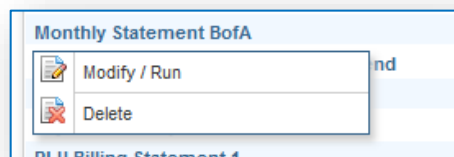
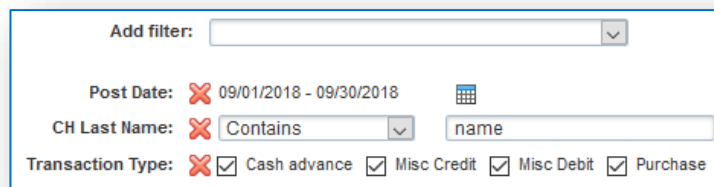


Instructions for Creating and Printing a Monthly Statement in Works

1. From the Home page, go to **Reports > Template Library**.
2. In the 'Shared' section near the bottom, click on the template name **Monthly Statement BofA**, and choose **Modify/Run**.
 - o If you don't see it you may have to change your 'Show 10 per page' to 'Show 25 per page' at the bottom.



3. Scroll past the three big boxes to the Filters section. You will see three **X**'s.
4. In the filter marked **CH Last Name**, change the word 'name' to your last name (or the last name you need the report/statement for).
5. In the filter **Post Date**, verify that it is showing the month that you are requesting. It is already set to run the previous month, but you can change this to another month if you need to by clicking on the calendar icon.



6. Scroll to the bottom and click on **Submit Report**.

Note:

- You have the ability to change any item that you need to get the desired results (i.e. get the report output in Excel format).
- You can save this template to your own template library so that it already has your name inserted for running it in the future.