

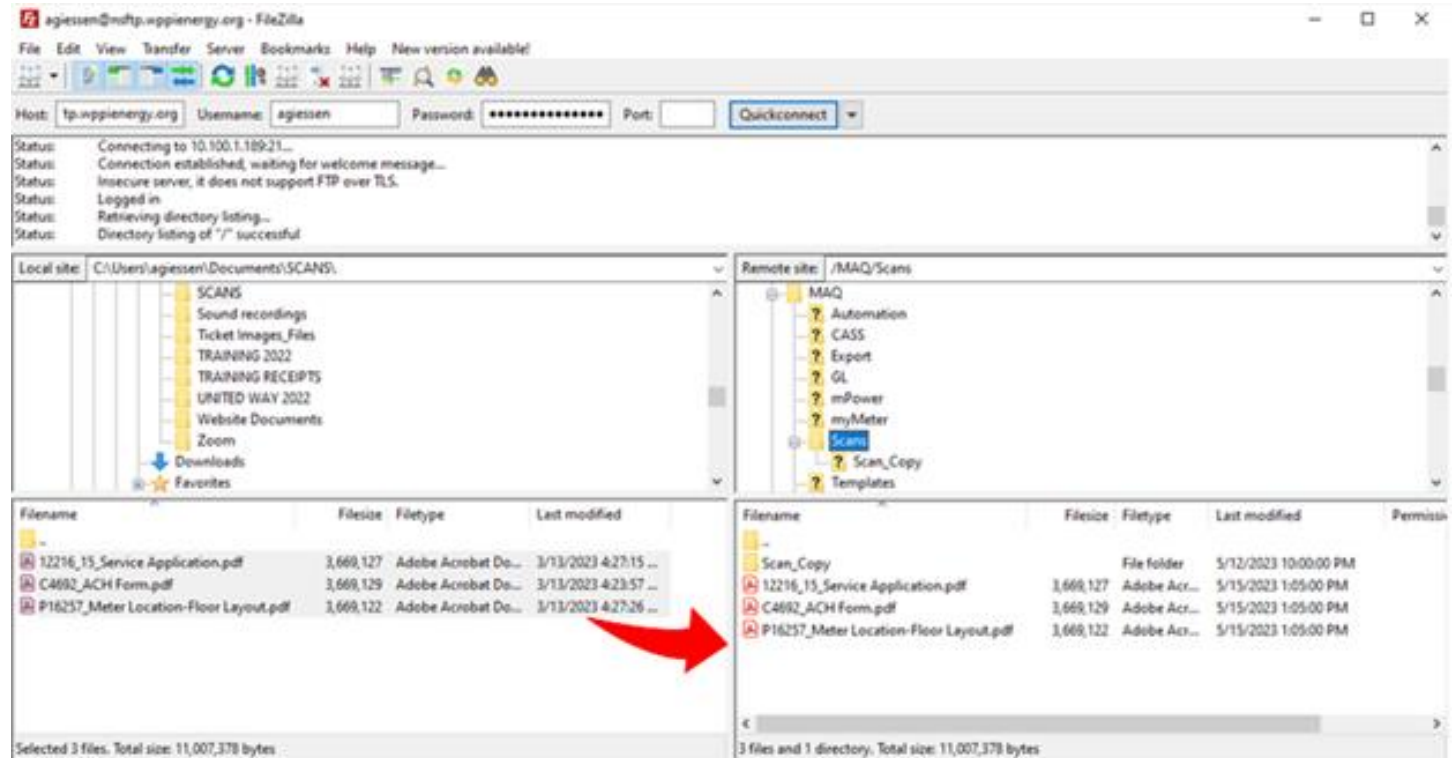
Transfer Scanned Documents to the ftp Scans Folder

From the **Local Site**, select the documents to transfer to the Remote Site.

Use the **Drag and Drop** method to transfer the files from the Local folder to the ftp Scans folder on the right.

The scanned documents are copied to the ftp folder.

All documents in the Scans folder on the ftp will be 'picked up' and saved to their respective accounts in NorthStar during the nightly automated process.



Newly saved documents will be available for viewing the following day in NorthStar by navigating to the account and opening the eDocs table.

In the example shown, the ACH Form was attached at the customer level.

NOTE: WPPI support staff is alerted via an internal WSC ticket to any documents that do not load during the automated process. Support staff will review and resolve the issue(s) and contact the member with any questions.

Account Gateway > E-Docs

The screenshot displays the 'Account Management View (BROWSE) ACTIVE' interface. At the top, there is a toolbar with various icons, including a red box around a document icon. Below the toolbar, the 'Quick Info' section is divided into 'Account Details' and 'Service Address'. The 'Account Info' section shows: Account: 1625 10, Active: , Name: JIMMY BUFFETT, Customer: 4692. The 'Service Address' section shows: House #: 500, Mod: S, Street: PARADISE LN, Region: (empty), City: MARGARITAVILLE, Home: 608-313-5151, Bus: (empty). A 'Ready' status indicator is present. Below this, there are tabs for 'Service Summary (BROWSE)' and 'E-Doc (BROWSE)'. The 'eDocs(v2.0)' section displays account information: JIMMY BUFFETT, Account: 1625-10, 500 PARADISE LN, Customer: 4692, and the NorthStar logo. A table titled 'Account Documents (10111-14) SHEENA YOUNG @ 2395 MAIN ST 1' contains one document entry: 'C4692_ACH Form.pdf' with a description of a downward arrow, notes, type 'pdf', date created 'Apr 14, 2022 08:53', and size '2,329,279'. A red arrow points to the document icon in the first row of the table. At the bottom, it shows 'Approximate Free Space: 163,123,864 Kbytes'.