

How to connect your bank feed with Xero

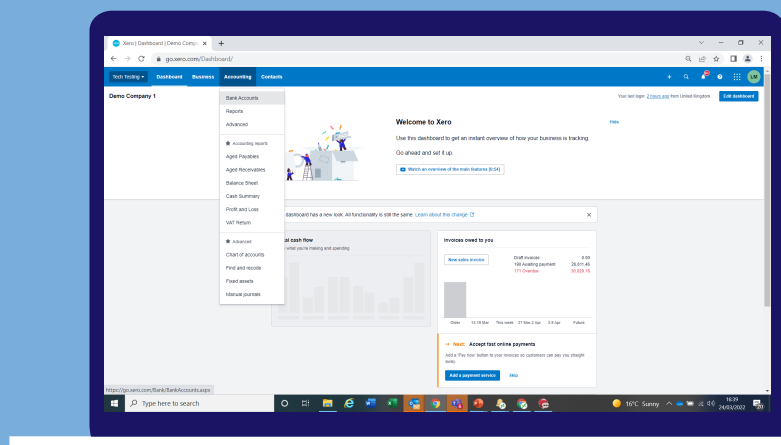


CONNECTING VIA DESKTOP

1 STEP

In the Accounting menu, select Bank accounts.

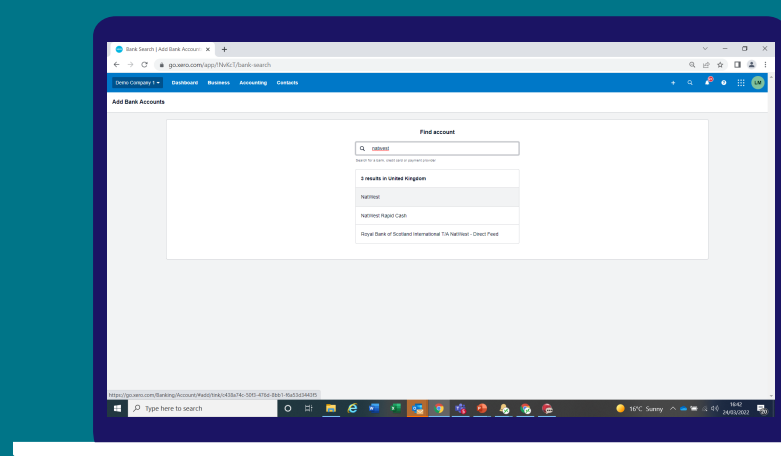
Click Add Bank Account.



2 STEP

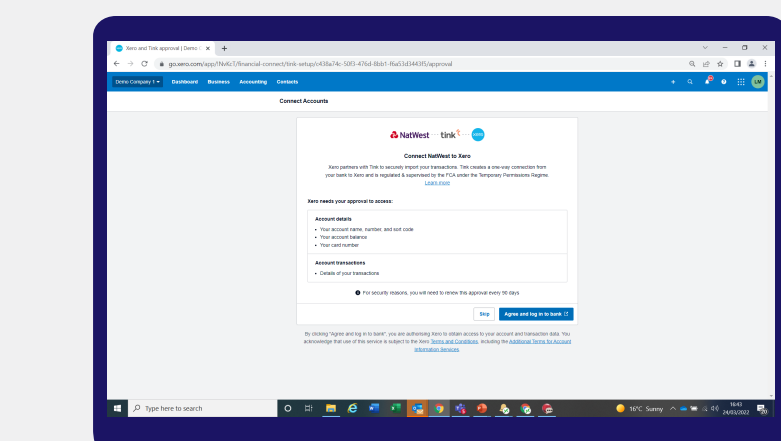
Select from popular banks, or start typing your bank's name, then select from the list

*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.



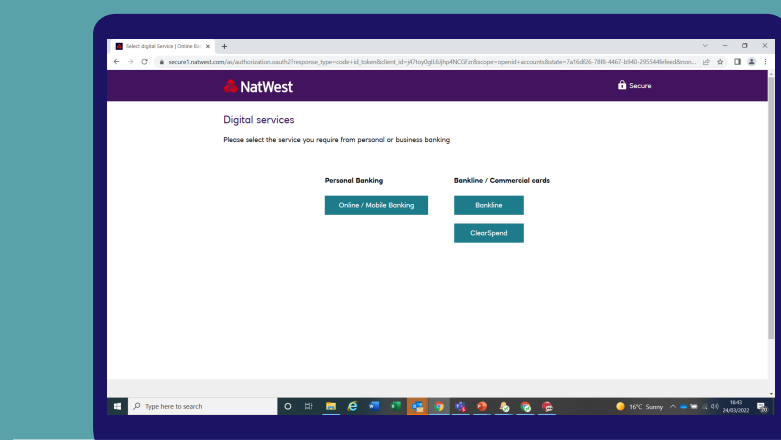
3 STEP

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



4 STEP

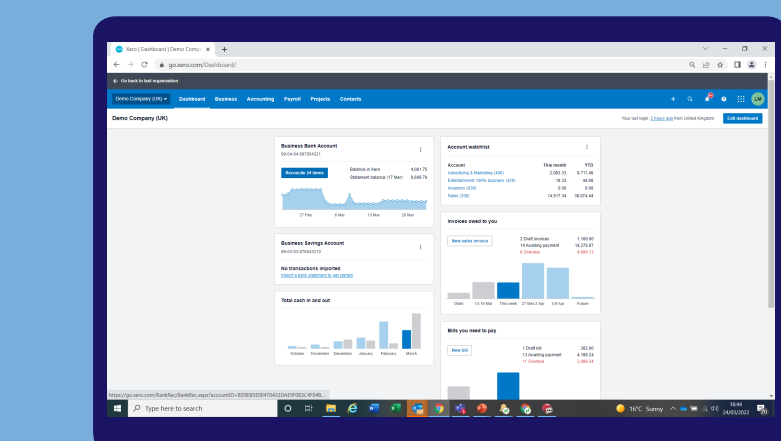
Select the accounts you want to share with Xero and complete the sharing steps before you are redirected back to Xero.



5 STEP

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

Click Finish.



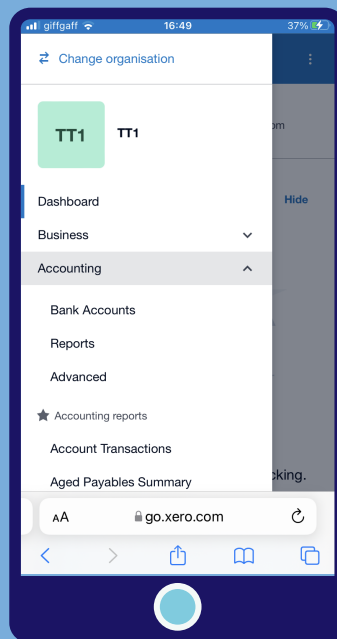
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CONNECTING VIA MOBILE

1 STEP

In the Accounting menu, select Bank accounts.

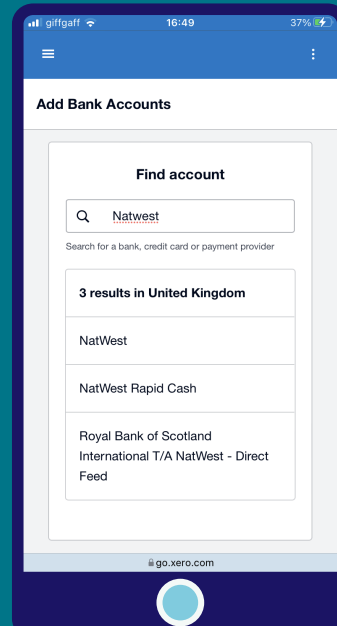
Click Add Bank Account.



2 STEP

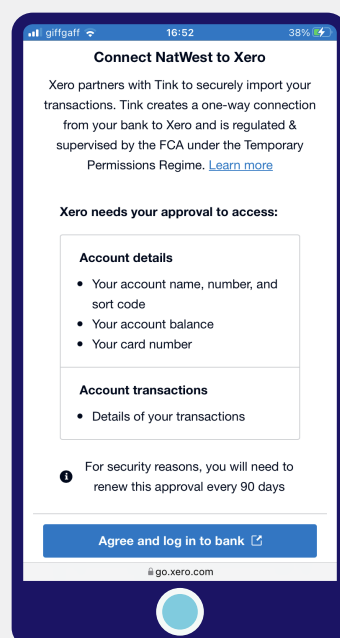
Select from popular banks, or start typing your bank's name, then select from the list

*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.



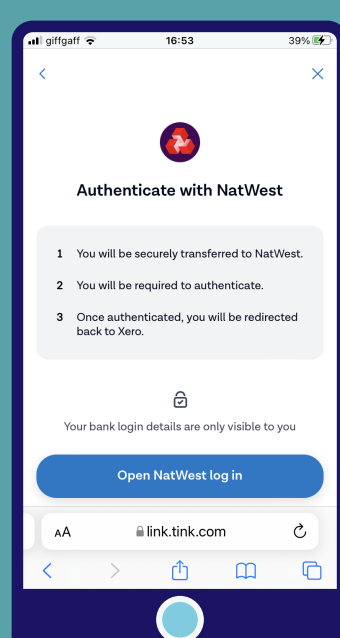
3 STEP

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



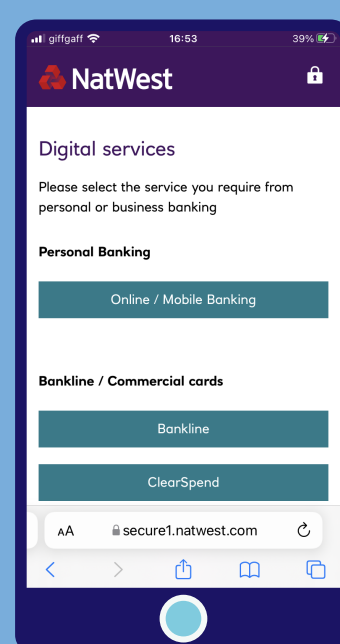
4 STEP

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



5 STEP

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



6 STEP

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

Click Finish.

