How to Change the Date Parameters in Works

Date parameters in the Transactions section default to the past 30 days. The following steps show how to adjust those dates for the previous cycle.

1. In the Expenses > Transactions section, to the left of the Pending Sign Off tab, there are two right pointing arrows. Click on those.

2. Now you will see a list of filters with Date at the top. The date range can be adjusted by clicking on the calendar icon. (You may need to click the + next to the word “Date” to display the icon.)

3. A pop-up window will open. To see transactions for the most recently completed cycle, click the radial button next to Previous Cycle and then click OK.
4. To apply the date selection to the transactions you see on the screen, click on **Search** at the bottom left of the **Advanced Filter** menu.

5. These steps can be modified to search for a specified number of days, a particular time frame (using custom), and several other options located in the window from Step 3.