

How to import bank feeds – COMMBIZ

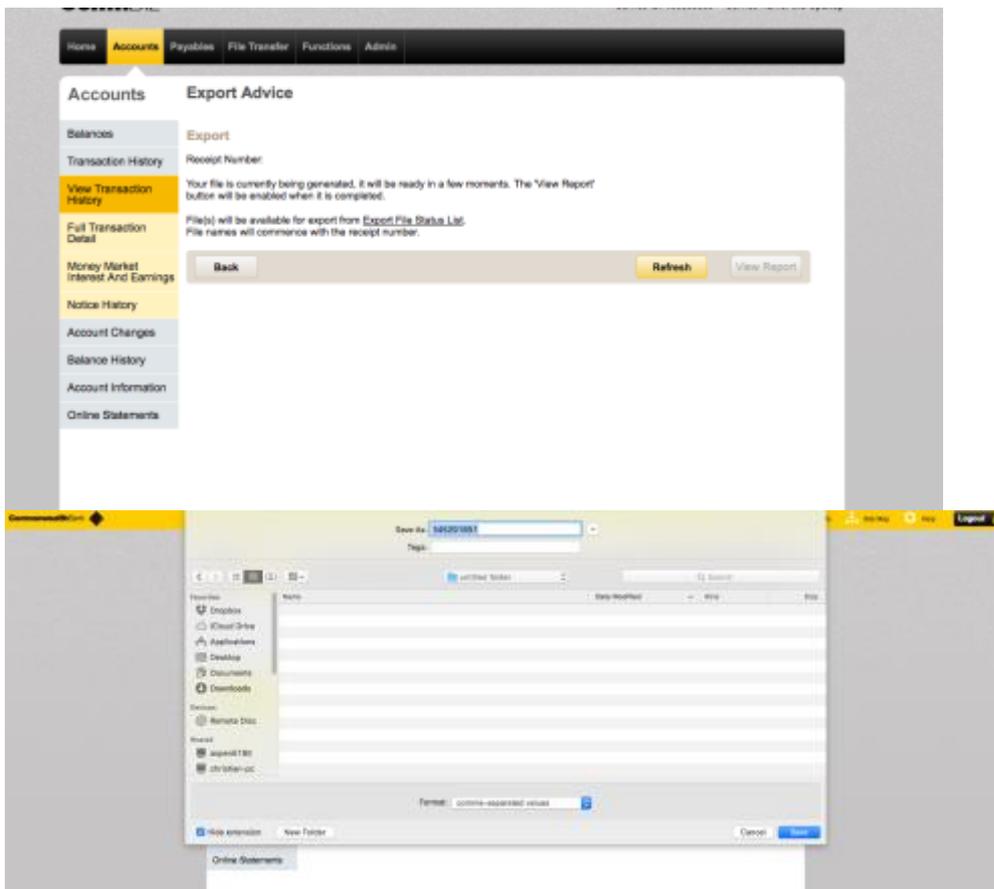
1. Click Bank Account Name from the List → Select the date range then search.

The screenshot shows the 'View Transaction History' interface in Commbiz. The 'Transaction search' section includes a 'Dates' filter with 'From' set to 23/06/2017 and 'To' set to 25/06/2017. A red circle highlights the 'SHOW' button. A blue arrow points from the text 'Start Date' to the 'From' date field.

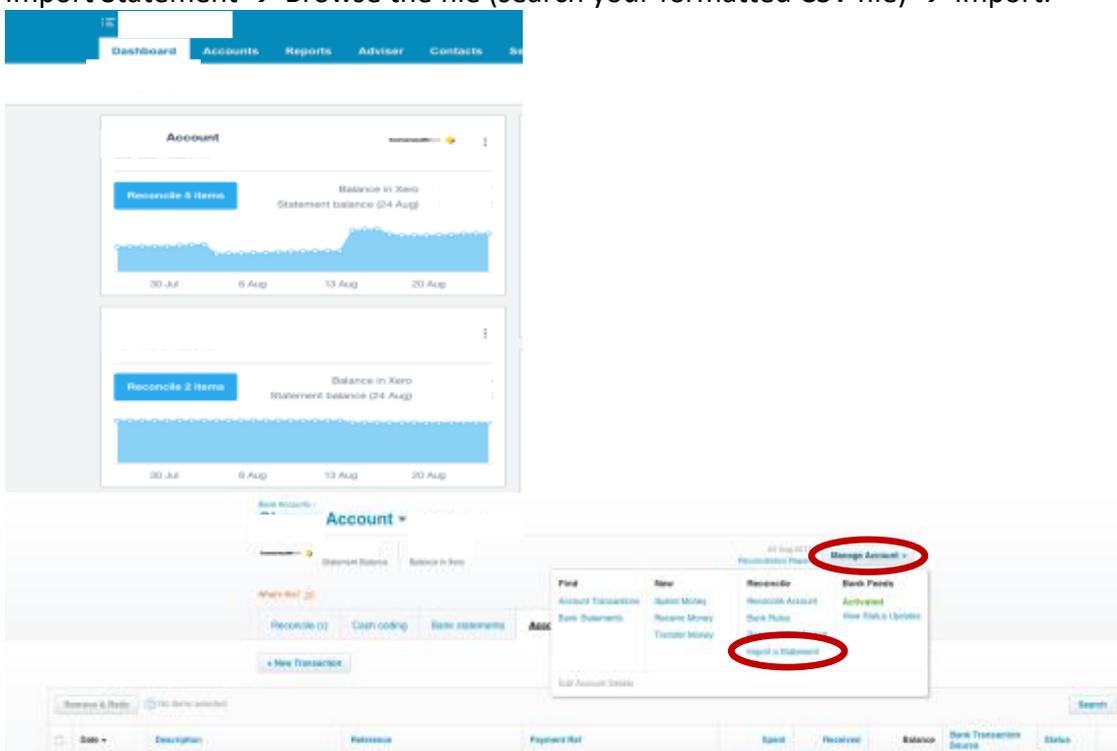
Start Date – Check Xero Bank account for last date exported file.

2. Select Export Format: CSV file → Click Export Transactions → Save File (Your Chosen Folder)

The screenshot shows the 'View Transaction History' page with a list of transactions. At the bottom, the 'Export format' is set to 'CSV' and the 'EXPORT TRANSACTIONS' button is highlighted with a red circle.



3. On Xero Dashboard look for the exported file Bank Account then select. Click Manage Account → Import Statement → Browse the file (search your formatted CSV file) → Import.



Bank Accounts > Account > **Import Bank Transactions**

Follow these steps to import your transactions

- In a new window, go to your bank web site.
- Download your bank statement. File type must be QFX, QIF or CSV. The most recent transaction imported was:

24 Aug 2017	Spent	Received
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- Upload the bank statement file here...

[Browse](#) No file selected

[Import](#) [Cancel](#)

File formats you can import

Format [Find out more](#)

QFX (recommended) [QFX help](#)

QIF [QIF help](#)

CSV [CSV help](#)

Download our CSV template to create your own bank statement file. Import a maximum of 1000 bank statement lines at a time.

*Before uploading the csv file, format it using the Downloaded Xero CSV template. Copy and Paste the information from your exported file, then Save the template.

All fields marked with an asterisk (*) are required.

Bank Accounts > Cheque Account > **Import Bank Transactions**

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24 Aug 2017	POSS 1240380 - AGN	38.50
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- Upload the bank statement file here...

[Browse](#) StatementImportTemplate.csv

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