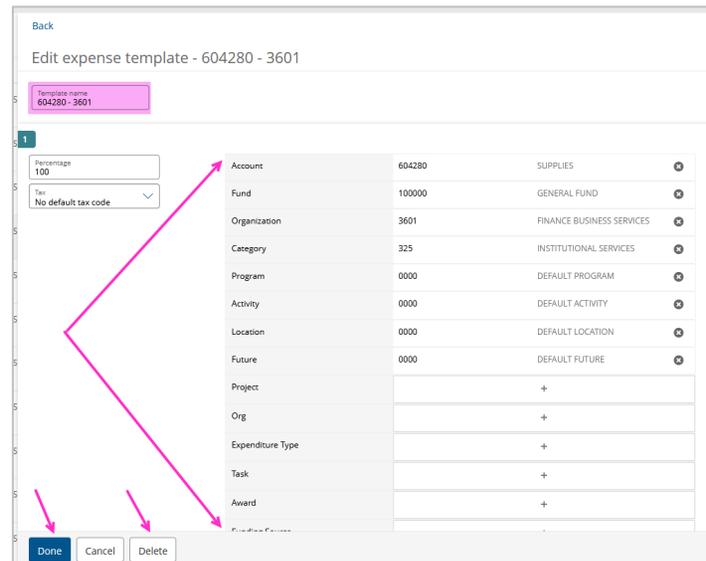


Change the name or Budget Values

Click **Done**

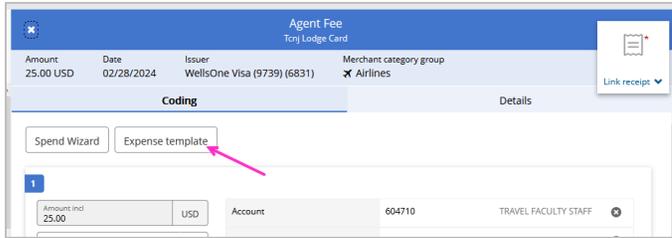
Note: you can delete a template from this screen.

2



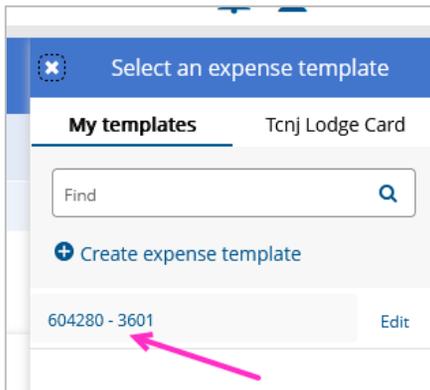
Using an Expense Template

Click **Expense Template**



1

Choose the template from the list



2

Add your receipt, Business Purpose

Click **Complete**

