Transaction Search

1. If you need to search for a transaction, select Transactions from the Expenses drop down list on the Works home screen.

2. From the Transaction Review page, click on the All tab. This will show transactions made within the last 30 days.

3. Note that Works only shows 10 transactions at a time. To scroll through multiple pages of transactions, click the arrows at the bottom right of the screen.
4. You can also click on any column header and the search will sort by that selection. Clicking a second time on the column header will result in a reverse sort.

5. If you are looking for a particular transaction and know the document number, vendor name or cardholder name, you can search by entering in information in the blank fields above those column headers.

6. By using the Advanced Filter on the left side of the screen, you can narrow down the search down by filters such as date or amount range.

7. Once you have made your filter selections, click the Search button at the bottom of the screen.