WellsOne® Expense Manager

Cardholder, Delegate, and Approver Training for Purchase and Fleet Cards

Treasury Department

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Getting Started

After receiving your card, complete the following steps:

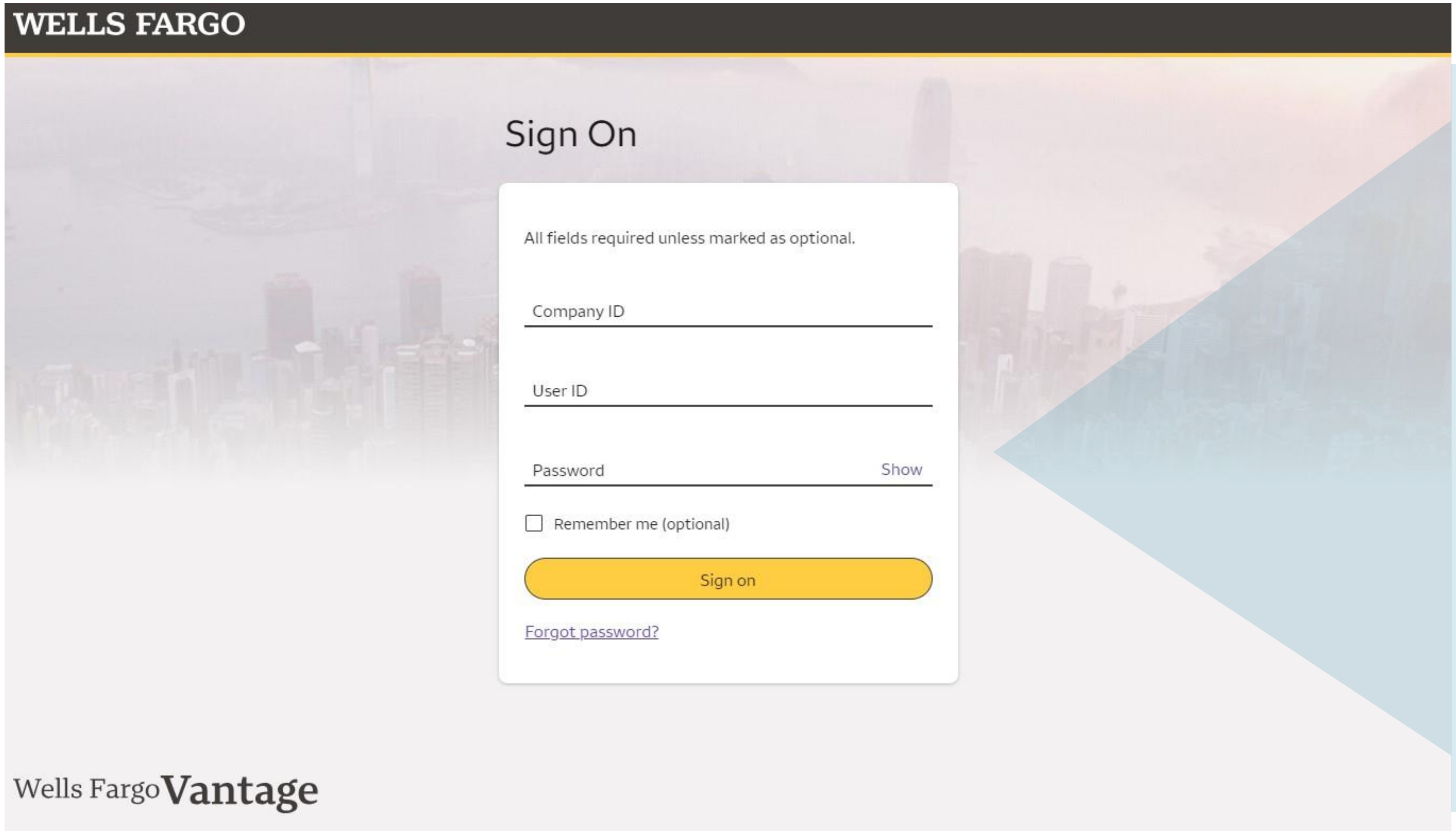
- Activate your card by calling the toll-free number located on the activation sticker
- During activation, you will be prompted to enter a Unique ID, also referred to as an Activation ID
  - For purchase cards, this is the last 4 digits of the cardholder SSN (TFN– Australia, SIN – Canada)
  - For fleet cards, this is the last 4 digits of the VIN
- You will then be asked to create a customized Personal Identification Number or PIN
- Be sure to sign the back of your card
- Record the WellsOne Service Center number located on the back of your card in your mobile device or address book for easy reference.
  - U.S. and Canada: (800) 932-0036; Australia: (612) 332-2224
- Log into WellsOne Expense Manager

Expense Review Deadlines

- Notifications will be sent from Wells Fargo as transactions become available for review; notification frequency is customizable with a minimum requirement of weekly notifications
- Weekly expense review is required
- **Cardholder transactions** settled by Friday must be reviewed by end of day the following Tuesday of each week*
- **Approver transactions** settled by Friday must be reviewed by end of day the following Wednesday of each week
- If unable to complete transaction review due to vacation or no system access, expenses must be delegated to another team member for review

**Your manager may set an earlier expense review deadline*

Signing In



Visit: https://wellsoffice.ceo.wellsfargo.com

To sign into the portal, you'll need:

- Company ID
- User ID
- Password

Enter your login credentials, then select the **Sign On** button.

Note: New users will receive two separate emails with your credentials – one with the Company ID and User ID, and another with your password.

Automatic Access

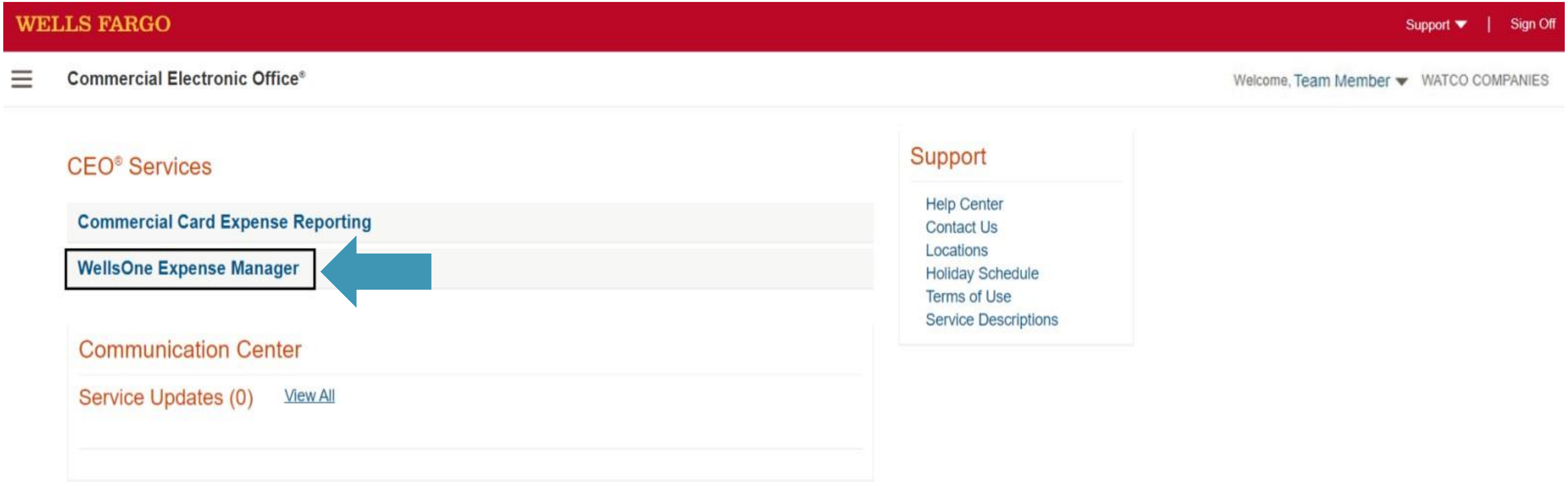
If WellsOne Expense Manager is the only service that you will access, you can choose to automatically display it each time you sign on.

Select your username in the upper right corner.

Then select **User Profile** from the drop-down menu.

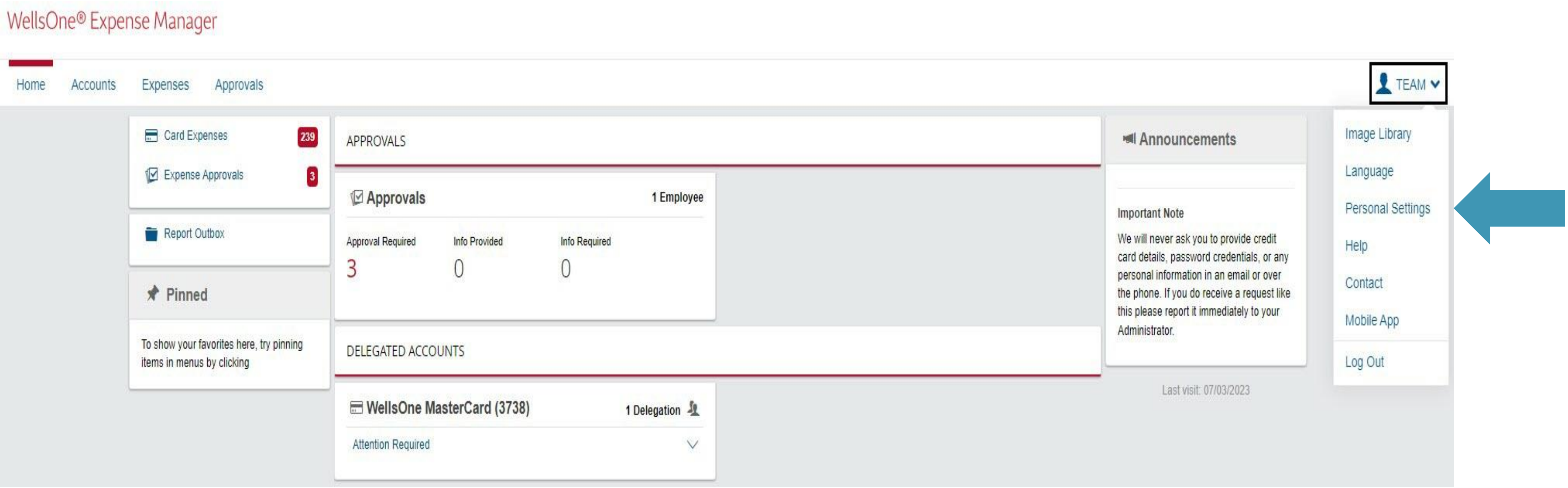
On the following page, select **Edit** under Preferences to turn on the Automatic Access setting. Select **Save.**

Navigation Menu



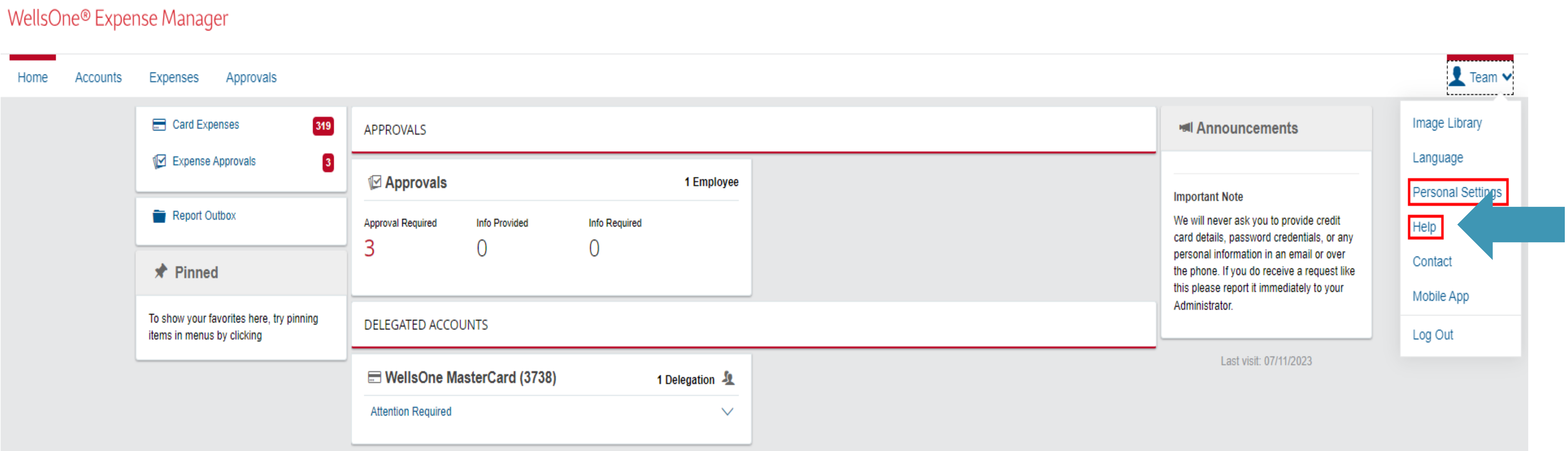
On the left, select **WellsOne Expense Manager**

Home Screen



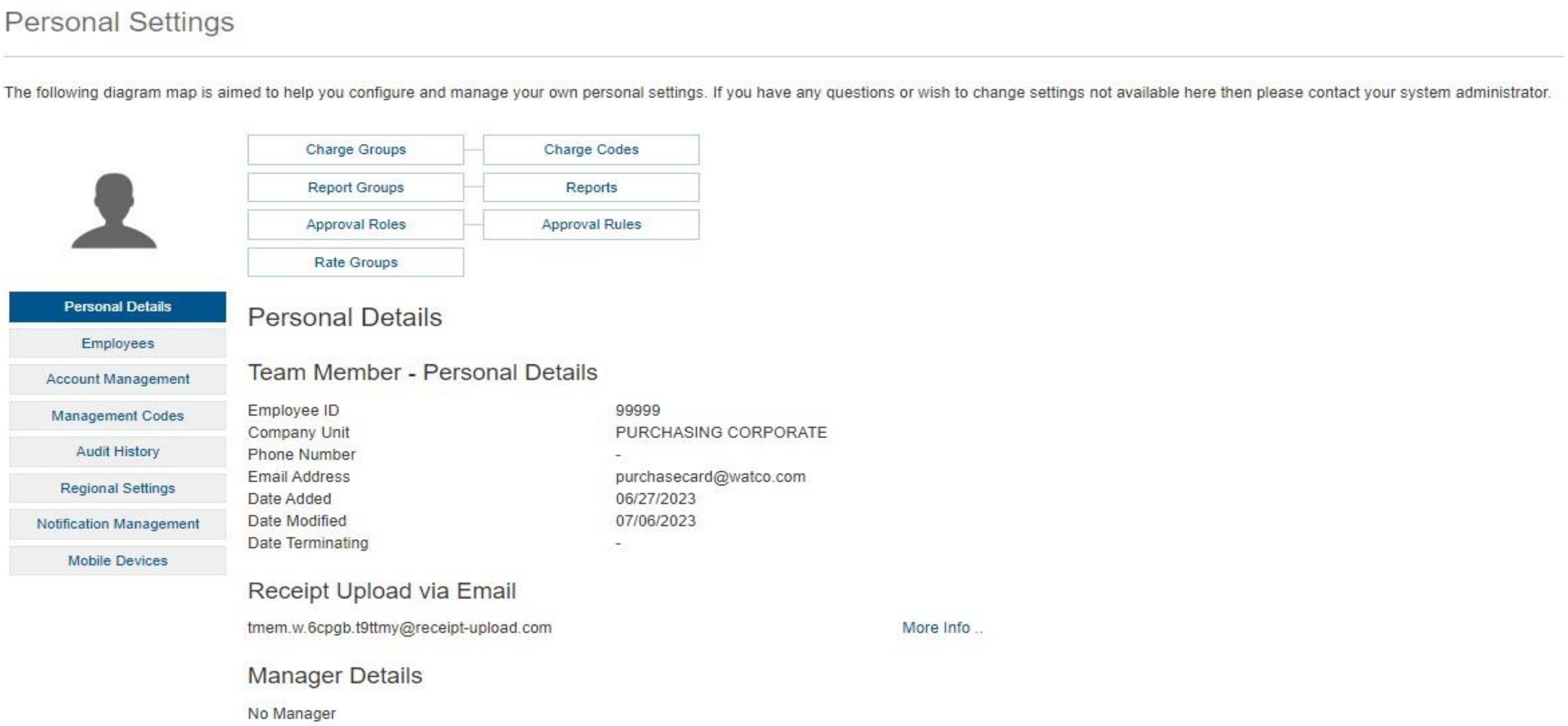
To access your Personal Settings, select your name in the top right corner and choose **Personal Settings** from the dropdown menu

Personal Settings – Help Section



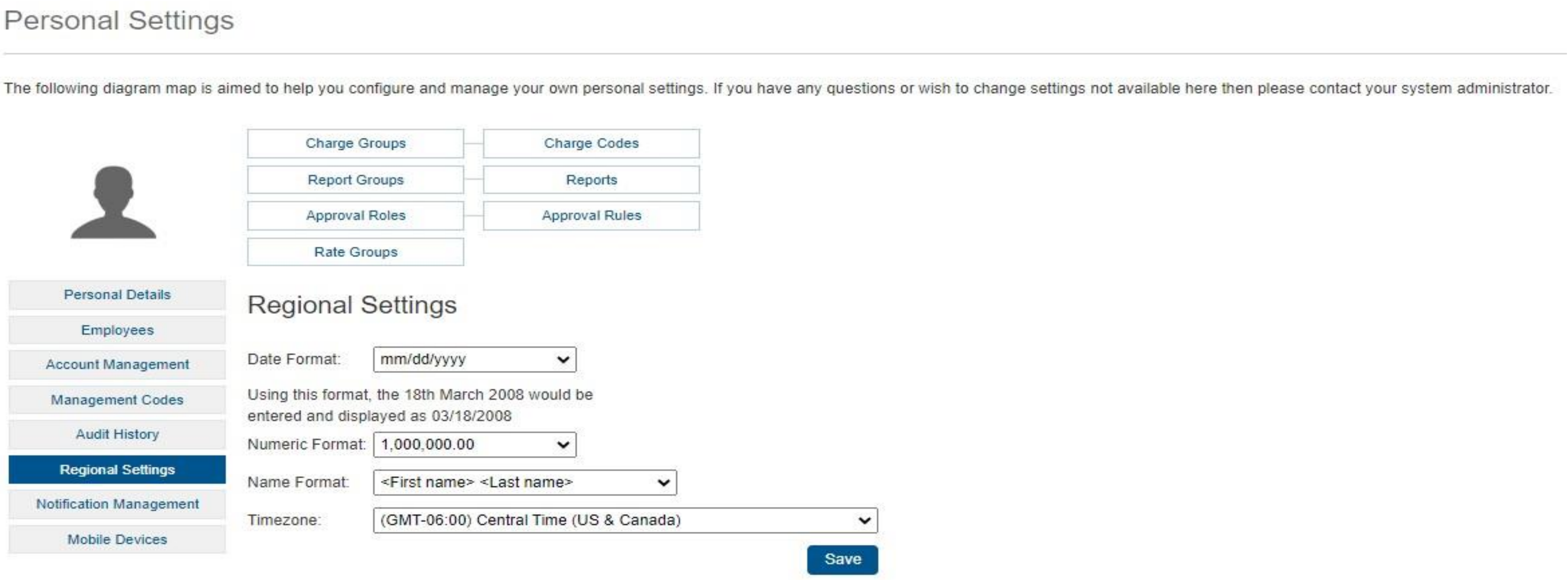
The dropdown user menu also has a **Help** section available for all users and is accessible throughout the WellsOne Expense Manager system

Personal Settings – Personal Details



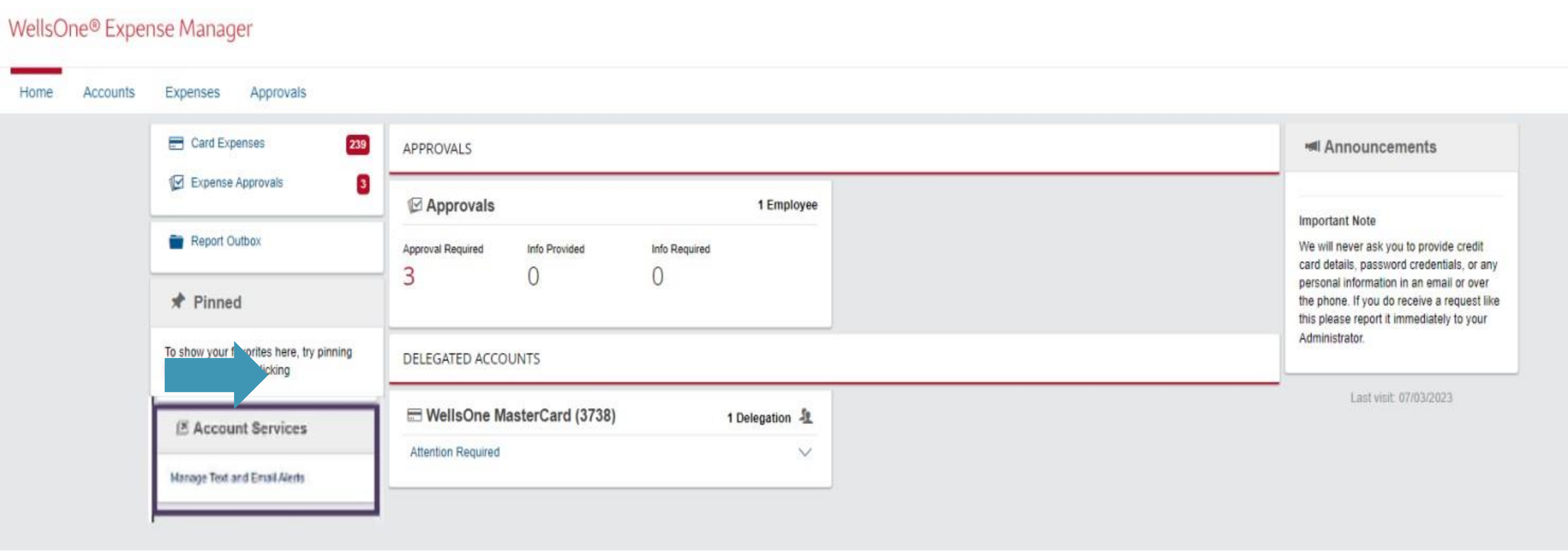
Under **Personal Details** you will see basic profile information including your employee ID, company unit, and email address, as well as your unique receipt upload email address and manager details

Personal Settings – Regional Settings



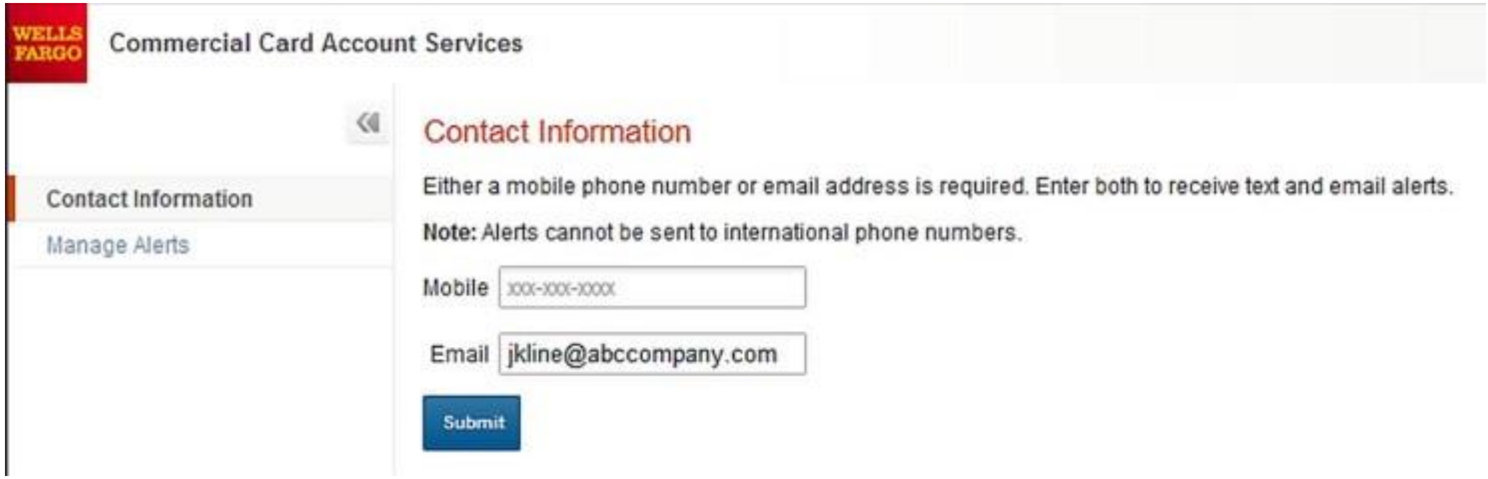
Under **Regional Settings** you can customize your preferred date format, numeric format, name format, and time zone

Manage Text and Email Alerts



To manage your text and email alerts, select **Manage Text and Email Alerts** under **Account Services.** Commercial Card Account Services (CCAS) will open in a new browser window.

Commercial Card Account Services



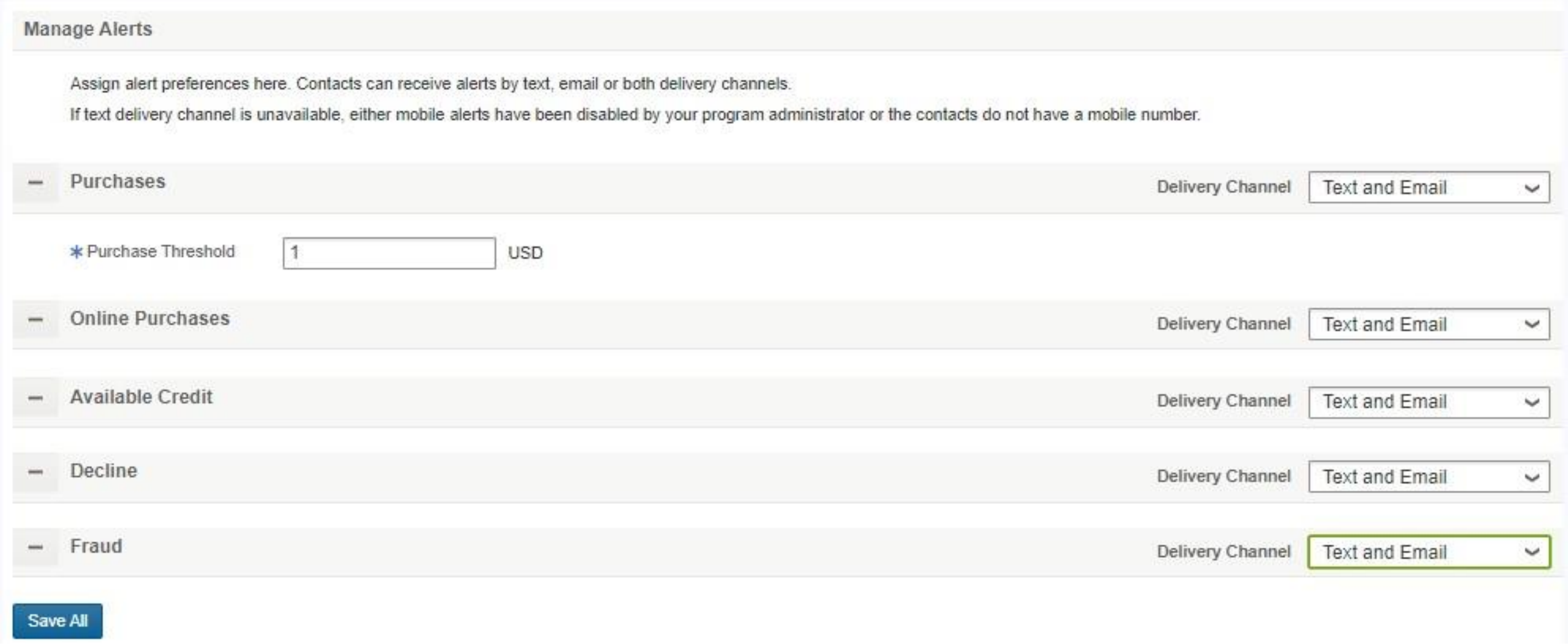
On the CCAS page, select **Contact Information** on the left menu

Your mobile phone number and email address may already be populated; verify your information and modify if necessary

Note: Alerts can't be sent to international phone numbers

Select **Submit** when finished

Commercial Card Account Services



Next, select on **Manage Alerts** in the left-hand menu

This screen will allow you to manage the alert types activated by your company/program

For each alert, you may choose “None”, “Text”, “Email”, or “Text and Email”

Select **Save All** when finished

Commercial Card Account Services

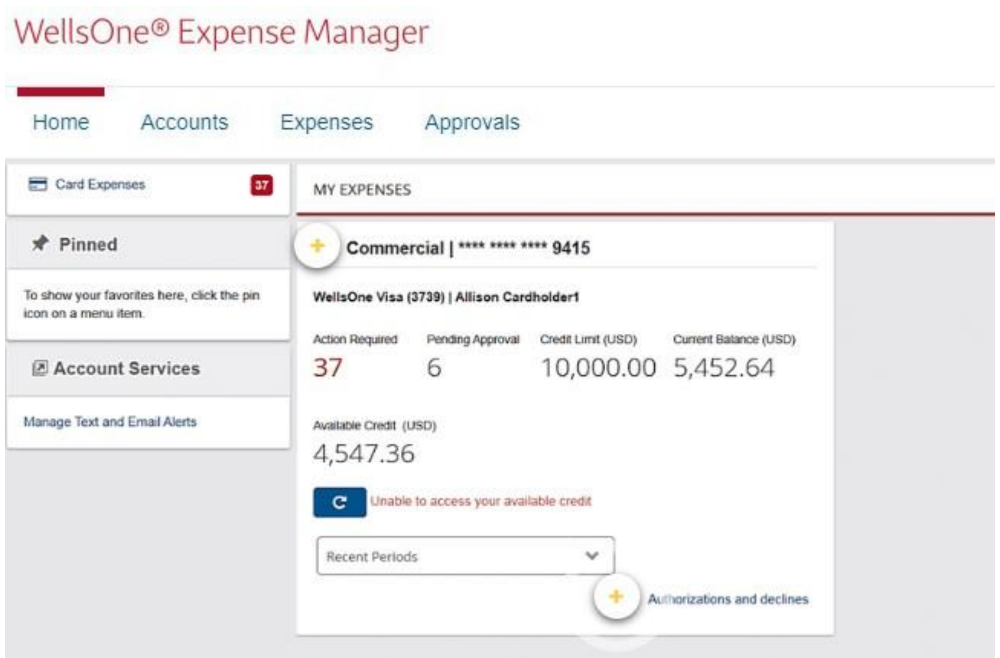
- Fraud alerts are automatically sent to all cardholders by email, and it is recommended to also receive fraud alerts by "Text and Email".
- Note: All cardholders with Watco-provided cell phones are required to receive fraud alerts by text and email
- Up to 10 contacts can receive alerts for a single card
- A $1 purchase threshold is required for general purchase alerts. Alerts are sent when this threshold is exceeded.
- Dollar thresholds are not available for online purchases. Alerts issued include all online authorizations, declines, credits, and reversals.
- To receive your monthly credit balance, text the word "Avail" to 93236; the amount available will be sent via text, email or both depending on which delivery option is selected

Commercial Card Account Services

- Decline alerts are issued when a purchase is declined for any reason on your card
- A Fraud alert requires an immediate response from the cardholder to initiate action by our Fraud Alerts system. Purchases out of the normal spending pattern and footprint raise these alerts.
- During first-time enrollment, if any alert types are set to the delivery channel of “Text” or “Text and Email,” you will receive an opt-in message on your mobile device and you must opt in for the service by texting “YES” or “START” as a reply. **Note:** If you have previously opted out for alerts, you must text OPT IN to 93236 to restart.
- No texts will be sent to your mobile number until you opt in
- Email alerts do not have an opt-in process, so they will begin immediately

Cardholder View

Your home page provides a summary of details for your card and expenses



My Expenses gives a quick summary of your current expenses

Here you will see the number of transactions with **Action Required**, and the number **Pending Approval**

You will also see your **Credit Limit**, **Current Balance**, and **Available Credit**

Note: If you have multiple cards, you will see each of them listed here

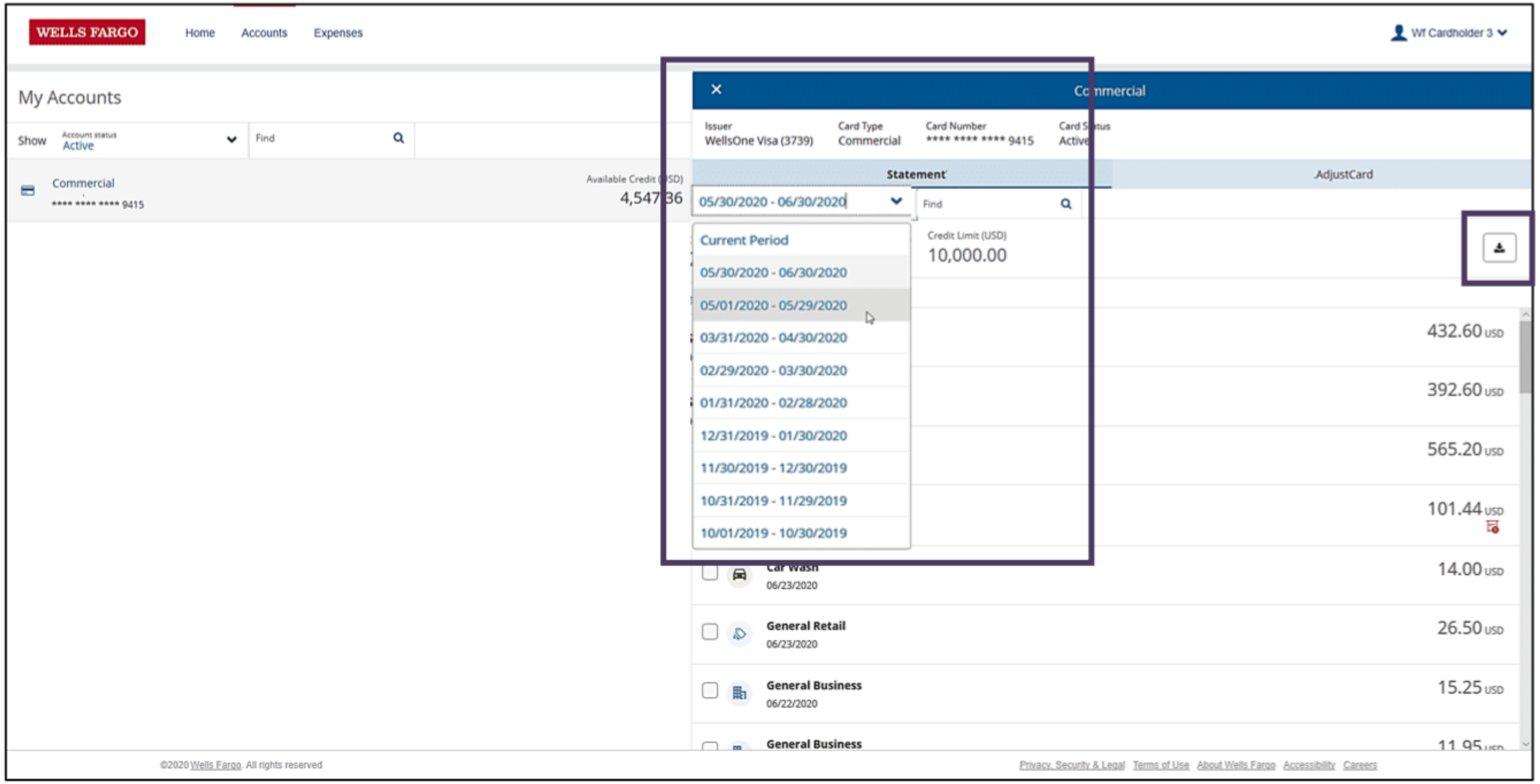
The home page also allows you to view recent **Authorizations** and **Declines**

At the far right, you will see an **Announcements** box. Any important notes regarding the system will be posted here.

Accounts Screen

On the **Accounts** screen, choose the account to want to look at, and then select **Statements**

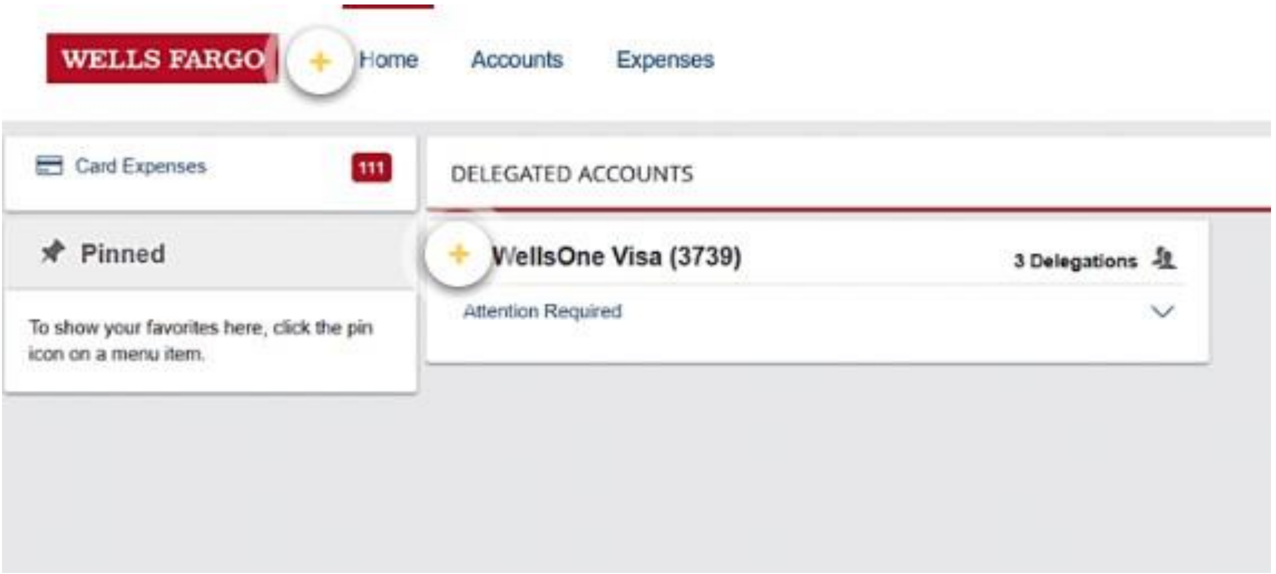
You can choose a statement period or search for a particular transaction. At the far right, you can also select the download icon to save a PDF of your statement to your computer for offline viewing.



Delegate View

If you are responsible for a card, reconciling expenses for another team member, or there is another reason a team member is unable to take action on their expenses, you may be selected as a delegate

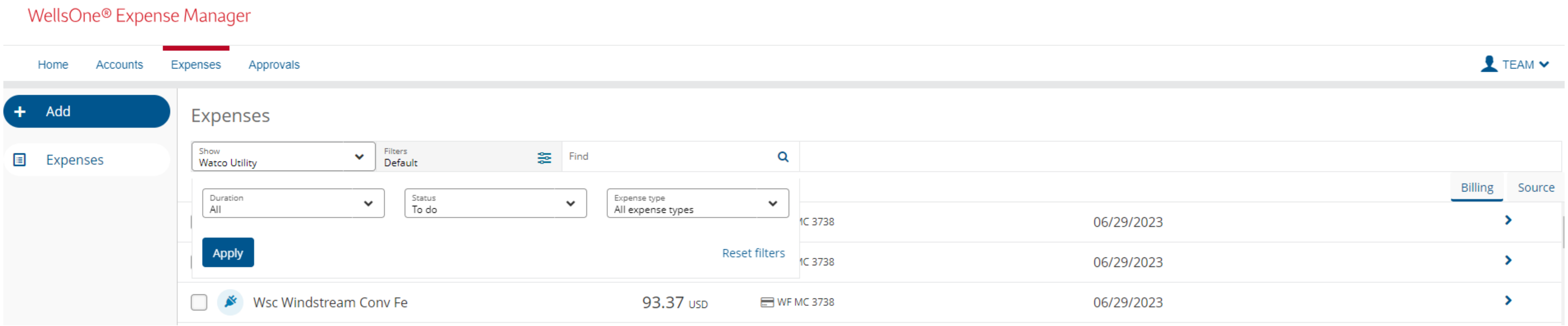
As a delegate, your home page will include a summary of the accounts delegated to you



The **Accounts** screen allows you to see additional details about accounts delegated to you, including available credit

The **Delegated Accounts** section gives you a quick summary of the current items that require attention. Select **Action Required** to be taken to the **Expenses** tab.

Reconciling Transactions



You will see a list of transactions that require your attention when you select **Expenses** in the top menu

You can apply various filters to the transaction list to adjust the duration, status, and expense type

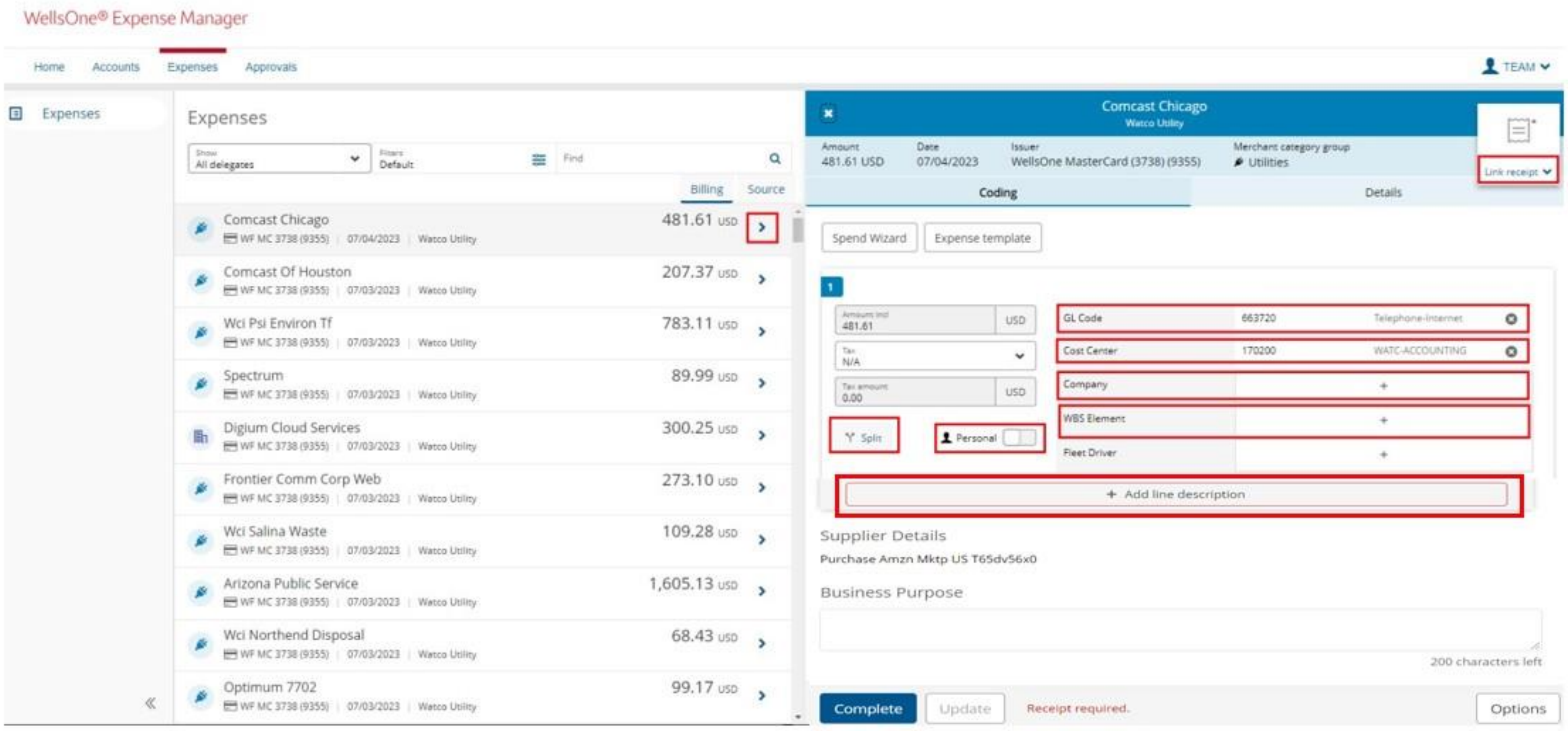
You may also receive periodic system-generated emails with a list of transactions requiring action

Coding Transactions

- There are multiple ways to code transactions:
  - Standard Coding
    - Allows cardholder or delegate to add necessary details to each expense
  - Quick Coding
    - You can apply the same coding to multiple card expenses from your To Do list rather than coding each individually
    - If you are a delegate, you must select a card before applying Quick Coding; you may only Quick Code one account at a time
    - You may multi-select a maximum of 50 card expenses
  - Expense Templates
    - Unique to each team member
    - Allow quick completion of common transactions by saving specific coding, business purposes, or allocations as templates
  - Spend Wizards
    - Spend Wizard may be required for some card transactions
    - Enables you to view and provide detailed information about the expense

Standard Coding

Standard coding allows you to add the necessary details to each expense



Standard Coding

For each field dropdown menu, select **Search**

Optionally, enter the Code Value or Description you want to search for and select **Search**

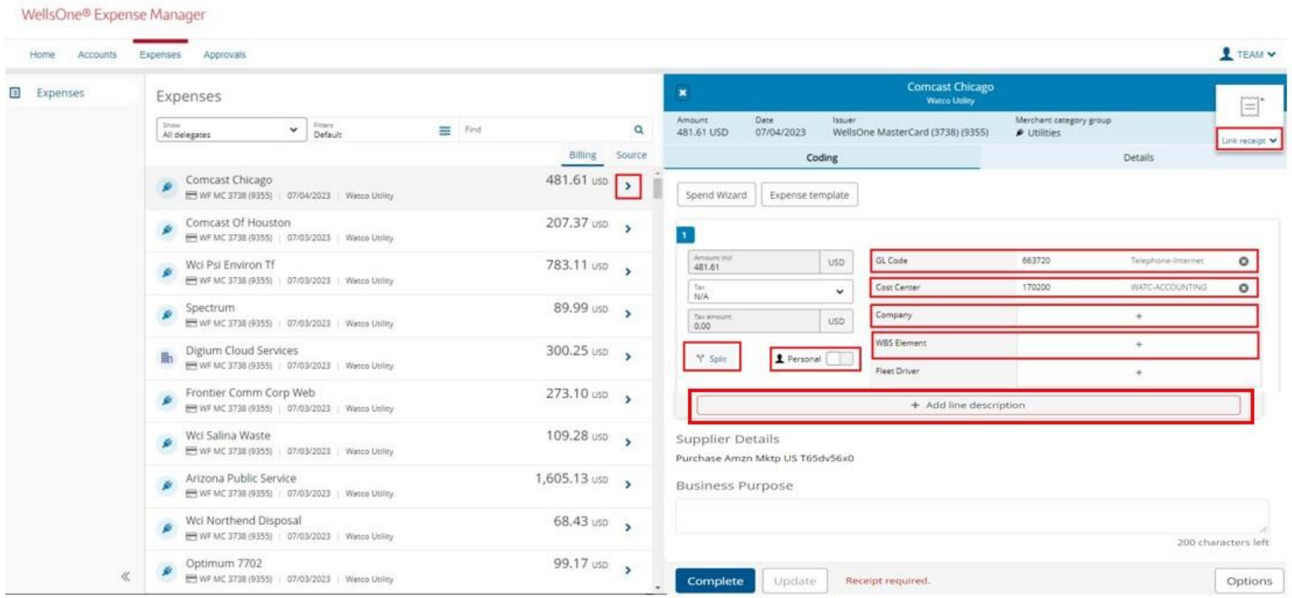
Please note:
Use the wildcard character (%) anywhere in the search string to filter codes to display. For example, ABC%51 will return codes that start with ABC and contain the number 51 (ABC005100).

Select the arrow to use the code for the transaction. Select the star to add the code to favorites or to unfavorite a code.

The Tax and Tax Amount fields are not editable.

Quick Coding

With Quick Coding, you can apply the same coding to multiple card expenses from your To Do list rather than coding each expense individually

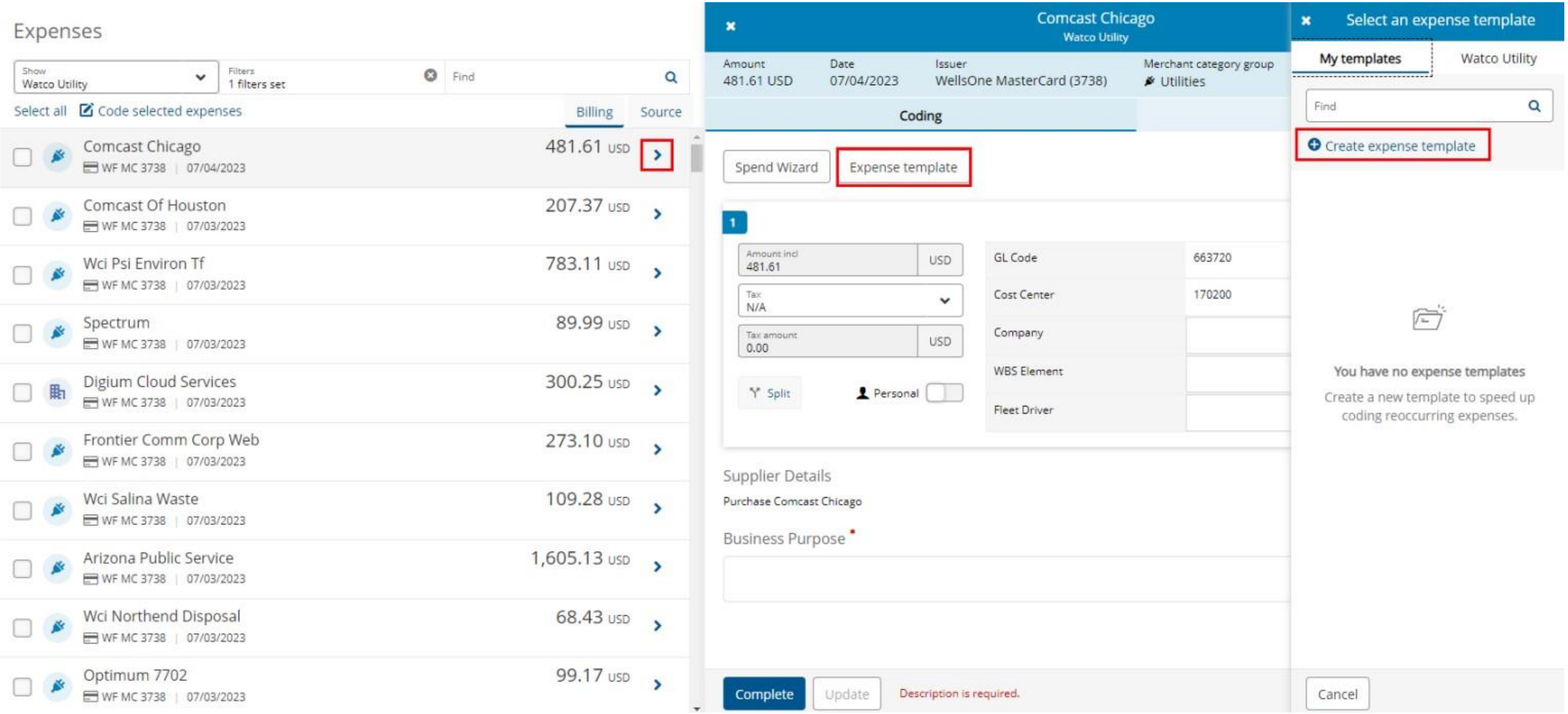


- Check the boxes next to each expense you would like to code together (you may multi-select up to 50 expenses from only one account at a time).
- Select **Code selected expenses** under the filter
- Once transactions have been selected, complete all required fields and select **Complete**

Please note: Detailed receipts/invoices must also be uploaded to each transaction after coding is complete

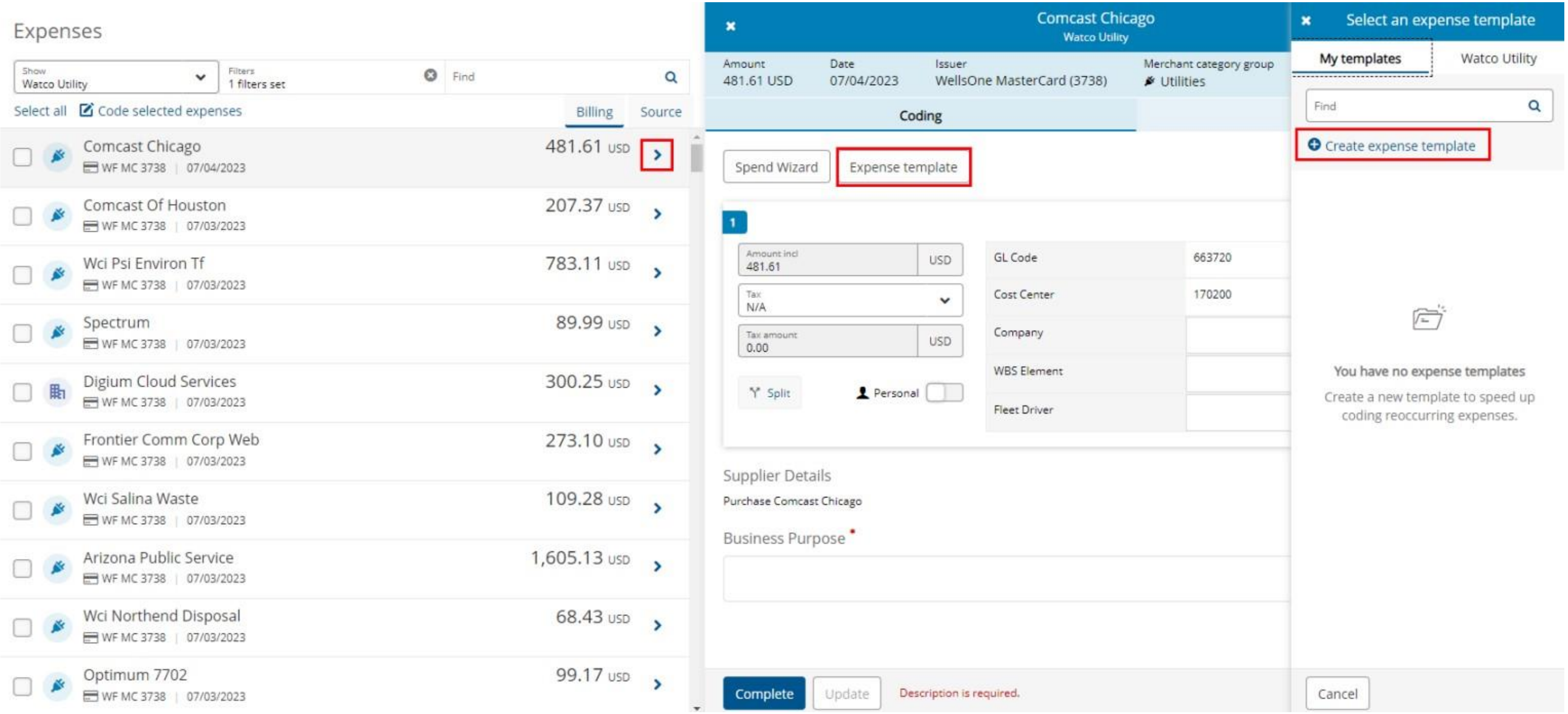
Expense Templates

Expense Templates are unique to each cardholder. They allow you to quickly complete common transactions by saving specific coding, business purposes, or allocations as templates.



Expense Templates

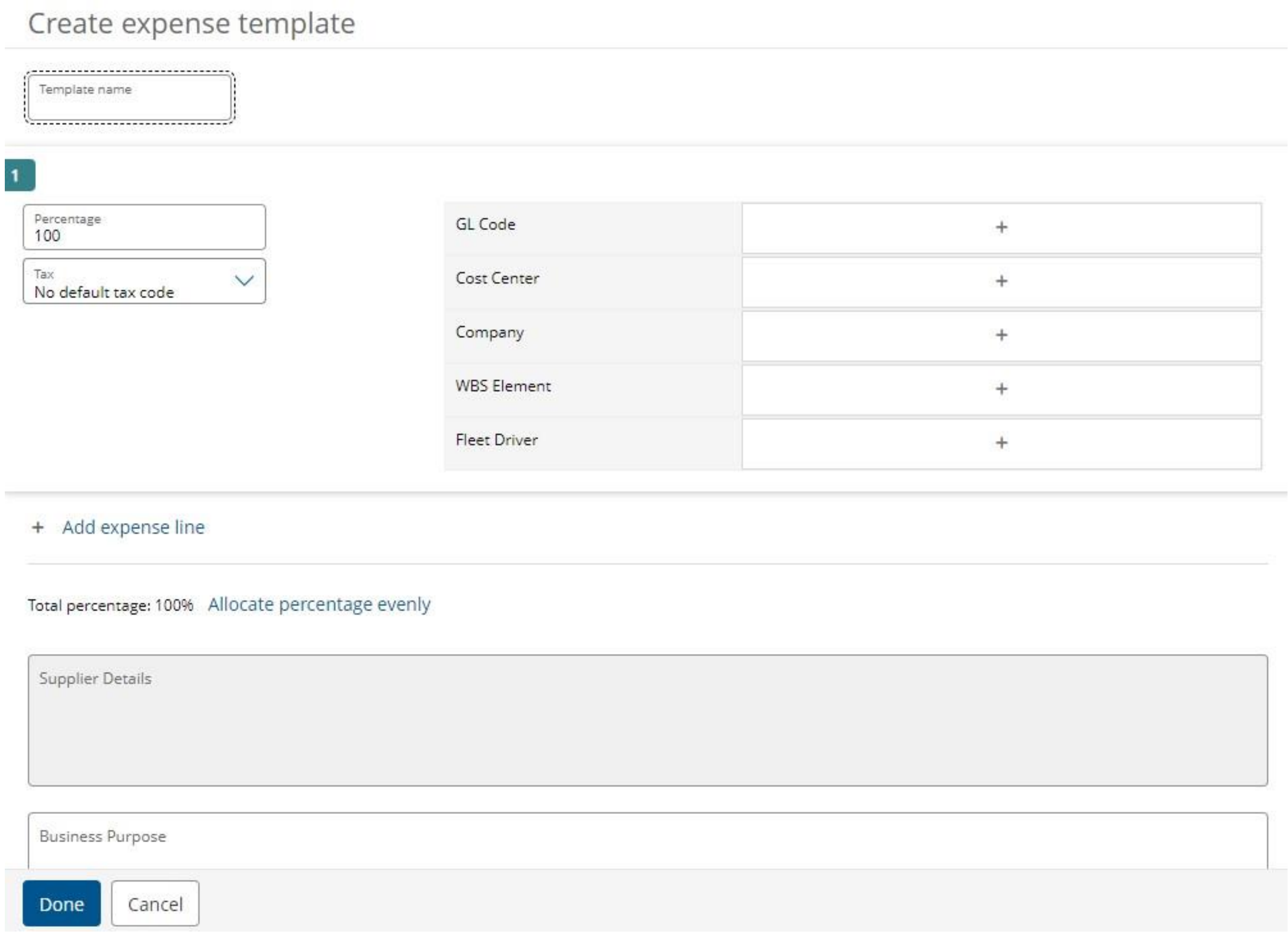
To create a template during the coding process, start by selecting the transaction to be coded from the Expense list. Then select **Expense Templates** and select **Create Expense Template**.



Expense Templates

The **Create Expense Template** screen will display:

- Enter a template name and complete all fields you want as default fields
- Select **Done**
- Once an Expense Template has been saved, it can be applied to any transaction or group of transactions



Expense Template

To use an existing template during the coding process, select an individual transaction or group of transactions from the Expense List

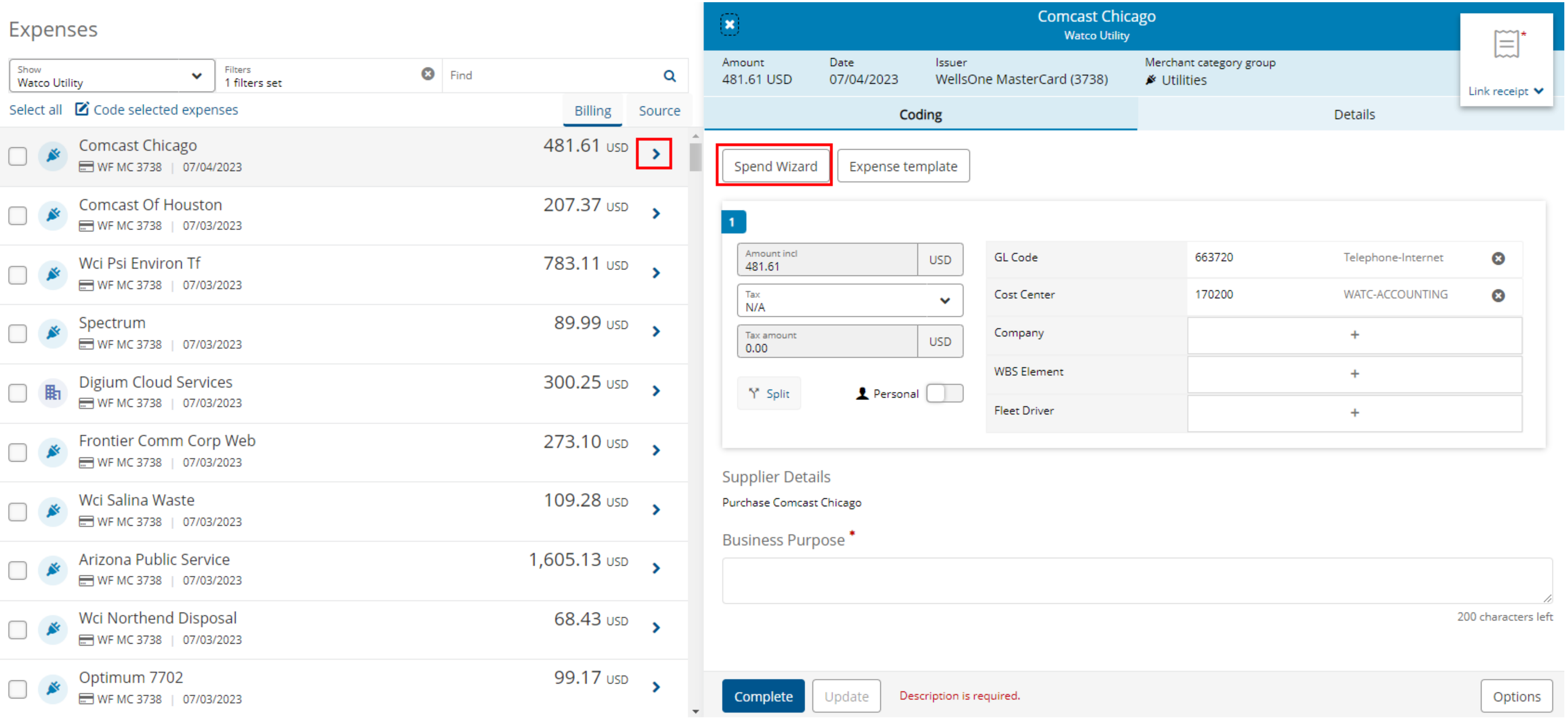
Select **Expense Templates** and choose the template you want to use

Once the defaults from the template have been applied to the transaction, complete any remaining required details and select **Complete**

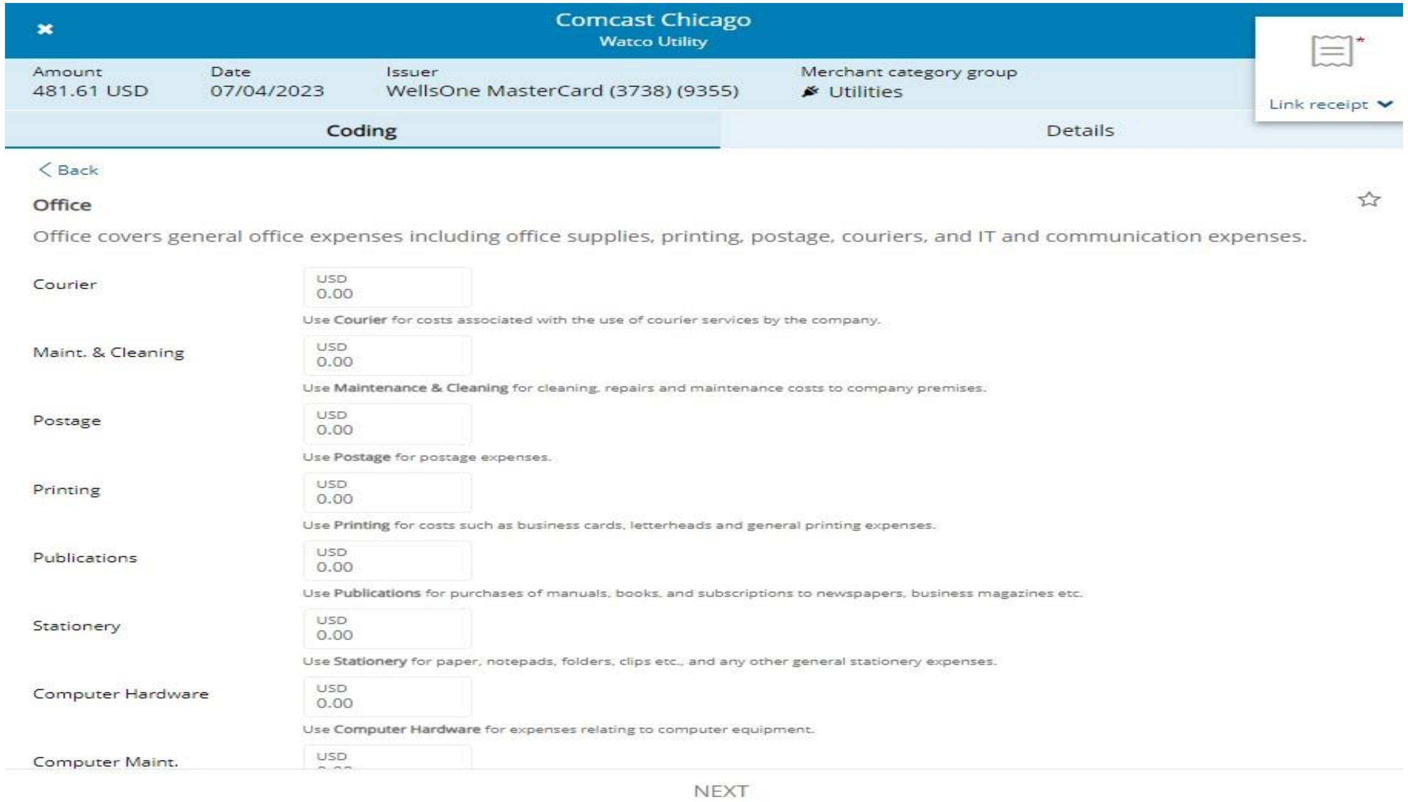
Please note: Detailed receipts/invoices must also be uploaded to each transaction after coding is complete

Spend Wizard

Watco may require you to complete a Spend Wizard for all or some of your card transactions. The Spend Wizard enables you to view and provide information about the expense.



Spend Wizard

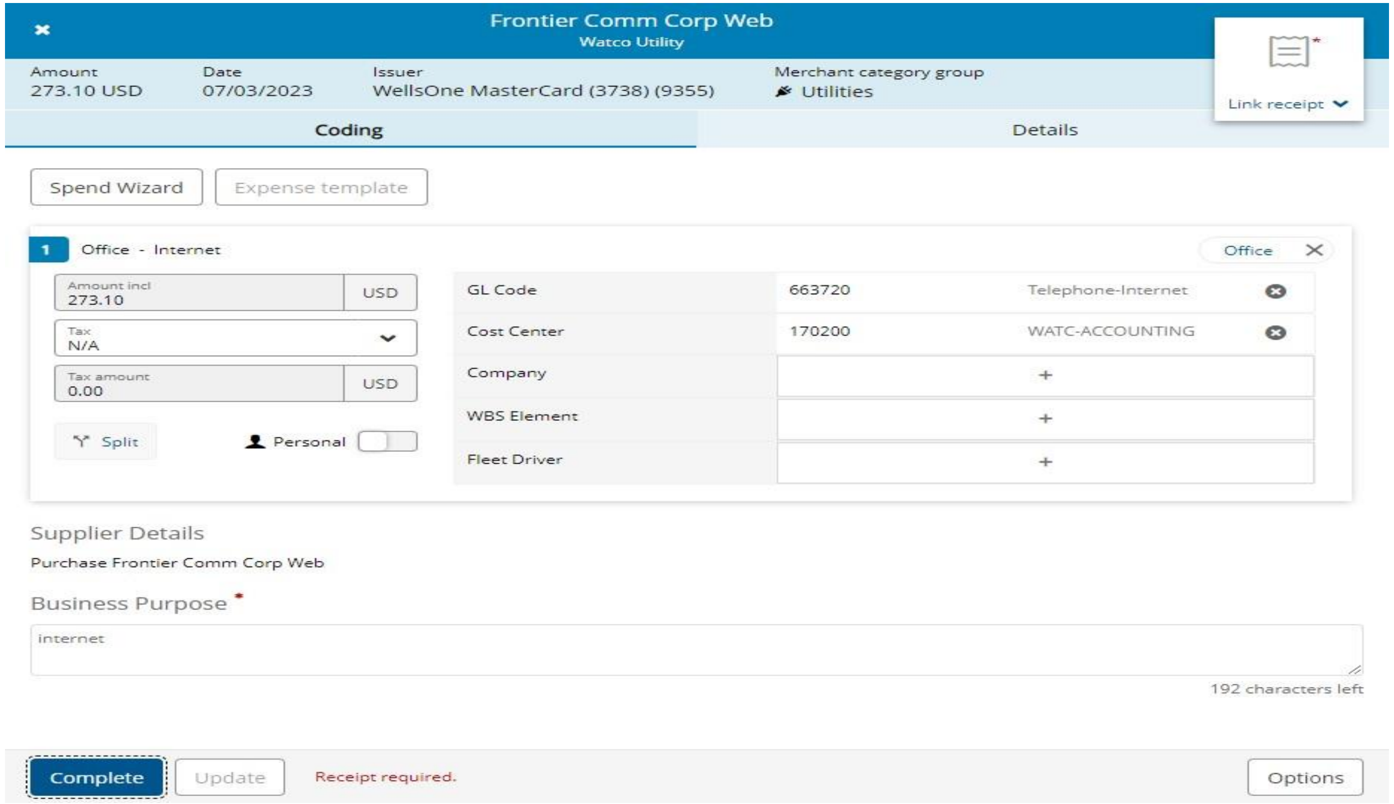


Once you have selected a **Spend Wizard**, allocate the amount of the transaction using the itemized boxes

Office, for example, lets you itemize such things as courier, maintenance and cleaning, postage, printing, and publications

Once finished, select **Next**

Spend Wizard



This brings you back to the Coding screen. Finalize any remaining required information and select **Complete**.

Please note: Detailed receipts/invoices must also be uploaded after coding is complete

Transaction Status

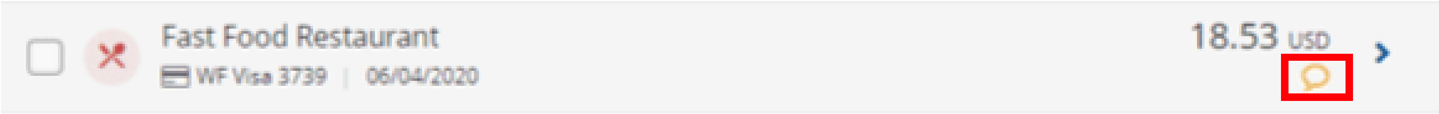
Transactions are loaded daily and will appear once they have posted to your account. Transactions can have three statuses: To Do, Pending Approval, and Completed.

To Do	Pending Approval	Completed
The item is missing required coding, receipts, or other information that needs to be entered	The item requires approval	The item has been viewed, approved, and no further action is necessary

Approval Comments

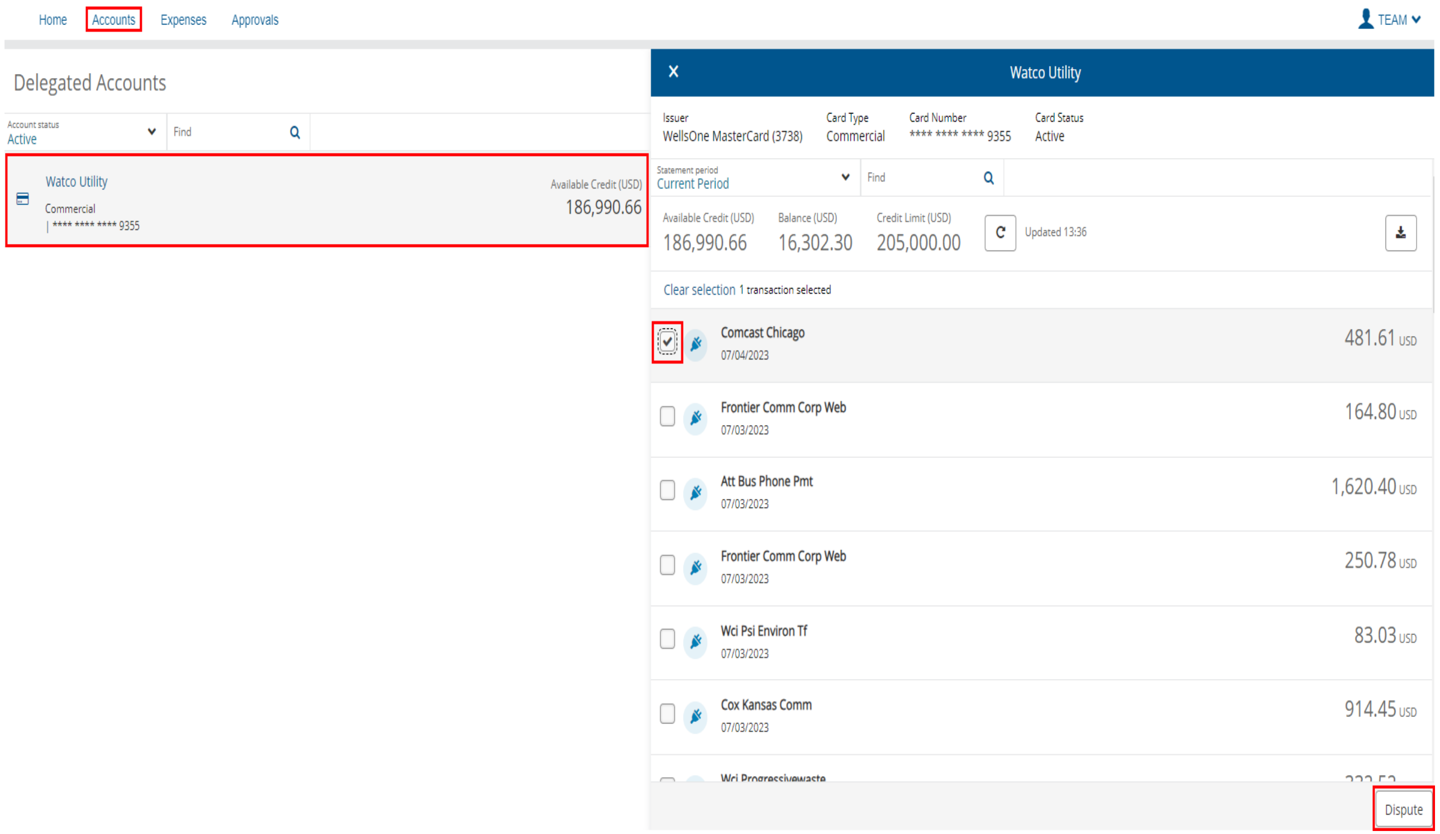
If the approver for your transaction needs more details, they will send the expense back to you with a note. You will see a yellow comment bubble next to the transaction that needs more information.

- Select that transaction and you will see **Information Required** at the top
- Scroll to the bottom to find the approver's note
- Once you remedy the issue, you must enter your own comment and select **Complete** to send it back to the approver



Note: When returning the expense for approval, a comment is required. If you do not include a comment, that expense will not be sent back for approval.

Disputing Transactions from Accounts Tab



To dispute a transaction, you will select the **Accounts** tab, then select on the Commercial Card account

Next, select the statement period in which the transaction occurred

Select the transaction you want to dispute, and a Dispute button will appear

Disputing Transactions

Next, fill out the Dispute transaction details, first choosing the Dispute type:

- Duplicate Transaction
- Cancelled Transaction
- Incorrect Amount
- Merchandise/Service Not Received
- Defective Merchandise/Service
- Paid by Other Means
- Credit Not Posted
- Returned Merchandise

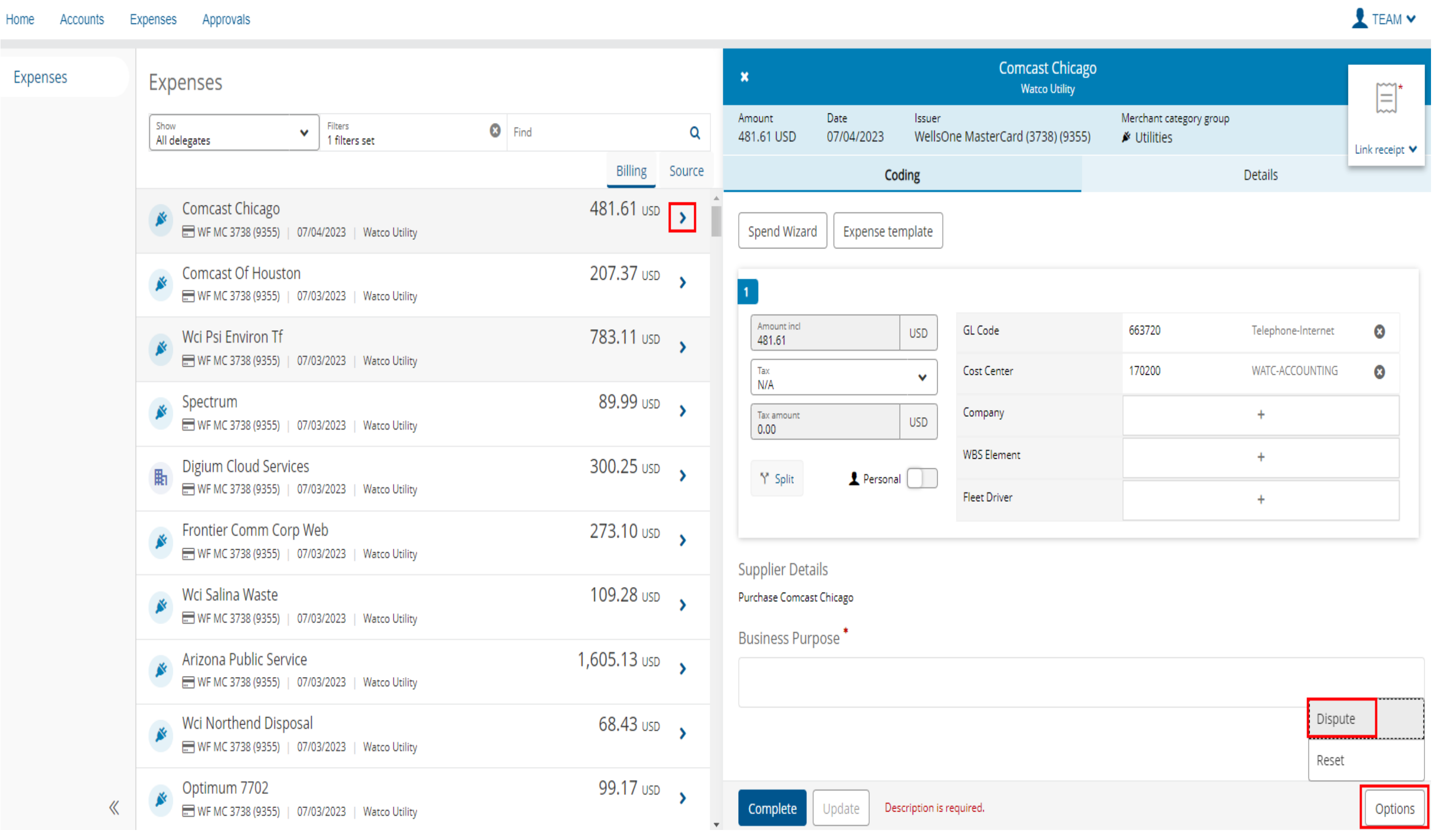
You will also need to provide your phone number, email address, and any comments you would like to make

Select Dispute. Review all information and select **Submit.**

Note: Prior to filing a dispute, you must contact the merchant and attempt to resolve your dispute

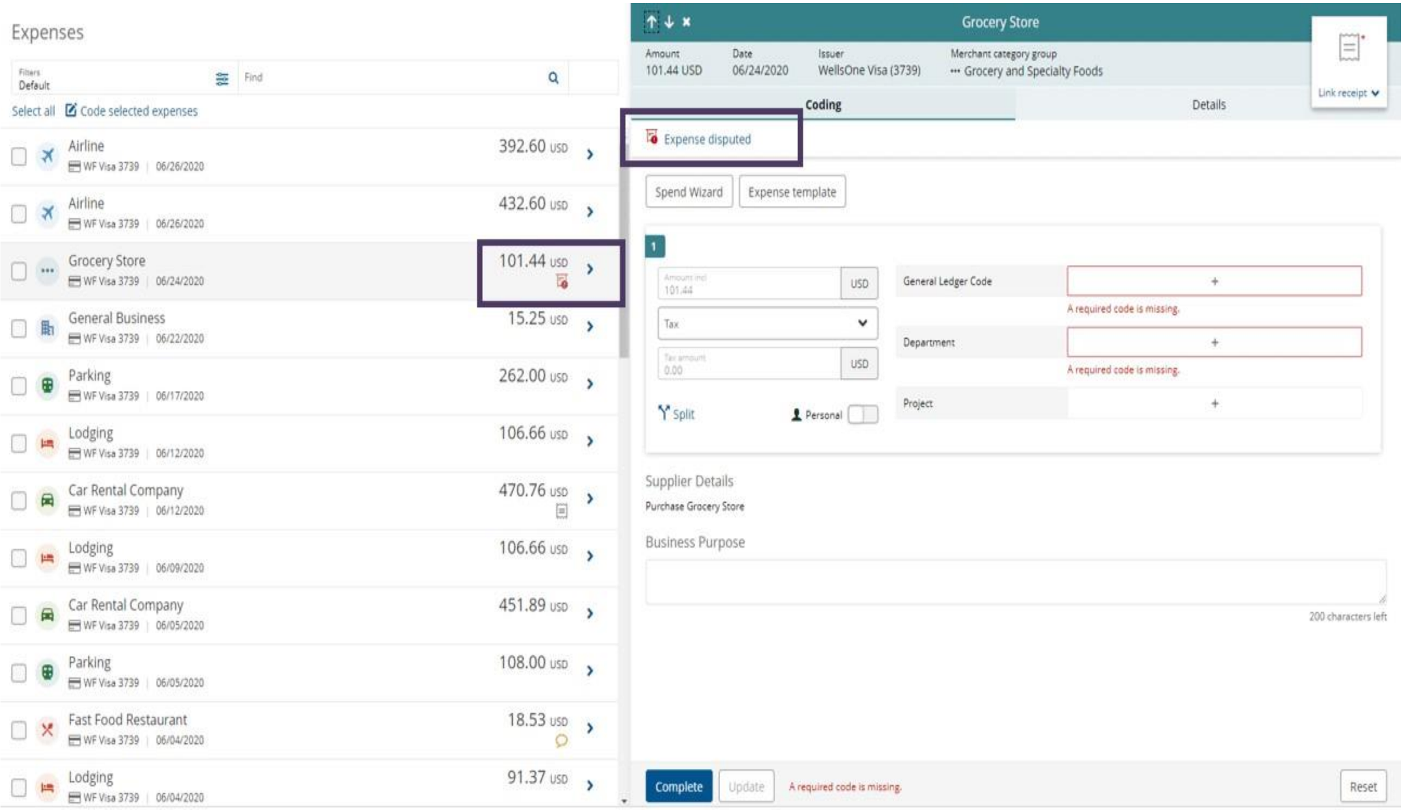
Fraudulent transactions and disputed transactions are not the same. Cards with fraudulent activity must be closed by contacting Wells Fargo customer service at the number on the back of your card.

Disputing Transactions from Expenses



To dispute a transaction from your Expenses To Do list, select the transaction you would like to dispute, then select **Options** and then **Dispute**

Disputing Transactions



Once you have disputed a transaction, you will see that transaction notated with a red receipt and exclamation point icon both on the expense To Do list and within the expense itself

To view the details of the dispute including the reason and date submitted, select **Expense Disputed**

Fraudulent Activity

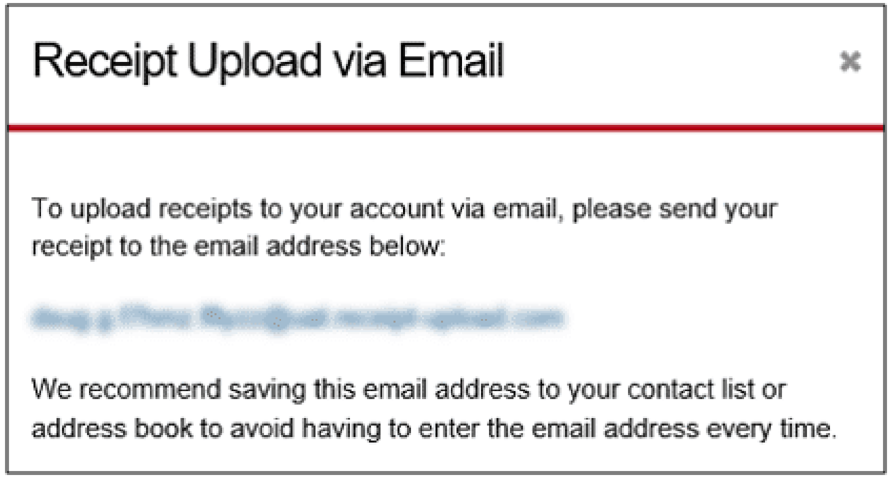
The following criteria and steps must be taken for fraudulent card activity:

- Cardholder is completely unaware of the purchase and has never done business with the merchant
- Cardholder must contact Wells Fargo by phone immediately to report all fraudulent activity
- The card will be closed, a new card issued, and a fraud case created by Wells Fargo
- The cardholder should email the Watco Purchase Card Team at purchasecard@watco.com to provide the physical address for FedEx shipment of the replacement card where someone will be available to sign for the delivery
- Fraudulent charges should **not** be disputed through WellsOne Expense Manager
- A description of "fraud" should be applied to the transaction
- Wells Fargo will conduct an investigation and issue a credit when appropriate

Receipt Management

There are three ways to upload receipts to the Image Library:

1. Email the image to your library using the unique email address available through the image library or the Personal Settings Menu. Images must be an attachment and not in the body of the email itself.
2. Upload an image from the files on your desktop and attach directly to a transaction
3. From the mobile app, you can take a picture and upload the image

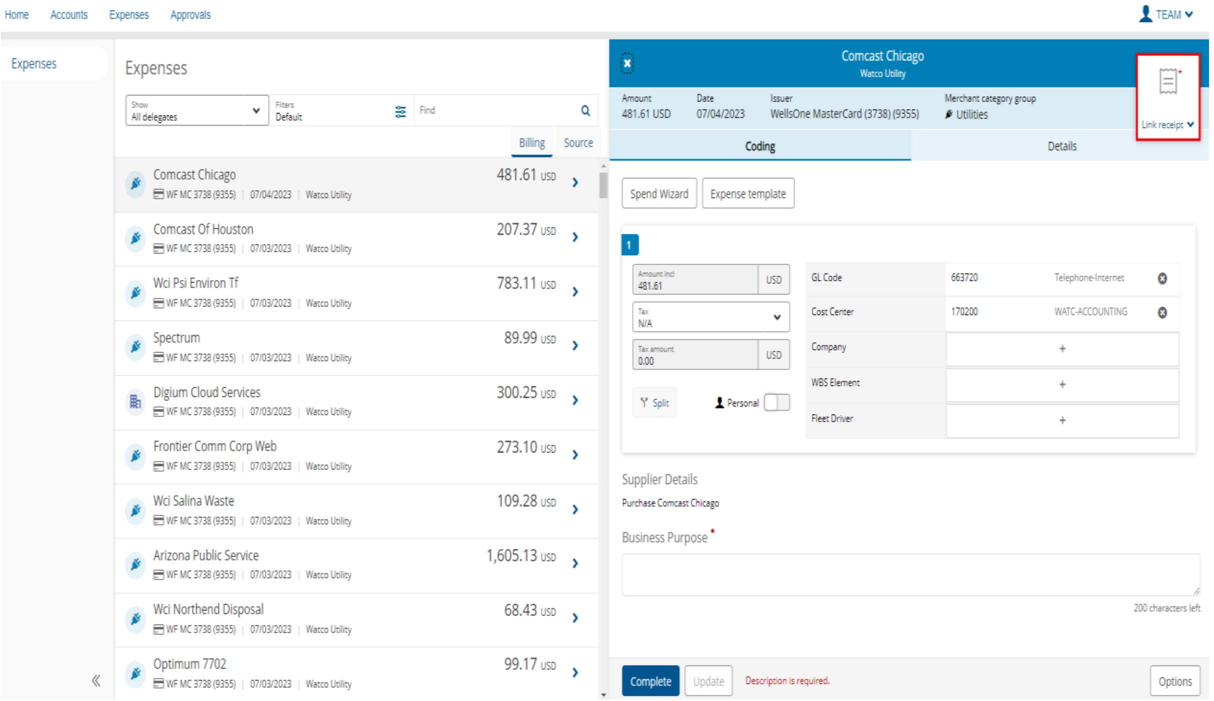


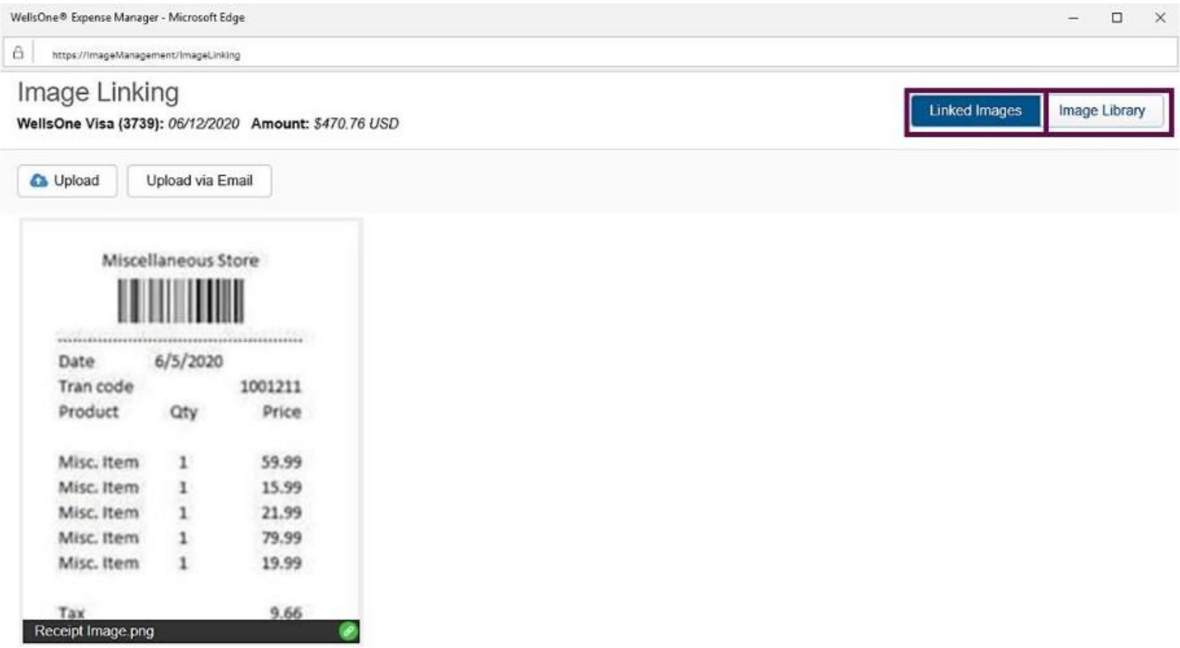
Receipt Management

Upload an image from the files on your desktop and attach directly to a transaction:

- Select a transaction that you would like to link a receipt to
- The Link Receipt icon is featured on the Transaction Details Screen on the right side of the screen
- Select **Link Receipt** then select **Image Library**. The Image Linking screen will display.

If you would like to add a receipt for a transaction that hasn't posted yet, select the **plus sign** and then **Receipt** on the left side of the screen





Receipt Management

From the mobile app, you can take a picture and upload the image. This will be explored more in the Mobile App section.

Receipt images

- Select either **Linked Images** to display images that have been linked to transactions or **Image Library** to display both linked and unlinked images in your image library.
- If the image has not been uploaded, select **Upload** to locate and select the desired image
- Linking an image to a transaction automatically changes the **Receipt Attached** dropdown to Yes

Note: You can reuse a linked image with another transaction

Optical Character Recognition

Optical Character Recognition, or OCR, lets users upload receipts and match them with transactions

- OCR uses the date, supplier name, and/or transaction amount to match a receipt image to a transaction
- Supported file types are PDF, PNG, and JPEG

Note: Image files must be between 150 KB and 4.8 MB

Approver View

As an approver, your home page will provide a brief summary of the expenses waiting for your approval

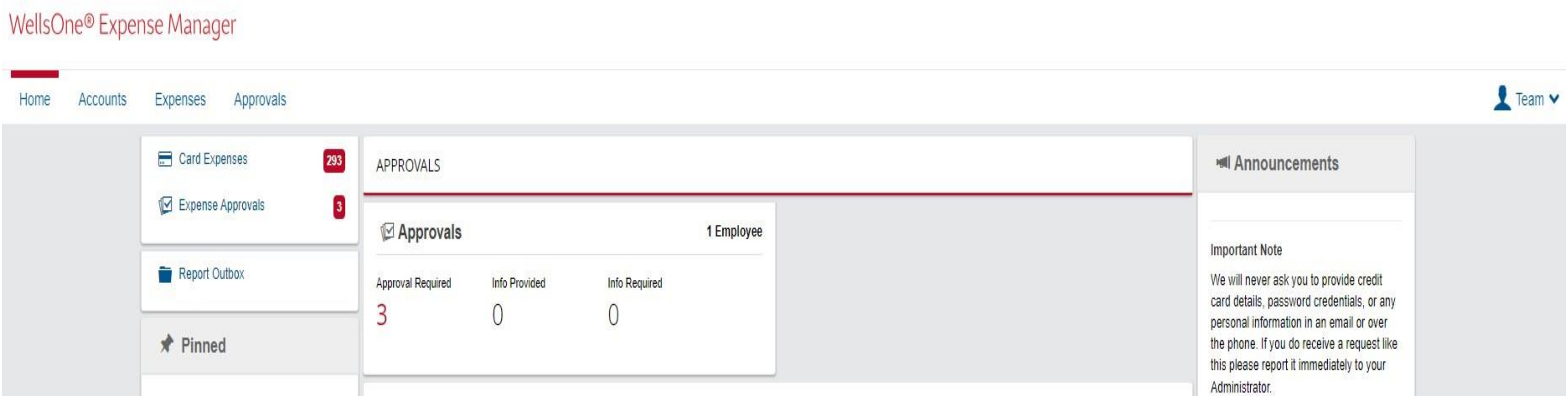
The top menu bar includes links for **Home** and **Approvals**. If you are also a card holder, you will also see links for **Accounts** and **Expenses**

Expense Approvals in the left navigation menu shows a count of items requiring your approval

The **Approvals** section shows the number of items needing your attention. Expenses with additional details being sent back to you are under **Info Provided** and items where you have requested further details are under **Info Requested**.

At the far right, you will see an **Announcements** box. Any important notes regarding the system will be posted here.

You may receive periodic system-generated emails with the transactions ready for your approval

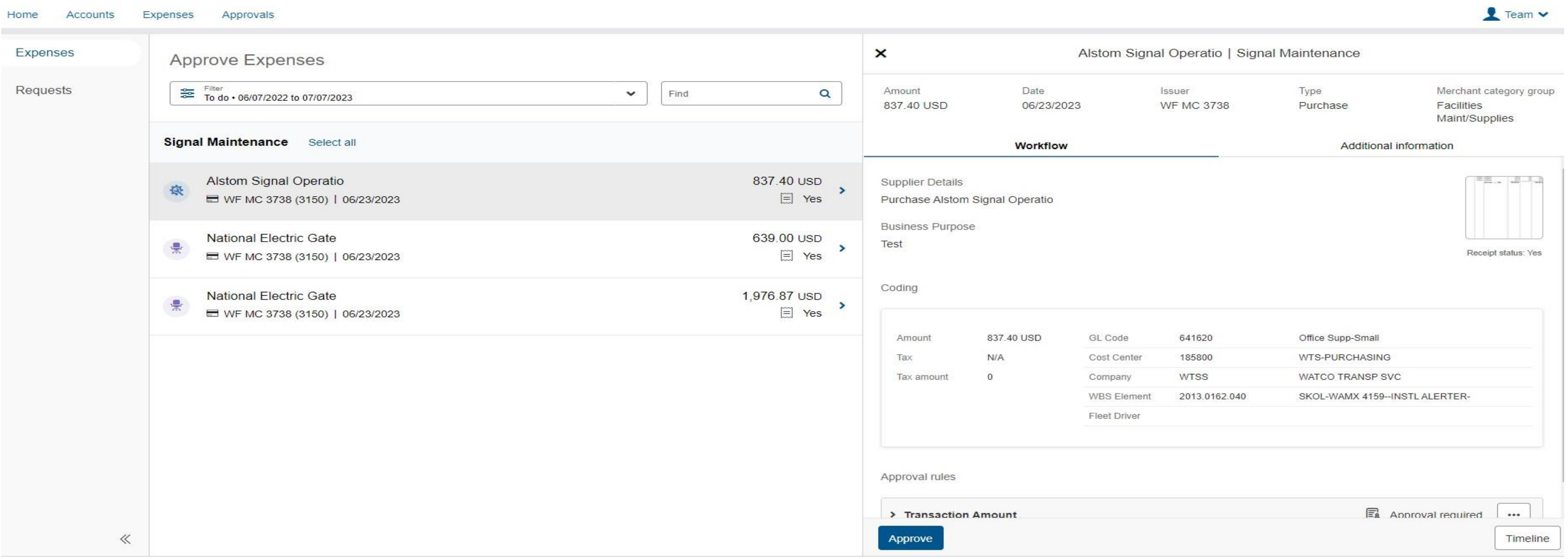


Approval Summary

To approve individual transactions, select the **Approvals** tab. You will see a list of transactions requiring your approval.

Select an expense to open. When the expense window opens, you will see the expense summary at the top.

In the larger window, you can see the **Workflow** information, including the receipt image and coding details

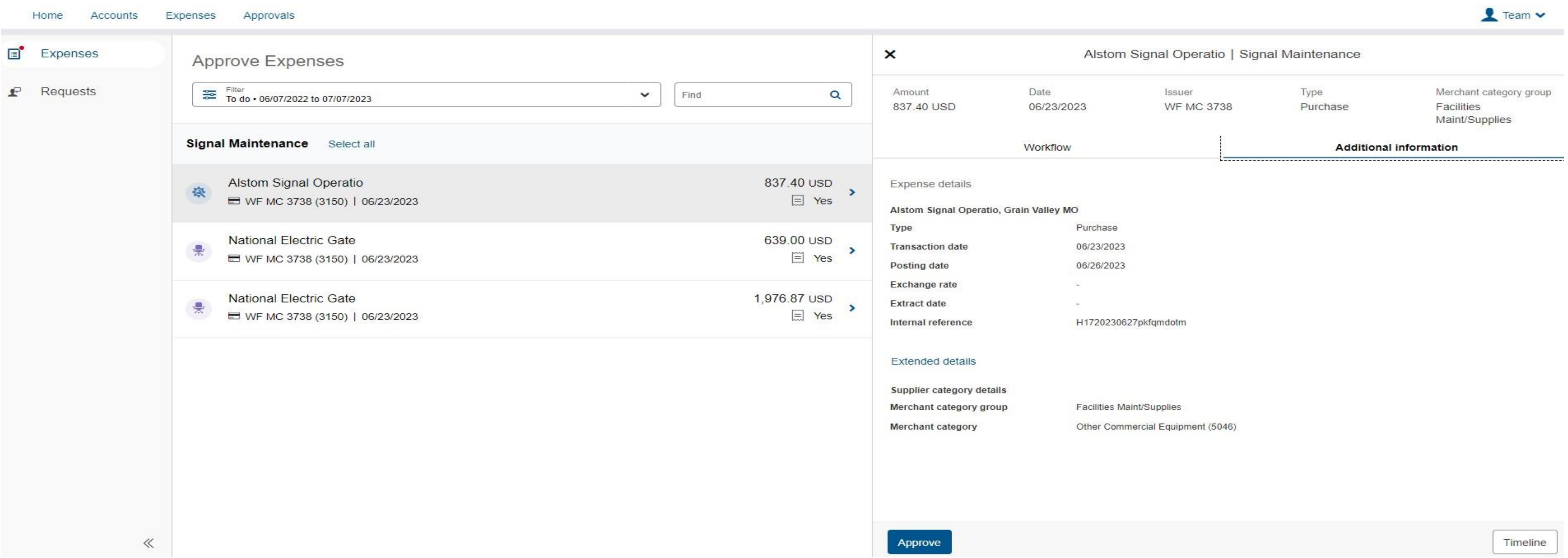


Approval Summary – Additional Information

The **Additional Information** tab provides extended transaction details, including transaction date and posting date

The **Timeline** button at the bottom right shows the details about the expense requesting process, such as when it was created and coded

When you are ready to approve the transaction, select **Approve**



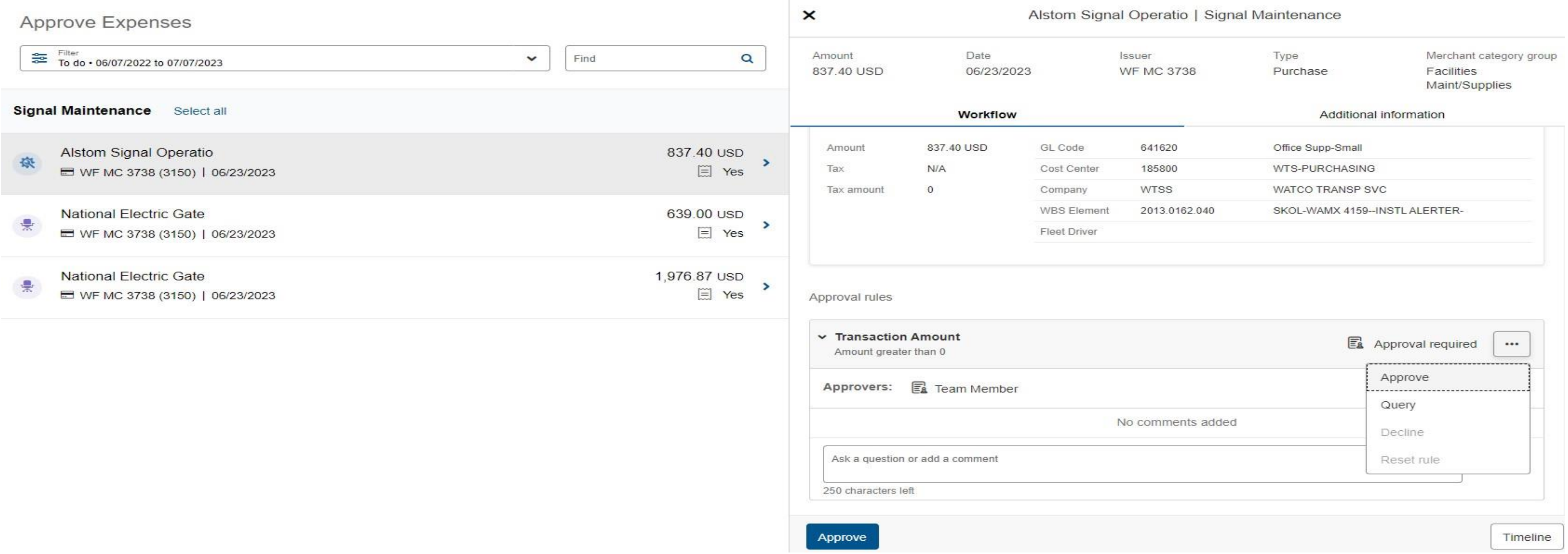
Approval Summary – Transaction Query

If additional information is needed for a transaction, select **Query** from the menu button, enter a comment, and select **Send**. (You can also select an approval rule and go directly to the comments section.)

This sends the transaction back to the cardholder/delegate so they can provide more information.

Once they respond, it will reappear in your To Do list.

Note: If returning an expense to the cardholder/delegate, a comment is required. When the cardholder/delegate sends the expense back for approval, a comment is also required. If the cardholder/delegate does not include a comment, the expense will not be sent back for approval.



Approval Summary – Batch Approval

The Approval expenses screen allows you to batch approve transactions by card

Choosing **Select all** next to a card takes you to the **Review expenses** screen

Approve expenses

Filter
To do • 02/04/2020 to 03/04/2021

Find

Wf Approver 4 Test Select all					
Restaurant	33.03 USD	WF Visa 3739 (9381)	05/26/2020	Yes	›
Grocery Store	32.52 USD	WF Visa 3739 (9381)	05/27/2020	Yes	›
Wf Cardholder 3 Test Select all					
Lodging	276.12 USD	WF Visa 3739 (9415)	06/11/2020	Yes	›
Fast Food Restaurant	12.40 USD	WF Visa 3739 (9415)	06/12/2020		›
Gas Station	20.75 USD	WF Visa 3739 (9415)	06/17/2020		›
General Business	15.25 USD	WF Visa 3739 (9415)	06/22/2020		›
General Business	11.95 USD	WF Visa 3739 (9415)	06/22/2020		›
Car Wash	14.00 USD	WF Visa 3739 (9415)	06/23/2020		›
General Retail	26.50 USD	WF Visa 3739 (9415)	06/23/2020		›
Airline	565.20 USD	WF Visa 3739 (9415)	06/26/2020	Yes	›

Approval Summary – Review Expenses

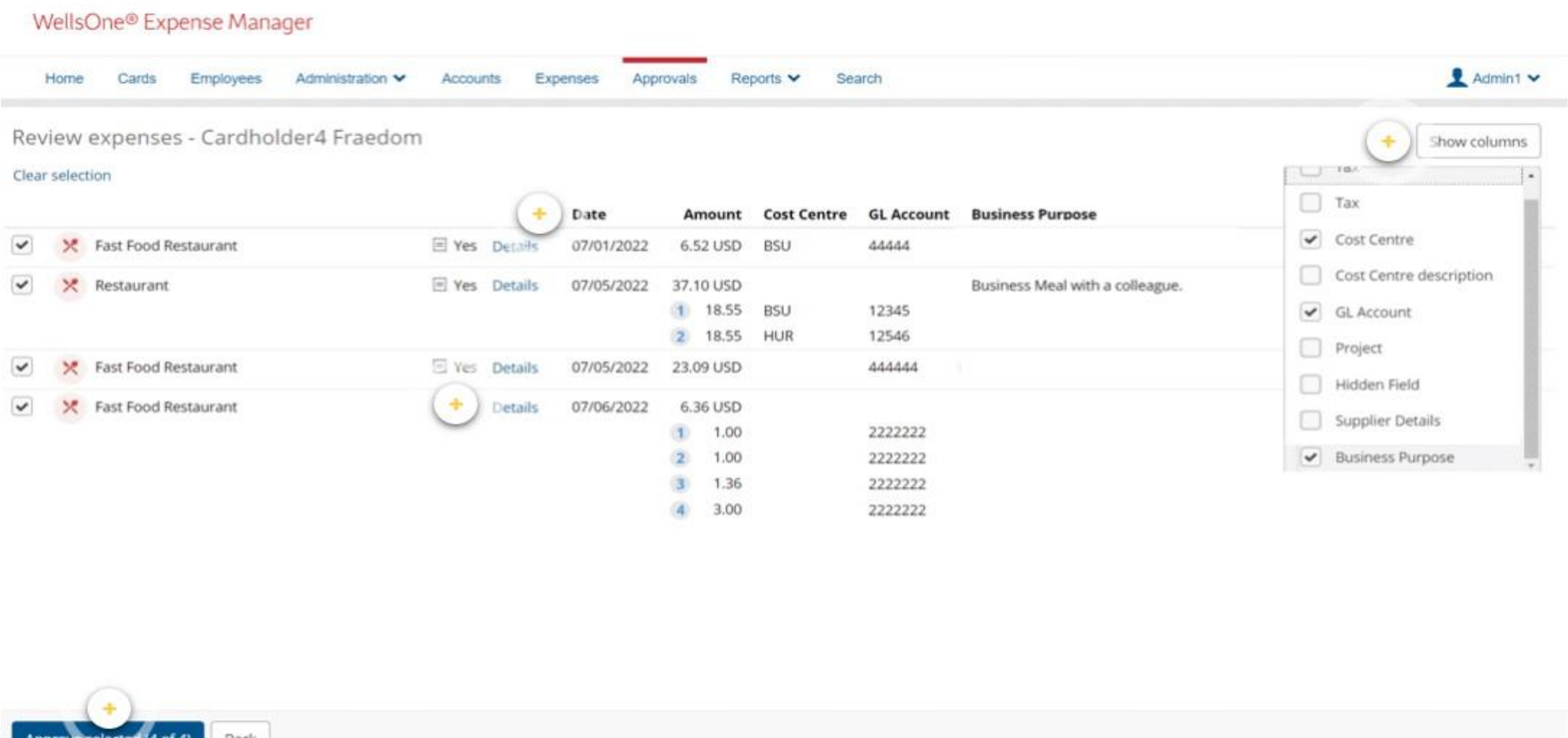
The Review expenses screen provides details needed to make your approval decision

The default **Review expenses** screen displays the merchant, transaction date, amount, and any associated finance codes

To customize the information displayed, select **Show columns** on the right side

For more information about the transaction, and to view any attached images, query, or approval an individual transaction, select **Details**

To approve any marked transaction, select **Approve selected**. Be sure to un-check any transaction you do not wish to approve.



Transaction Status

Transactions will appear once cardholders/delegates have completed all required information and can have three statuses: To Do, Awaiting Response, and Completed

To Do	Awaiting Response	Completed
Item is ready to be approved and action is required	Additional information is required and has been requested	The item has been approved and no further action is necessary

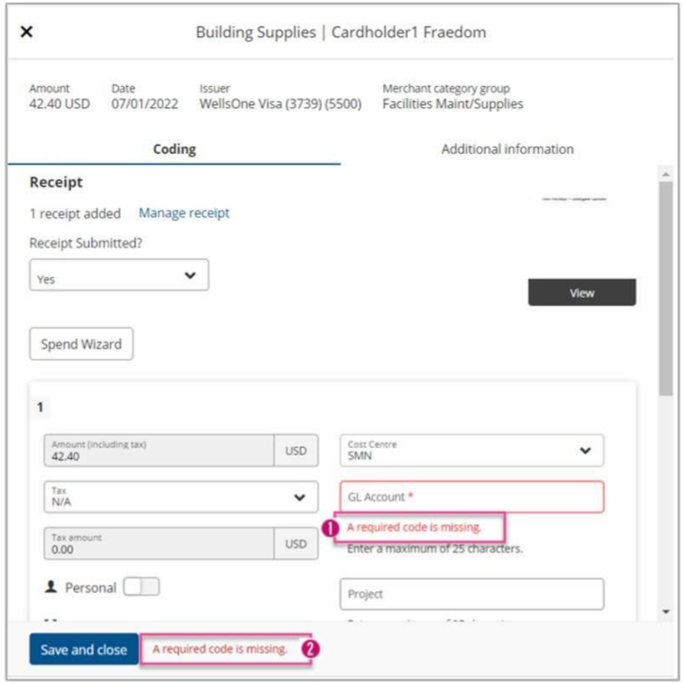
Edit Transactions

Approvers can edit transactions. When the approver selects an expense for approval, a read-only details pane displays at the right, with an **Edit** button.

The following fields are available to edit:

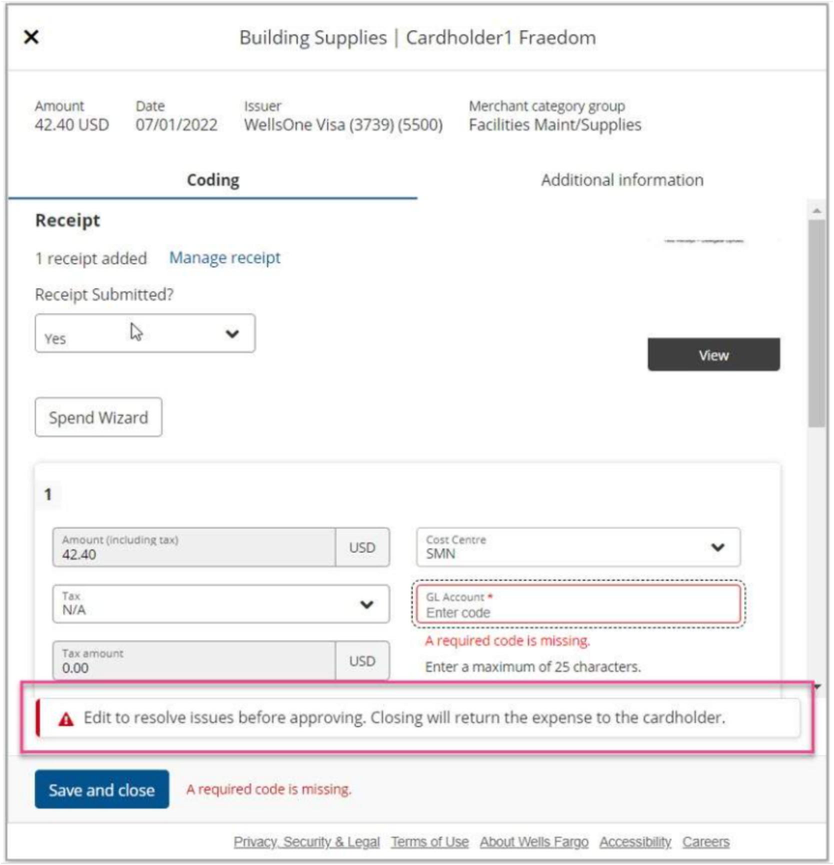
- Edit Coding
- Add a receipt (delete is not available)
- Add/Edit Business purpose

Edit Transactions

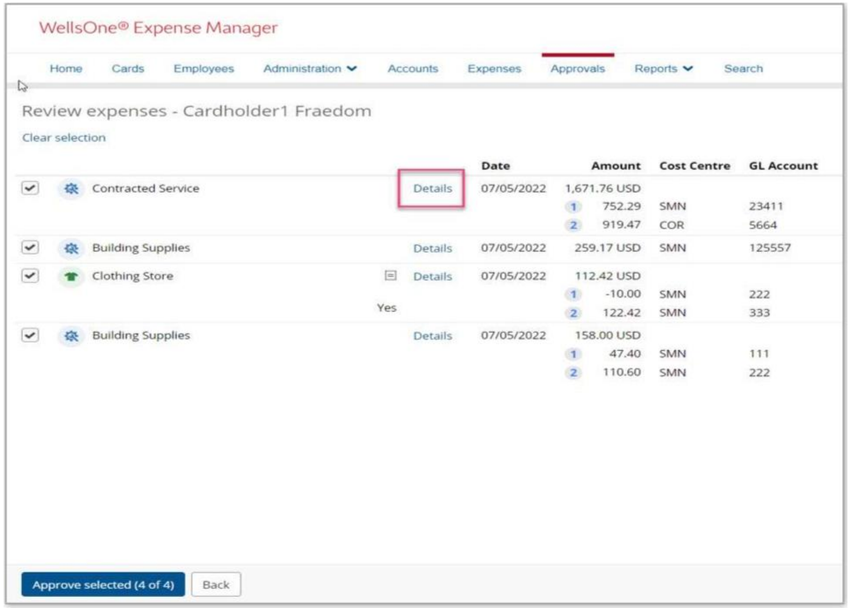


When the approver selects the **Save and close** button, if expense information is missing or incorrect, a message will display

The expense cannot be approved when "**A required code is missing**," as there is an outstanding validation issue



If the approver does not fix the missing or incorrect information and selects **Save and close**, they will be notified that continuing to close will return the expense to the card holder/delegate



When approvers use the **Select All** function on the **Review expenses** screen, expenses can be individually opened and edited by selecting **Details**

Mobile App Features

The WellsOne® Expense Manager mobile app helps you keep track of your business expenses and complete core tasks associated with approvals and transaction submissions. The app allows you to:

- Capture and manage receipts
- Add required information to transactions and submit for approval
- View card account and credit limit information
- Approve submitted card transactions
- Return transactions to submitter for additional information
- Split transactions

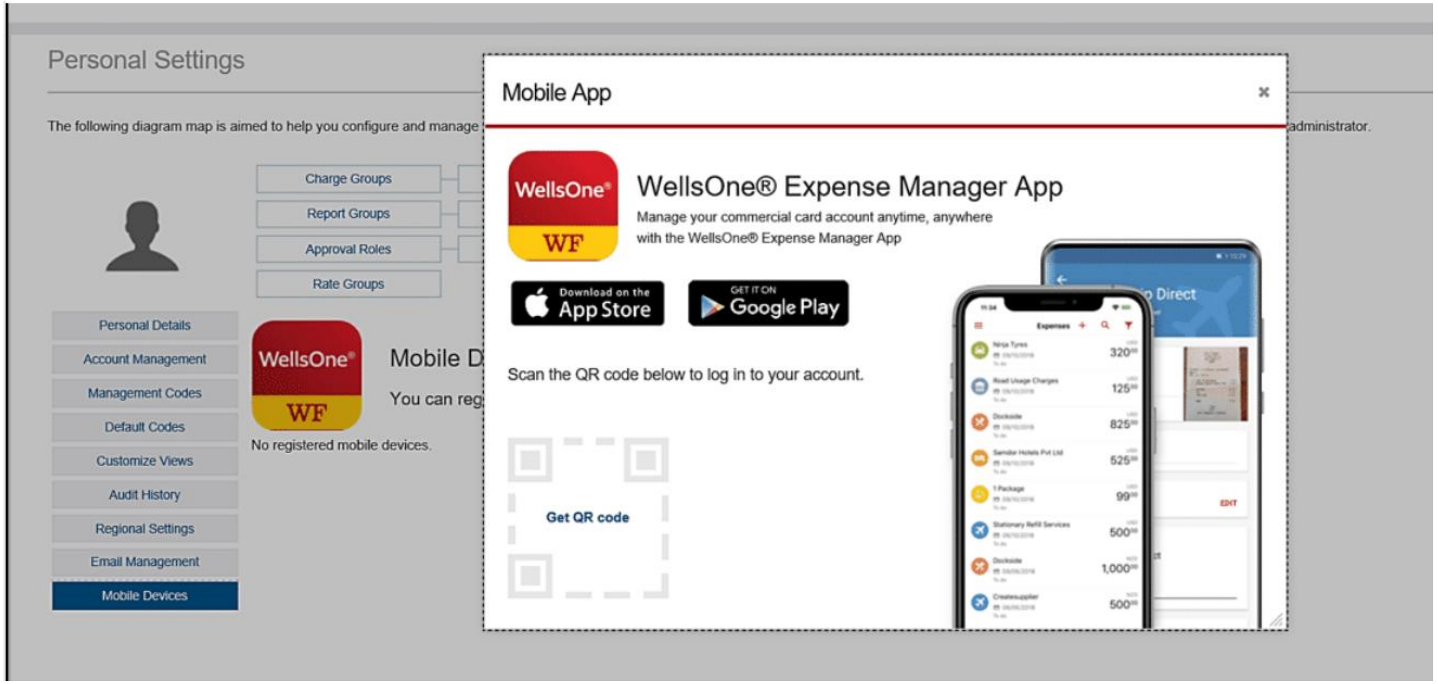
Mobile App

The WellsOne® Expense Manager app is available for both Apple and Android devices. You can download it by searching WellsOne® Expense Manager.

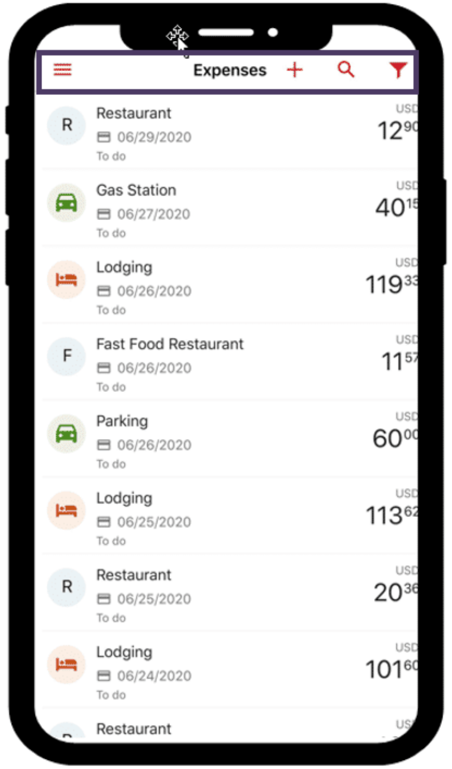
The first time you sign on to the app, you will be asked to register your profile. To do this, sign on to the WellsOne® Expense Manager website, select the person icon in the upper right, and select **Mobile App**.

Next, select **Get QR Code** to generate your unique account barcode. Then, launch the WellsOne® Expense Manager mobile app on your device and select **Use QR Code** to scan the code generated on the website.

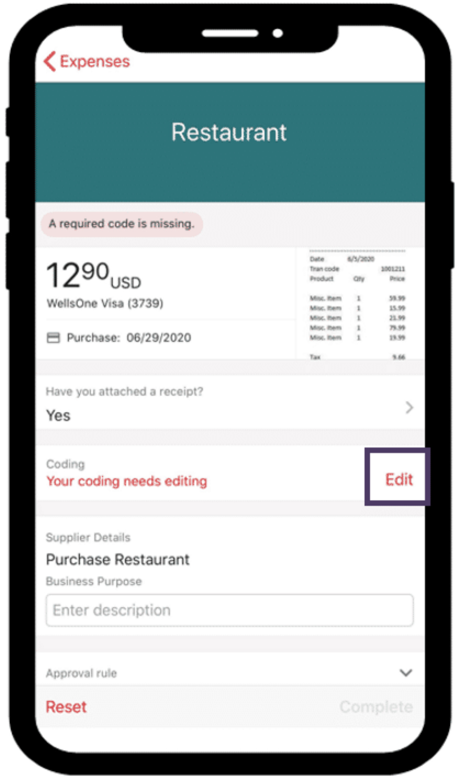
Once you are in your mobile app account, you will set up a five-digit PIN and can enable any device-supported biometric



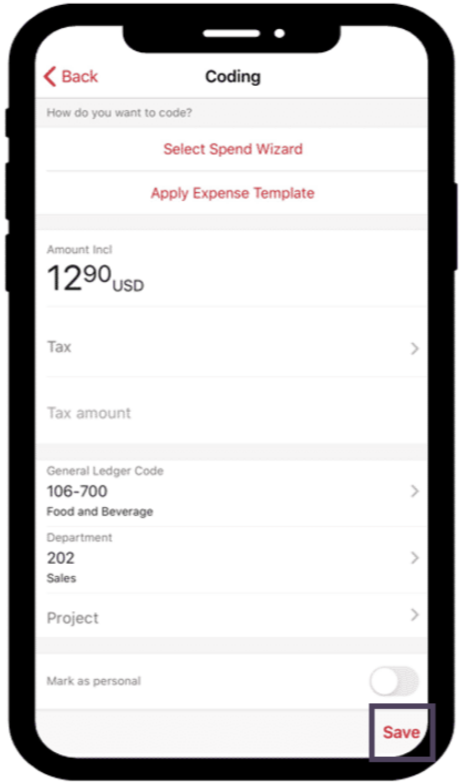
Mobile App – Cardholder View



From the Expenses screen, you can add receipts, and search or filter your expenses

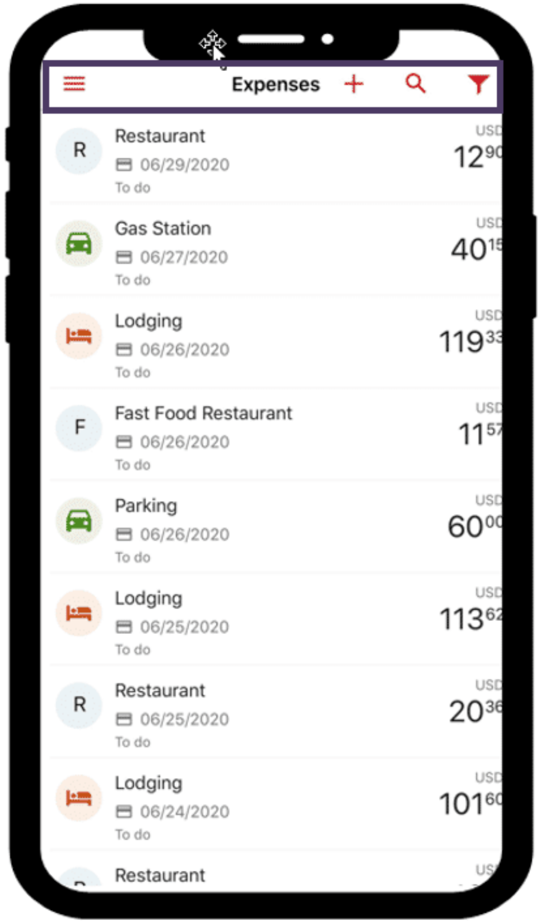


By default, you will see a list of transactions that require your attention. Select a transaction to view, and complete any required information, including adding a business purpose.



Select Edit on the expense details pane to view the Coding screen*. From this screen, you can search for individual codes, apply an expense template, or use Spend Wizard. Once complete, select Save. **Be sure to review the default coding applied by the system for accuracy before saving.*

Mobile App – Receipt Linking



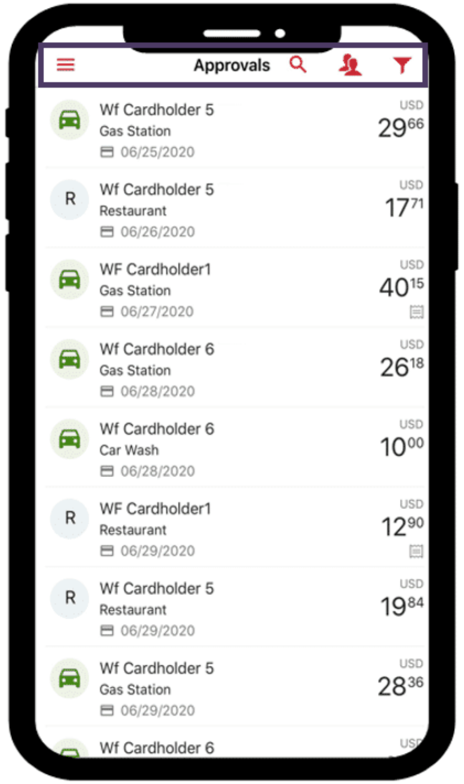
To add a receipt for a transaction that hasn't posted, select the plus sign, then select the camera or gallery icon

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

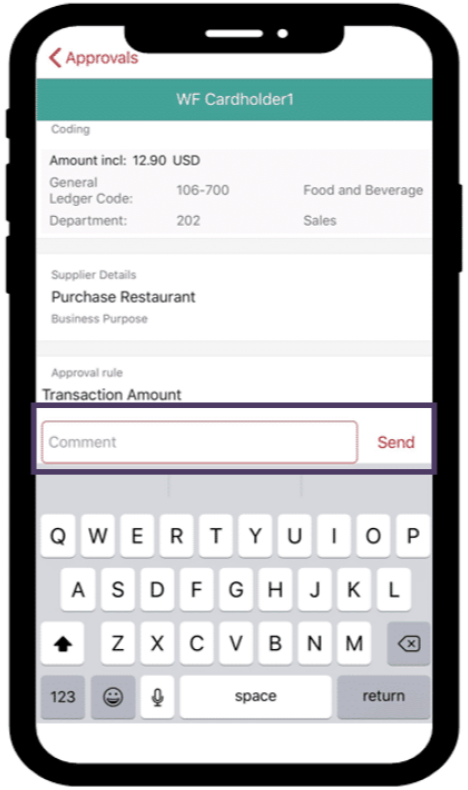
To use a previously uploaded image, select **Receipt gallery**, then perform one of the following:

- 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 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**.
- To add a receipt for a transaction that hasn't posted, select the plus sign, then select the **Camera** or **Gallery** icon

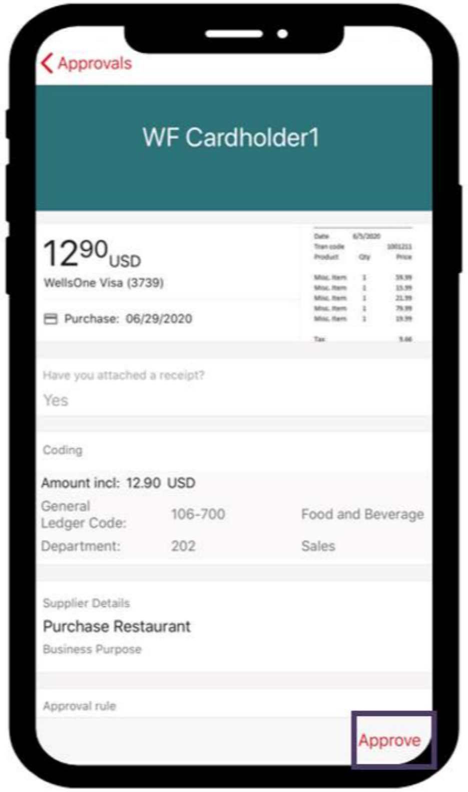
Mobile App – Approver View



From the Approvals screen you can select specific team members 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 and select **Send** to return the item to the team member.



Select Approve to approve the expense.

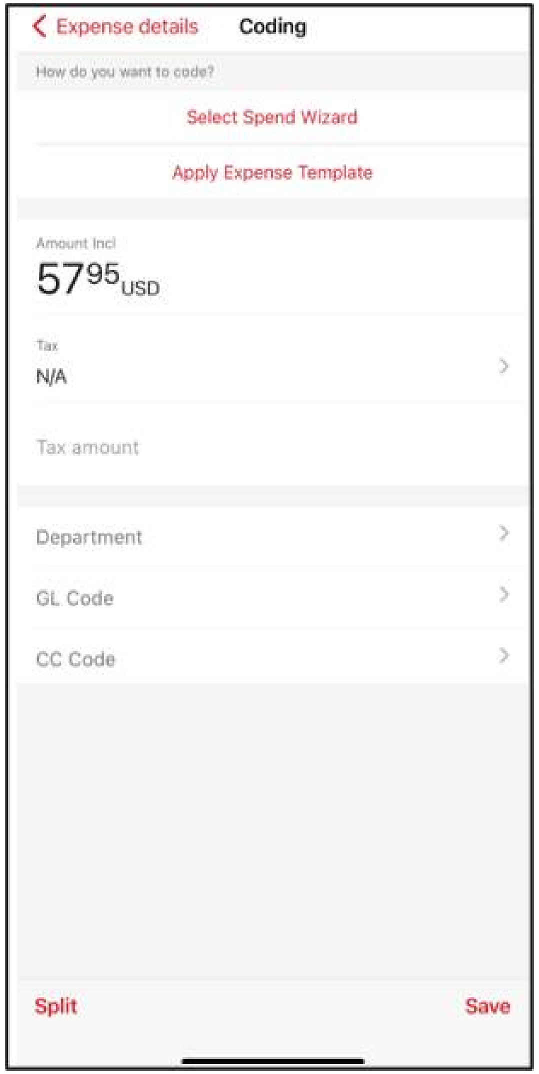
Mobile App – Split Transactions

The mobile app includes functionality that enables mobile users to split coding lines. This applies to both cash and card expenses. The splits can be done with or without Spend Wizard.

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.

Upon tapping the **Split** button on the manual coding screen, a new subpage will load, where the user can split a single line into multiple lines



Mobile App – Split Transactions

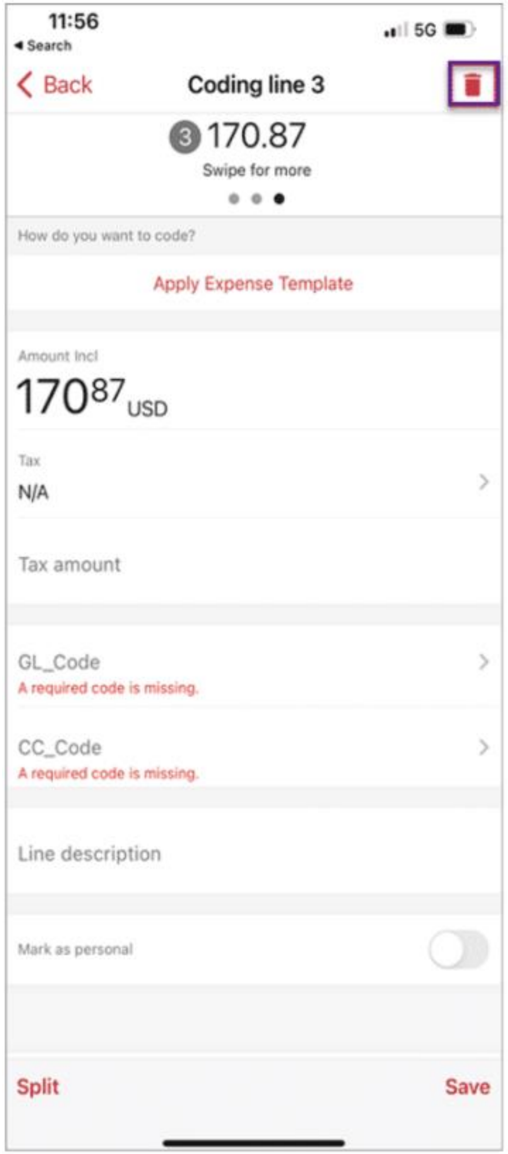
Any outstanding amount after user enters Amount or % will be calculated and displayed in the **Amount to allocate/Amount to reduce** section

Selecting **Add line** will continue to add lines for coding while providing the line number

The **Amount {Currency}** and % input fields have empty values when the page is loaded initially. Split coding amount can be entered by amount or %.

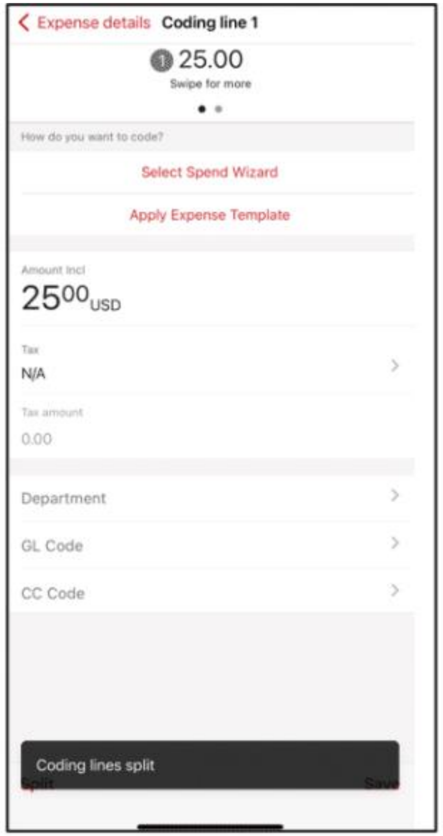
You can also toggle the **Split evenly** button

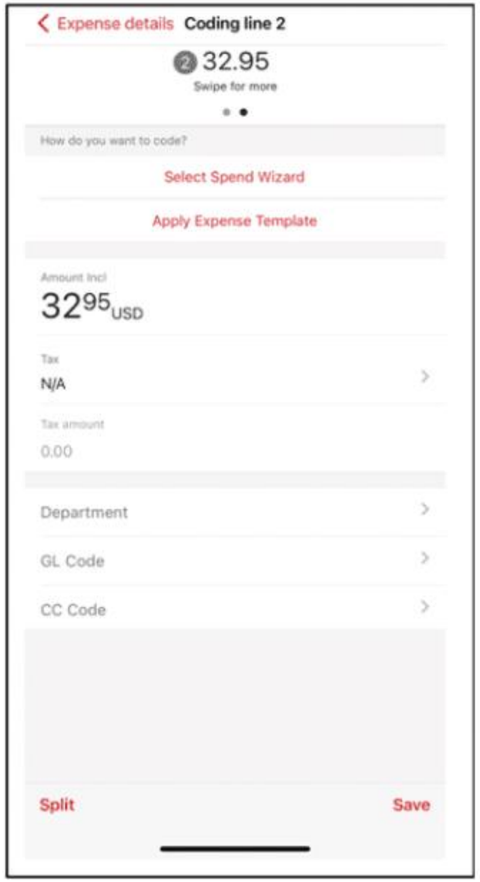
After splitting an expense into multiple coding lines, cardholders can delete a coding line by tapping the delete Icon



Mobile App – Split Transactions

The label for the manual coding page header is dynamic with a coding line number. The page header will begin with Coding line 1, then Coding line 2, etc.





Cardholder Reminders

- Collect your receipts to verify purchases, required by the Watco Expense and Travel Policy
- Purchase card expenses must be reviewed weekly by the cardholder/delegate and approver. Habitually missed reviews will be referred to the team member's manager for resolution by the Purchase Card Team, which may result in temporary or permanent suspension of the card.
- Keep your card in a secure location, and keep your number confidential. Never provide the full card number through email or text.
- Check your email for notifications of items requiring action
- Complete outstanding items in a timely manner
- Record the WellsOne Service Center number located on the back your card in your phone, or address book
  - U.S. and Canada (800) 932-0036; Australia (612) 332-2224
- Contact the WellsOne Service Center immediately if your card is lost or stolen, or you notice fraudulent transactions
- When contacted the WellsOne Service Center, you will be asked for a unique ID. *For purchase cards this is the last 4 digits of the card holder SSN (TFN – Australia, SIN – Canada). For fleet cards this is the last 4 digits of the VIN*
- Additional WellsOne training resources can be found on the WellsOne Expense Manager Resources page

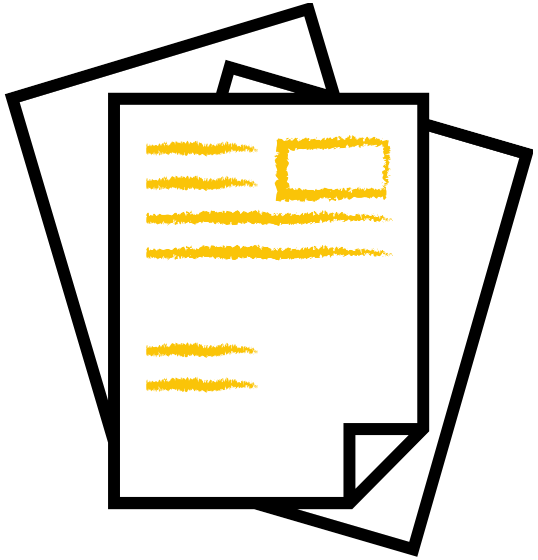
Additional Training Resources

Additional training resources are available directly from Wells Fargo:

On demand and live videos:

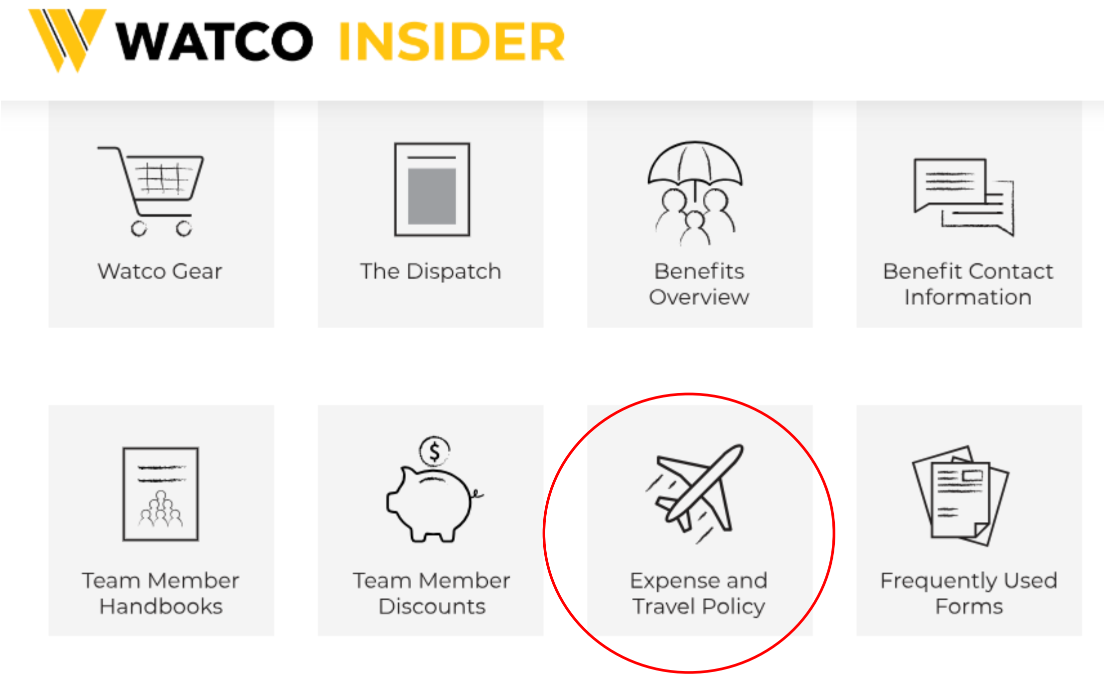
- Cardholder, Delegate, and Approver On Demand Training Video
- Live Instructor-Led Webinar Training: Select the "WellsOne Expense Manager: cardholder" button and choose the month. Sessions are on Wednesdays at 11:00 am CT; a pre-recorded version is available here. This training is for Cardholders, Delegates, and Approvers.

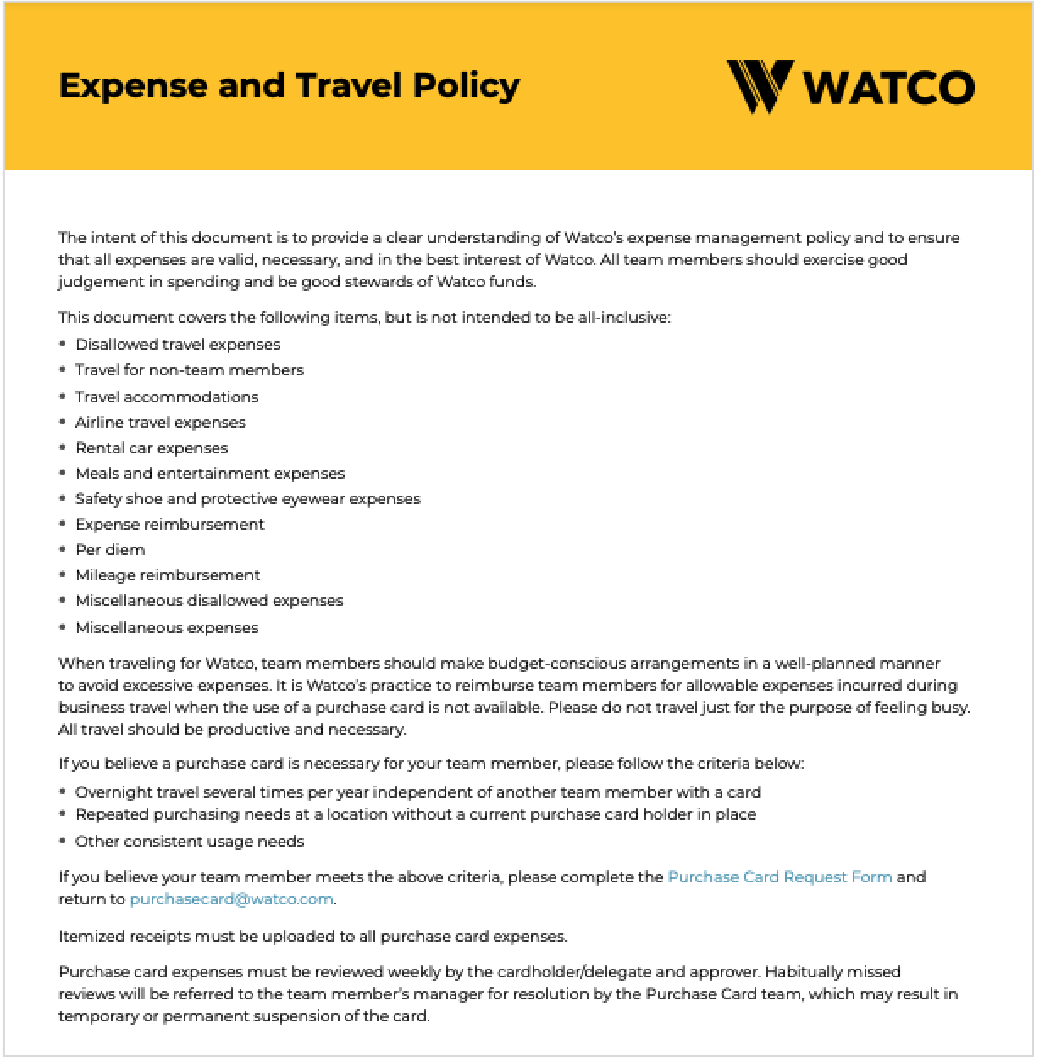
- Quick Reference Guides (QRG):
  - Cardholder/Delegate QRG (PDF) En Español (PDF)
  - Approver QRG (PDF) En Español (PDF)
  - Mobile QRG (PDF) En Español (PDF)



New Watco Expense and Travel Policy

- Find information on air travel, lodging and reimbursement for business expenses, and purchase card guidelines
- Review the new Watco Expense and Travel Policy on [Watco Insider]





Expense and Travel Policy

WATCO

The intent of this document is to provide a clear understanding of Watco's expense management policy and to ensure that all expenses are valid, necessary, and in the best interest of Watco. All team members should exercise good judgement in spending and be good stewards of Watco funds.

This document covers the following items, but is not intended to be all-inclusive:

- Disallowed travel expenses
- Travel for non-team members
- Travel accommodations
- Airline travel expenses
- Rental car expenses
- Meals and entertainment expenses
- Safety shoe and protective eyewear expenses
- Expense reimbursement
- Per diem
- Mileage reimbursement
- Miscellaneous disallowed expenses
- Miscellaneous expenses

When traveling for Watco, team members should make budget-conscious arrangements in a well-planned manner to avoid excessive expenses. It is Watco's practice to reimburse team members for allowable expenses incurred during business travel when the use of a purchase card is not available. Please do not travel just for the purpose of feeling busy. All travel should be productive and necessary.

If you believe a purchase card is necessary for your team member, please follow the criteria below:

- Overnight travel several times per year independent of another team member with a card
- Repeated purchasing needs at a location without a current purchase card holder in place
- Other consistent usage needs

If you believe your team member meets the above criteria, please complete the Purchase Card Request Form and return to purchasecard@watco.com.

Itemized receipts must be uploaded to all purchase card expenses.

Purchase card expenses must be reviewed weekly by the cardholder/delegate and approver. Habitually missed reviews will be referred to the team member's manager for resolution by the Purchase Card team, which may result in temporary or permanent suspension of the card.