



YOUR ELECTRONIC FILING SYSTEM

When tax times rolls around, are you searching for receipts? Did you buy the one-year extended warranty with your new smart phone? Do you travel for business but hate carrying around all those slips of paper?

Dakota West online account access allows you to attach images to any of your transactions to help you put your fingers on those loose pieces of paper that tend to get misplaced easier than they get filed. Use your online account access to save your important documents for you.

SCAN OR SNAP

If you're using your desktop computer, simply scan receipts, warranties, and other loose documents, and be sure to save them as a picture file type, such as a JPG or a PNG file. Find the transaction in your account history and click on the drop-down arrow on the far right. When the transaction details expand, click on the paper clip icon to attach the file from your computer.

14 MONTHS

You can use the filter feature in your account history to search for transactions as far back as the past fourteen months, so if you are accessing attachments for tax purposes, don't wait until April 14th – be sure to access the images you need during the early months of the year.

From your smart phone, click on the three dots on the transaction and simply take a picture from your photos or use your camera to take a picture directly to your transaction. It's that easy!

The composite image illustrates the steps to attach an image to a transaction. On the left, a Windows File Explorer window shows a folder named 'Website Documents' containing various image files (IMG_4560 through IMG_4540). The file 'IMG_4553' is selected. In the center, a screenshot of a mobile banking app shows a transaction for 'Deposit WEB TRANSFER FROM (...8134) TO (...0100)' for \$1,600.00 on 04-24-2020. A paperclip icon is highlighted in a red box. On the right, a screenshot of the app's attachment menu is shown, with options: 'Take a Photo', 'Choose from Photo Library', and 'Cancel'. The 'Attach Image to this Transaction' option is selected.