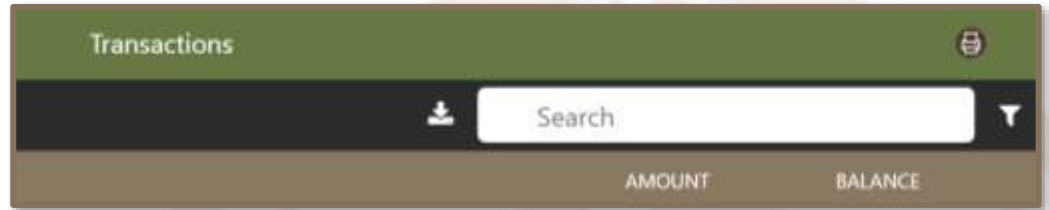# DOWNLOADING DATA

## HOW DO I DOWNLOAD MY TRANSACTION HISTORY?

If you've ever wanted a statement more frequently than just once a month, or if you want to prepare a report using your transaction data, you may be surprised to know you can do this right now in your online account access.

To begin a download of your transaction history, simply select the account you want to download, and click on the down-arrow icon next to the search bar on your account landing page. Select the account, and the range of dates to download and click next to download the file to your computer.

WHAT'S COMMA DELIMITED?

When selecting the file type, the only option you may see is Comma Delimited (CSV). These data files are compatible with most spreadsheet products, including Microsoft Excel and Google Sheets. The file may even default to the spreadsheet platform on your computer. Simply open the data and use the same features you would use for any other information, such as sorting, moving columns, formatting content, or saving multiple downloads into a single file for easy access.
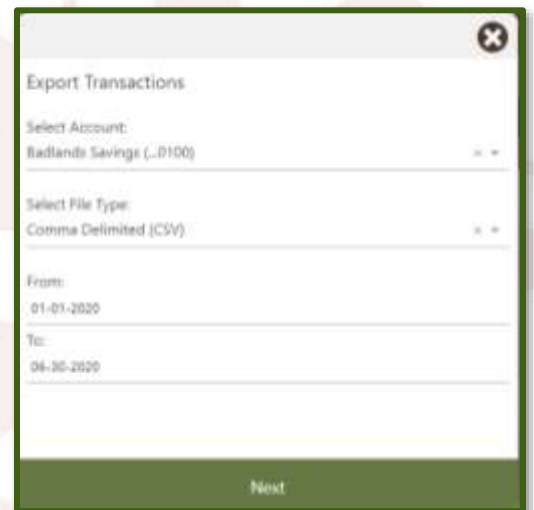
WHEN WOULD I USE THIS FEATURE?

There are a variety of reasons our members utilize regular downloads. In addition to more frequent account updates, this is an excellent way to track transactions placed on your credit card account. You can also sort the data and track checks by number, either chronologically as they clear your account or numerically. Perhaps you want to review a history of your loan payments, or chart the interest paid on your CDs.

Moving data into a spreadsheet also allows you to use features such as graphs and formulas, giving you the ability to track your accounts versus your budget, organize your expenses for tax purposes, or track your business spending.

Please note, this service is only available within the desktop/laptop browser platform and is not available through the mobile app.

ADVANCED BOOKKEEPING SOFTWARE OPTIONS

Many of our members use Quicken or QuickBooks for the personal or business record keeping. Comma Delimited files do not integrate with these softwares; however, it is possible to download your data into a compatible format. This does require a custom set-up of your online account access by one of our business-trained staff members. To learn more about Quicken or QuickBooks access, visit the Business Checking page of our website to discover more about the Smart Web App. To request this access, please email us at dwcu@dakotawestcu.org.