Plant suggested template for WORKS accountholder:
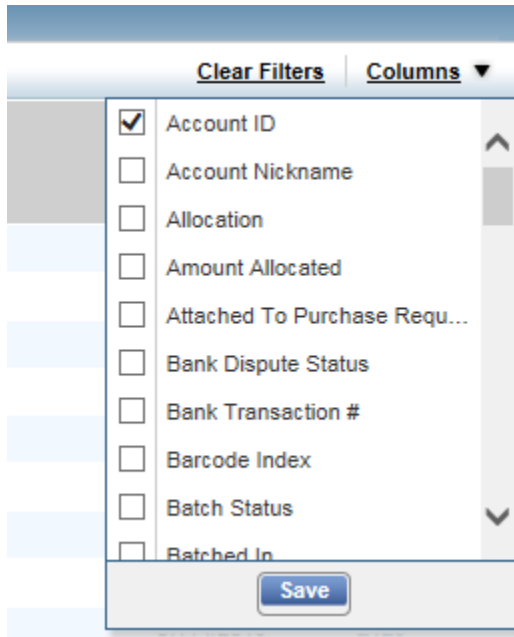

At the columns tab on right, check mark the following:

Account ID
Date purchased
Flagged
Primary accountholder
Purchase Amount
Reference
Sign Off
Uploaded Receipt
Vendor

Unclick all others

Suggested column arrangement: slide to move and click on column title to sort

Transactions - Accountholder											
>> Pending Sign Off	Signed Off	Flagged	All							Clear Filters	Columns ▼
	Document ▲	Uploaded Receipt	Vendor	Purchase Amount	Primary Accountholder	Sign Off	Flagged	Reference	Account ID	Date Purchased