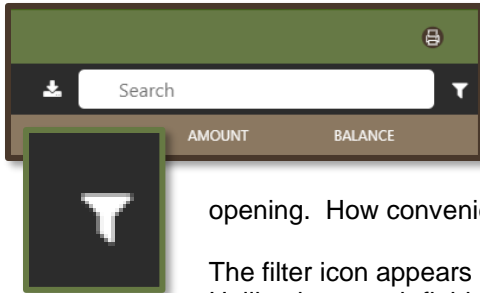


FILTERING YOUR ACCOUNT DETAILS



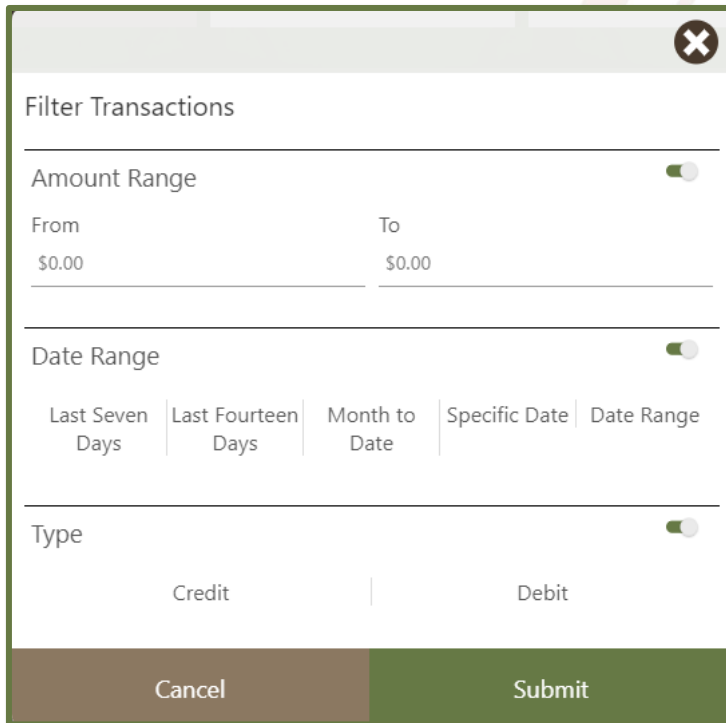
Grow WEST



YOUR ONLINE FUNNEL

Filtering your account transactions allows you to narrow down your view of your account history, much like using a funnel to pour liquid into a jar opening. How convenient that the filtering icon is a funnel.

The filter icon appears next to the Search field on your Accounts screen. Unlike the search field, filtering may remain in place every time you log on until you update your filtering preferences.



CREATE THE FILTERED VIEW FOR YOU

Filtering allows you to view select transactions within your transaction history. You can turn on filtering within each account individually to set up the view that best fits each account type. When you click on the funnel icon, click on each toggle switch to activate a specific filter.

Filtering Categories

- Range of dollar amounts
- Span of dates
- Type of transaction

You may use multiple filter categories, and you can turn them off as easily as you activate each filter just by clicking on each toggle.

For example, on your loan you only want to see the regular payments you

make each month, but not any extra payments you make. Set the Amount Range filter so the From and To amounts are the same as your monthly payment.

Perhaps you only want to see your debit card transactions for the current month to be sure you are meeting your [Kasasa Cash Back® account qualifications](#) – just set the Date Range filter for Month to Date.

Unlike the [Account Reporting](#) feature, Filtering is available on the Dakota West mobile app, too. Using Filtering gives you a closer look at your transaction history in a way that you can custom tailor to fit your viewing needs.

