## How to connect your bank feed with Xero



ADVALOREM

xero

## **CONNECTING VIA DESKTOP**

# **STEP**

In the Accounting menu, select Bank accounts.

Click Add Bank Account.

concarge concorr comes	Accounting Contacts				
Demo Company 1	Bank Accounts Reports			Vour last login: <u>2 hours pop</u> from United Kingdom Cold databa	
	Advanced Advanced Aged Populars Aged Populars Balance Sheet	Ancest	Welcome to Xero       Use the deableard logit an instant overview of her your business in backing.       Go shaad and set tup.       If West is reversion of the reals force (ESE)	Tate	
	Cash Summary Profit and Loss VAT Return	dashooand has a new look. All functionality is	of the same Learn about this change $\underline{G}$		
	Advanced Chart of accounts Prind and recode Pound assets Manual journals	al cash flow what you're making and spending	Introduces cound by you New solids location We Adverted particular 171 Oversitie 33,223 13		
			Olev 13.75 Mar. The uses. 27.56 2.5 pt 3.8 Apr. Pulaw		
			Next: Accept fast online payments Add 2 <sup>1</sup> My nov <sup>2</sup> butter to your involces so curiomers can pay you sharph. Add		



Bank Search   Add Bank Account: 🗙 🕂			~ - 0 ×
→ C		9,	e * 🛛 🛎 i
THE Company 1 - Dashboard Basiness Accessing Contacts			🧶 o 💠 👜 î
d Bank Accounts			
	Find account		
[	Q. cativest		
	and for a care, credit and in asymptotic provider		
	3 results in United Kingdom		
	Natifiest		

### Select from popular banks, or start typing your bank's name, then select from the list

\*If the name of your bank doesn't appear in the list, click the link in the message that appears. This means there are no feeds available for this bank, so you'll need to manually import bank statements into the account.





You'll be taken to your bank to log in, enter your online banking credentials and any multi-factor authentication required.





Select the accounts you want to share with Xero and complete the sharing steps before you are redirected back to Xero.







### SIEP

Confirm the date you'd like your transactions to start from. You can import up to 12 months worth of transactions.

			Your last login: 2 hours pop from United Kingdom Colt dashboard
	Excess Data Account     1       Excess Data Account     1 <t< td=""><td>Accessers Mathematics     I       Accessers II.     This moves     110       Advances II.     2:00333     1:171:00       Extendemain of the hardware (DD)     2:0333     4:48       Investings (SD)     6:98     6:39       States (DD)     5:8755-35     5:074:44</td><td></td></t<>	Accessers Mathematics     I       Accessers II.     This moves     110       Advances II.     2:00333     1:171:00       Extendemain of the hardware (DD)     2:0333     4:48       Investings (SD)     6:98     6:39       States (DD)     5:8755-35     5:074:44	
	2770 6Mar 13Mar 29Mar	Involces awed to you	
	Business Savings Account BH-00 00 BUNALI220	New seles invotce 2 Dialt invotes 1,180,80 16 Austrilia payment 14,228,87 8 Overfree 4,580,13	
	No transactions imported tread a tank internet to bit stated		
	Total cash in and out	Chiev 13-19 Mar This week 27 Mar 2 Apr 3-9 Apr Polare	
	Chiefer Desertion James Jones Patients March	Bills you need to pay New bill 1 Data bill 2020 13 Availing payment 4,19524	
contransiac/sanowearps/accountry/second	TOUT CALL CALL		*

Click Finish.

## How to connect your bank feed with Xero

## **CONNECTING VIA MOBILE**

xero

In the Accounting menu, select Bank accounts.

**STEP** 

Click Add Bank Account.









ADVALOREM

Select from popular banks, or start typing your bank's name, then select from the list

\*If the name of your bank doesn't appear in the list, click the link in the message that appears. This means there are no feeds available for this bank, so you'll need to manually import bank statements into the account.



You'll be taken to your bank to log in, enter your online banking credentials and any multi-factor authentication required.

#### Connect NatWest to Xero Xero partners with Tink to securely import your transactions. Tink creates a one-way connection

from your bank to Xero and is regulated & supervised by the FCA under the Temporary Permissions Regime. <u>Learn more</u>

#### Xero needs your approval to access:

Account detailsYour account name, number, and sort code

Your account balanceYour card number

Account transactions

Details of your transactions

• For security reasons, you will need to renew this approval every 90 days

Agree and log in to bank 亿 igo.xero.com

STEP

You will be securely transferred to your bank after you have authenticated.





### SIEP

Select the accounts you want to share with Xero and complete the sharing steps before you are redirected back to Xero.

personal or business banking						
Personal Banking						
Online / Mobile Banking						
Bankline / Commercial cards						
Bankline						
		ClearSpend	1			
AA	li secu	ure1.natwe	st.com	S		
<	>	Û	ш	G		



**STEP** 

Confirm the date you'd like your transactions to start from. You can import up to 12 months worth of transactions.

Click Finish.