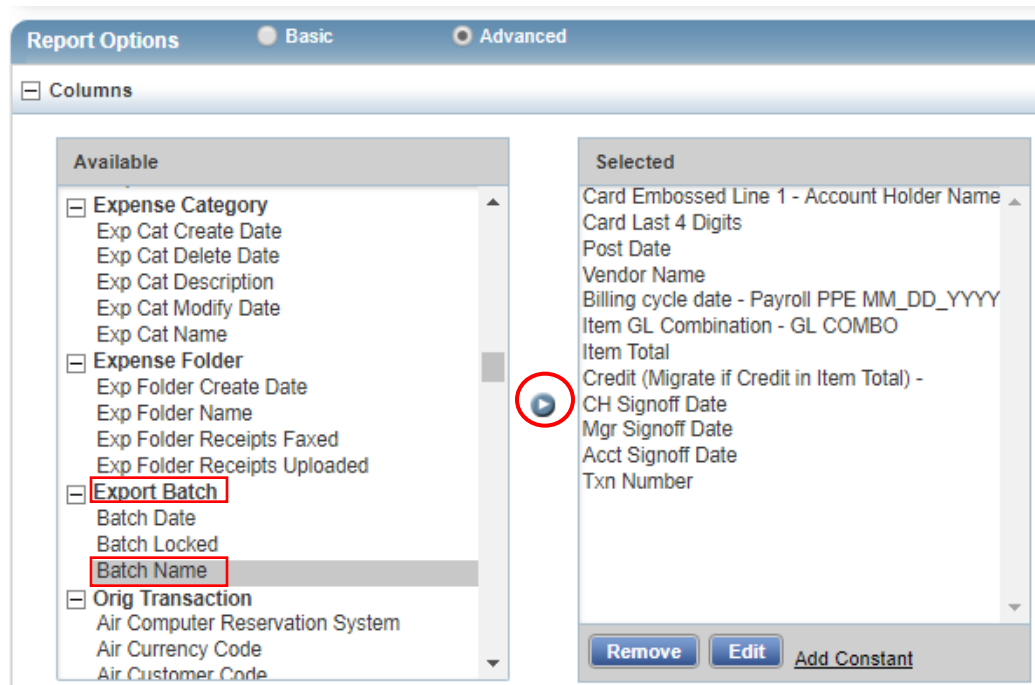


WORKS REPORTING

Transactions That Have Hit Your Budget

1. Login to WORKS and go to Reports > Create
2. Category = Spend
Template = Choose from all available templates
Template Name = Great Plains Report Test 1
3. Under Report Options, in the Available box, scroll down to the **Export Batch** heading
4. Click on Batch Name, then click on the blue arrow to add this to your Selected section



5. Under Filters, update your post date by clicking on the calendar icon and input your date range
6. Under Output Format, ensure that Excel and Full Details are checked
7. Scroll down and click on Submit Report
8. When your report is ready, click on XLS to view your report in excel. Column M contains the batch name
 - No batch name = transaction has not hit your budget
 - Batch name is just a PC number ex: PC000179 = transaction is currently in a batch and will hit your budget soon
 - Batch name is PC number and date ex: PC000179 06102019 = transaction has hit your budget