



How to Upload Your Bank Statements to ZenOperative

Please be sure to read over the whole
document before taking action.

Uploading Bank Statements to ZenOperative



Once a month you will receive an email from ZenOperative that looks like the following image:



[303-974-6997](tel:303-974-6997) · support@zenoperative.com

Add Your Monthly Statement: Some Bank (Bank)

Please add your monthly statement for Some Bank (Bank).

Account Last 4 Digits: 1234

[Add Statement Now »](#)

[Already Sent In Statement »](#)

[This account is no longer active »](#)

Please do not reply to this email. Replies will not be read by a human. Thank you!

Uploading Bank Statements to ZenOperative



Here are some details about the email.



[303-974-6997](tel:303-974-6997) · support@zenoperative.com

This will be the name of your bank and the type of account

Add Your Monthly Statement: **Some Bank (Bank)**

Please add your monthly statement for Some Bank (Bank).

Account Last 4 Digits: 1234

[Add Statement Now »](#)

[Already Sent In Statement »](#)

[This account is no longer active »](#)

The last 4 digits of the account

Please do not reply to this email. Replies will not be read by a human. Thank you!

Uploading Bank Statements to ZenOperative



There are 3 actions that you can take:

Please add your monthly statement for Some Bank (Bank).

Account Last 4 Digits: 1234

[Add Statement Now »](#)

[Already Sent In Statement »](#)

[This account is no longer active »](#)

This is the preferred method. More instructions will follow

If you click this link it will automatically tell ZenOperative that you have already sent in the bank statement via your BK email

If you click this link it will automatically tell ZenOperative that this bank account is no longer active.

Uploading Bank Statements to ZenOperative



1. If you click on "Add Statement Now" it will take you to a web page where you will be able to upload your bank statement

Please add your monthly statement for Some Bank (Bank).

Account Last 4 Digits: 1234

[Add Statement Now »](#)

[Already Sent In Statement »](#)

[This account is no longer active »](#)

2. Once the web page loads it will look like this:

[Feedback Required](#) [Open A Ticket](#) [Procedures](#) [News](#) [Evernote](#) [Bill.com](#)

ACCOUNT OPTIONS

[Add Statement Now »](#)

[Already Sent In Statement »](#)

[This account is no longer active »](#)

Upload Statement For Account Some Bank (Bank — 1234) — September 2012

Some Bank (Bank) — 1234

Account Statement September 2012

No file chosen

Save Some Bank Statement September 2012

Uploading Bank Statements to ZenOperative



Be sure to have your bank statement downloaded from your bank in PDF format.

3. Click on "Choose File"

Feedback Required | Open A Ticket | Procedures | News | Evernote | Bill.com

ACCOUNT OPTIONS

- [Add Statement Now »](#)
- [Already Sent In Statement »](#)
- [This account is no longer active »](#)

Upload Statement For Account Some Bank (Bank — 1234) — September 2012

Some Bank (Bank) — 1234

Account Statement September 2012

No file chosen

4. After clicking the "Choose File" button your file folder will open up. Choose the bank statement to upload.

Uploading Bank Statements to ZenOperative



5. After choosing the file you will see it here:

Some Bank (Bank) — 1234
Account Statement September 2012
 SomeBankAu...t2012.pdf

Save Some Bank Statement September 2012

6. Now you can click "Save Some Bank Statement..."

7. This whole process is completed when you see the "Thanks for updating your account" message

ACCOUNT OPTIONS
Add Statement Now »
Already Sent In Statement »
This account is no longer active »

Upload Statement For Account Some Bank (Bank — 1234) — September 2012

Thanks for updating your account.

Zen
Operative

The logo for Zen Operative features the word "Zen" in a grey sans-serif font above the word "Operative" in a larger grey sans-serif font. To the right of the text is a green icon consisting of four squares arranged in a 2x2 grid, with the top-right square missing.

The End!