WELLS FARGO

SettleUp

Help

#FFFFFF

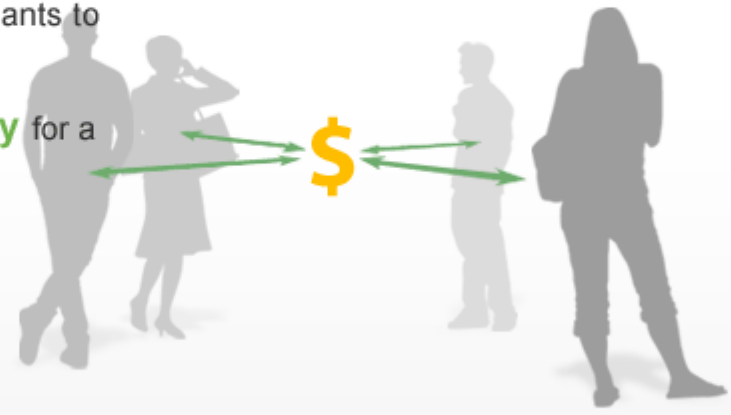
NOTE: unless otherwise indicated, default text color is #333333

SettleUp is a new service from Wells Fargo that allows you to easily **split costs** for shared events between people — like a **ski trip, surprise birthday party, or family reunion.**

It's ideal for any event where you need participants to **pitch in** for several shared expenses.

SettleUp also makes it easy to **collect money** for a gift or donation.

If you've ever shared costs for a group event **— you need SettleUp!**



Get Started and Enroll Now

1 px #6DAC6D

#F5F5F5

16 px. Arial Bold

Sign On

12 px. Arial Bold

Username

Password

Go

12 px. Arial Regular

I forgot my password

#336699

#F5F5F5

WELLS FARGO

SettleUp

12 px Arial Bold, #336699
same specs for reg. rollover & visited

Sign Off | Help

Events | People | Profile

14 px Arial Bold, #333333

14 px Arial Bold, #999999

New Event >> View Totals >> Send IOUs

16 px Arial Bold, #6EB349

Event Details

12 px Arial Regular / Bold #333333

This page allows you to add participants and calculate a single or multiple shared expenses for the entire event
Click **View Totals** to go to the next step when you're finished entering details. To save your work, click **Save for later**.

NOTE: unless otherwise indicated, default text color is #333333

Event Name

Event Date

Event Description (optional)

12 px Arial Regular / Bold #333333

#E8EF7C

1 px #AFAFAF

Expense Winery Rental **Cost** $555.00 — 32 px

Who paid for this Expense? Select Payer(s)

Who else participated? Select Participants

12 px Arial Regular, underlined #336699

1 px #AFAFAF

1 px #FFFFFF

10 px Arial Regular #CCCCCC

10 px Arial Regular #336699

#F6F6F6

#CECDCD

#EBEBEB

Participants	Already Paid ? [reset split evenly]	Share per Person ? [reset split evenly]	Remove
Avery Alda	0.00	138.75	✕
Liz Montana (Payer)	277.50	138.75	✕
Mark Lennon	0.00	138.75	✕
Pat Smith (Organizer, Payer)	277.50	138.75	✕
Totals	$555.00	$555.00	

12 px Arial Bold, #333333

1 px #FFFFFF

14 px

20 px

Expense Enter a name for this expense **Cost** Enter the cost of this expense

#F4F7BE

Expense Enter a name for this expense **Cost** Enter the cost of this expense

10 px

Cancel | Save for later | View Totals >>

1 px #CCCCCC

Events | People | Profile

New Event >> View Totals >> Send IOUs

Event Details

This page allows you to add participants and calculate a single or multiple shared expenses for the entire event
Click **View Totals** to go to the next step when you're finished entering details. To save your work, click **Save for later**.

Event Name

Event Date

Event Description

Who participated in this expense?

22 px

People Add a new person

12 px

A-E F-J K-N O-R S-W X-Z

☑	**Liz Montana**	lizmontana@gmail.com
☐	**Mark Lennon**	mlennon@hotmail.com
☐	**Pat Smith (Organizer)**	psmith@yahoo.com

205 px

10 px 10 px

60 px

Payer(s)

Liz Montana

Cancel Save

What are your sh

Expense

Who paid for th

Who else parti

768

Expense Enter a name for this expense Cost Enter the cost of this expense

Expense Enter a name for this expense Cost Enter the cost of this expense

Cancel Save for later View Totals >>

WELLS FARGO

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Events | People | Profile

New Event >> View Totals >> Send IOUs

Event Details

This page allows you to add participants and calculate a single or multiple shared expenses for the entire event
Click **View Totals** to go to the next step when you're finished entering details. To save your work, click **Save for later**.

Event Name

Event Date

Event Description

Add a New Person

Select Participants > Add a New Person

E-mail: aalda@yahoo.com, lizmontana@gmail.com, mlennon@hotmail.com,

1 px # CCCCCC

11 px Arial Regular # 999999

Please provide first and last names for these email addresses

aalda@yahoo.com	First Name	Last Name	( ) -	(Phone, Optional)
lizmontana@gma...	First Name	Last Name	( ) -	(Phone, Optional)
mlennon@hotmai...	First Name	Last Name	( ) -	(Phone, Optional)

12 px Arial Regular # 999999

Cancel | Save

What are your sh

Expense

Who paid for th

Who else parti

Expense: Enter a name for this expense — Cost: Enter the cost of this expense

Expense: Enter a name for this expense — Cost: Enter the cost of this expense

Cancel | Save for later | View Totals >>

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Events | People | Profile

Track Event Payments

NOTE: unless otherwise indicated, default text color is #333333

Track Event | View Event

1 px # AFAFAF

1 px # EBEBEB

10 px

Event Name	Mom's Big 40th Birthday Bash
Event Date (135 px)	03/25/2008
Event Description	We all agreed kids will pay for winery rental + food. Grandpa Chon will pay for Mariachi's (wrap at 475 px)
Event Status	IOUs Sent on mm/dd/yyyy

NOTE: header height for below modules can be one of two sizes:
32 px if the bar includes text fields,
25 px if the bar includes text only, as in this example

Payment Status (25 px)

Participant (12 px Arial Bold #666666)	IOU Amount	Fee ?	Amount Received	Pay To	Status	Date Paid	Actions
Avery Alda	$41.63			Liz Montana	Unpaid	mm/dd/yyyy	Note to Self | Nudge
Avery Alda	$97.13			Pat Smith	Unpaid	mm/dd/yyyy	Note to Self | Nudge
Total	$138.76						

12 px Arial Regular #666666

See the math

12 px Arial Bold #FE0000

14 px

10 px

Save

10 px

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Track Event Payments

NOTE: unless otherwise indicated, default text color is #333333

Track Event | View Event

1 px # AFAFAF

1 px # EBEBEB

10 px

Event Name	Mom's Big 40th Birthday Bash
Event Date (135 px)	03/25/2008
Event Description	We all agreed kids will pay for winery rental + food. Grandpa Chon will pay for Mariachi's (wrap at 475 px)
Event Status	IOUs Sent on mm/dd/yyyy

NOTE: header height for below modules can be one of two sizes:
32 px if the bar includes text fields,
25 px if the bar includes text only, as in this example

Payment Status (25 px)

12 px Arial Bold #333333

12 px Arial Regular #333333

Participant	IOU Amount	Fee ?	Amount Received	Pay To	Status	Date Paid	Actions
Avery Alda	$41.63			Liz Montana	Unpaid	mm/dd/yyyy	Note to Self | Nudge
Avery Alda	$97.13			Pat Smith	Unpaid	mm/dd/yyyy	Note to Self | Nudge
Total	$138.76						

See the math

12 px Arial Bold #FE0000

Participant	Expense	Already Paid ?	Share Per Person ?	Situation
Avery Alda	Winery Rental	$0.00	$138.75	$138.75 Underpaid
Liz Montana (Payer)	Winery Rental	$222.00	$138.75	$82.25 Overpaid
Mark Lennon	Winery Rental	$0.00	$138.75	$138.75 Underpaid
Pat Smith (Organizer, Payer)	Winery Rental	$222.00	$138.75	$82.25 Overpaid

14 px

10 px

Save

10 px

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Track Event

Track Event | View Event

You can update a participant's payment status below for offline payments, send them a reminder "nudge" email (up to a maximum of 2 nudges for each participant), or add a note to yourself.

When a participant makes an online payment, we automatically update the payment status.

Event Name	See the Math Wireframe
Event Date	11/05/2008

Payment Status

Participants	IOU Amount	Fee ?	Amount Received	Pay To	Status	Date Paid	Actions
Andrew Harris	$34.34			**Harry Smith**	Unpaid		Note to Self | Nudge
Dillon Sellars	$43.33			**Harry Smith**	Unpaid		Note to Self | Nudge
Jennifer Lee	$24.00			**Harry Smith**	Unpaid		Note to Self | Nudge

11 px Arial Regular, underline #336699

12 px Arial Regular, #333333

See the math

250 px | 130 px | 123 px | 146 px | 123 px

Participant	Expense	Paid Up Front ?	Share per Person ?	Status
Andrew Harris	Transpo	$0.00	$33.34	34.34 Underpaid
	Food	$24.00	$25.00	
	Total	**$24.00**	**$58.34**	
Dillon Sellars (Organizer)	Transpo	$60.00	$33.33	43.33 Underpaid
	Food	$0.00	$50.00	
	Lodging	$5.00	$25.00	
	Total	**$65.00**	**$108.33**	
Harry Smith (Payer)	**Total**	**$210.00**	**$108.33**	101.67 Overpaid
Jennifer Lee	**Total**	**$1.00**	**$25.00**	24.00 Underpaid

12 px Arial Bold, #333333

12 px Arial Regular #FE0000

Note: Starting January 1, 2009, participants who elect to receive payments online will be charged a fee.

Save

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Sign Off | Help

Events | People | Profile

View Event

Track Event | View Event

Click on a section to see more event details about shared expenses and participants.

Event Organizer	Dillon Sellars | sellardj@wellsfargo.com
Event Name	See the Math Wireframe
Event Date	11/05/2008

Who do I owe?

IOUs

Person	Amount Owed	Status	Actions
Harry Smith	$43.33	Unpaid	You need to pay Harry Smith offline. ?

See the math

Participants	Expense	Paid Up Front ?	Share per Person ?
Andrew Harris	Total	$24.00	$58.34
Dillon Sellars (Organizer)	Total	$65.00	$108.33
Harry Smith (Payer)	Total	$210.00	$108.33
Jennifer Lee	Total	$1.00	$25.00

whole bar clickable

Note: Starting January 1, 2009, participants who elect to receive payments online will be charged a fee.

What are the shared expenses?

Expense 1 $100.00

Expense 2 $100.00

Expense 3 $100.00

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Feedback? Email us your suggestions

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Track Event | View Event

Click on a section to see more event details about shared expenses and participants.

Event Organizer	Dillon Sellars | sellardj@wellsfargo.com
Event Name	See the Math Wireframe
Event Date	11/05/2008

Who do I owe?

IOUs

Person	Amount Owed	Status	Actions
Harry Smith	$43.33	Unpaid	You need to pay Harry Smith offline. ?

See the math

175 px | 175 px | 175 px

Participants 250 px	Expense	Paid Up Front ?	Share per Person ?
Andrew Harris	Transportation	$0.00	$33.34
	Food	$24.00	$25.00
	Total	**$24.00**	**$58.34**
Dillon Sellars (Organizer)	Transportation	$60.00	$33.33
	Food	$0.00	$50.00
	Lodging	$5.00	$25.00
	Total	**$65.00**	**$108.33**
Harry Smith (Payer)	**Total**	**$210.00**	**$108.33**
Jennifer Lee	**Total**	**$1.00**	**$25.00**

Note: Starting January 1, 2009, participants who elect to receive payments online will be charged a fee.

What are the shared expenses?

- Expense 1 $100.00
- Expense 2 $100.00
- Expense 3 $100.00

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SettleUp

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Events | People | Profile

30 px

People

12 px

Add a New Person | Add a New Group | Manage Existing Groups

* See "SM_DropDown_Specs.gif" for Specs on alpha selector.

A - E | F - J | K - N | O - R | S - W | X - Z

Select	Name	E-mail	Phone	Groups
	Alum [edit]			
	Avery Alda [edit]	aalda@yahoo.com	415 - 222 - 4949	Alum
	Band [edit]			
	Barbara Berkeley [edit]	barb_berk@hotmail.com	510 - 123 - 4567	Alum, Band
	Catherine Chantecaille [edit]	cat.chantecaille@gmail.com	925 - 333 - 4444	Alum
	Devon Dailey [edit]	devon.daily@gmail.com	710 - 987 - 6543	
	Alejandro Flores [edit]	ajflores@comcast.net	510 - 222 -4567	Band
	Liz Montana [edit]	liz@montanas.com	510 - 607 - 0331	Band
	Work [edit]			

75% Arial, Regular, Underline
336699

30 px

75% Arial, Regular,
CCCCCC

72 px

205 px | 230 px | 155 px | 216 px

Remove

768

WELLS FARGO

SettleUp

Sign Off | Help

Events | People | Profile

People

Add a New Person | Add a New Group | Manage Existing Groups

A - E | F - J | K - N | O - R | S - W | X - Z

Select	Name
☐	Alum [edit]
☐	Avery Alda [edit]
☐	Band [edit]
☐	Barbara Berkeley [
☐	Catherine Chanteca
☐	Devon Dailey [edit]
☐	Alejandro Flores [e
☐	Liz Montana [edit]
☐	Work [edit]

Remove

Edit Contact

This contact will no longer have access to previously sent IOUs if their e-mail is changed.
If this person has unpaid IOUs, you may want to resend the IOUs by givng them a nudge.

First Name Avery

Last Name (optional) Alda

E-mail aalda@yahoo.com

Phone (optional) (415) 222 - 4949

Add to the Following Groups (optional)

- ☐ Alum
- ☐ Band
- ☐ Work

Cancel | Save

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Set Your Preferences

Please provide your email, phone, and account information. The account you select will be used to receive money from event participants.

First Name: Dillon

25 px

Last Name: Sellars

Email: sellardj@wellsfargo.com

Phone (Optional): (310) - 123 - 4567

Account: MY CHECKING XXX-XXX8300(Avail. balance = $10,035.20)

(If you are paid online by someone, money will be deposited into this account.)

NOTE: If you change your email address, you will no longer be able to view (via your Home Page) any previous events on which you were a participant, unless you contact the Organizer of that event and request that they also change your email address in their Contacts list.

Cancel SettleUp Service

Save

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