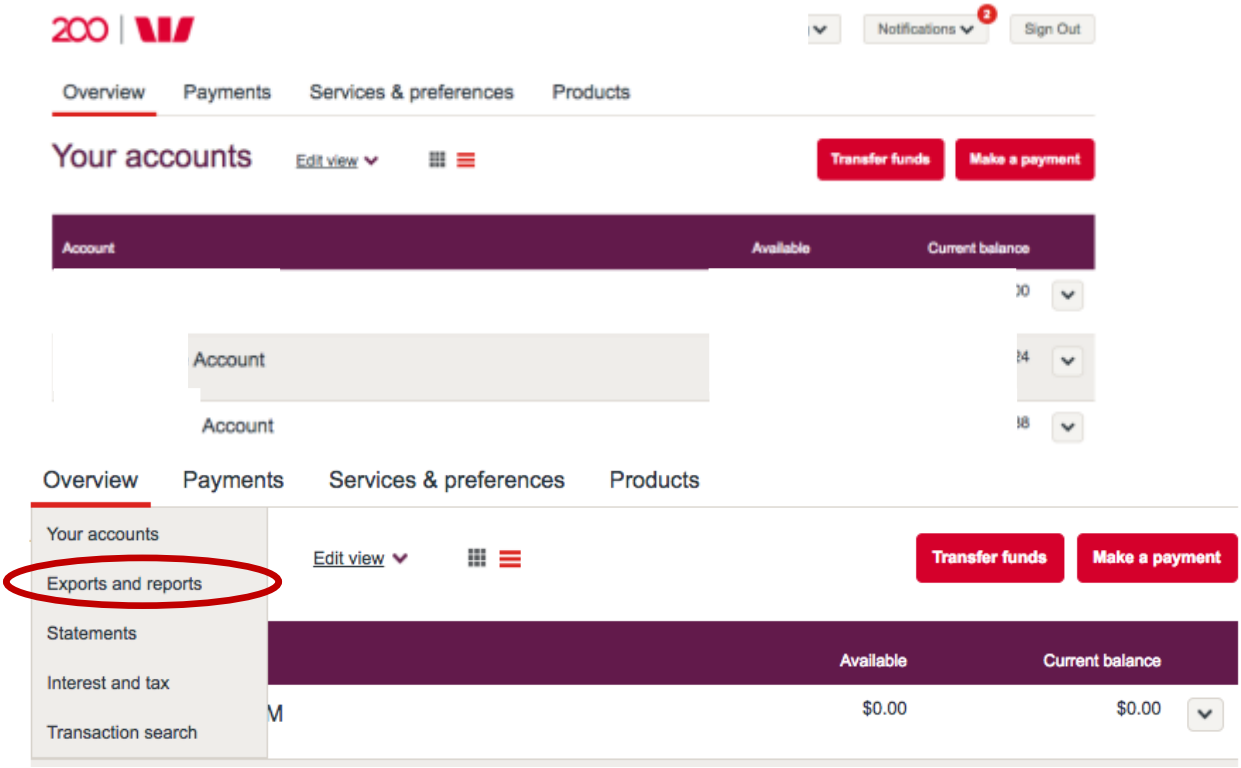
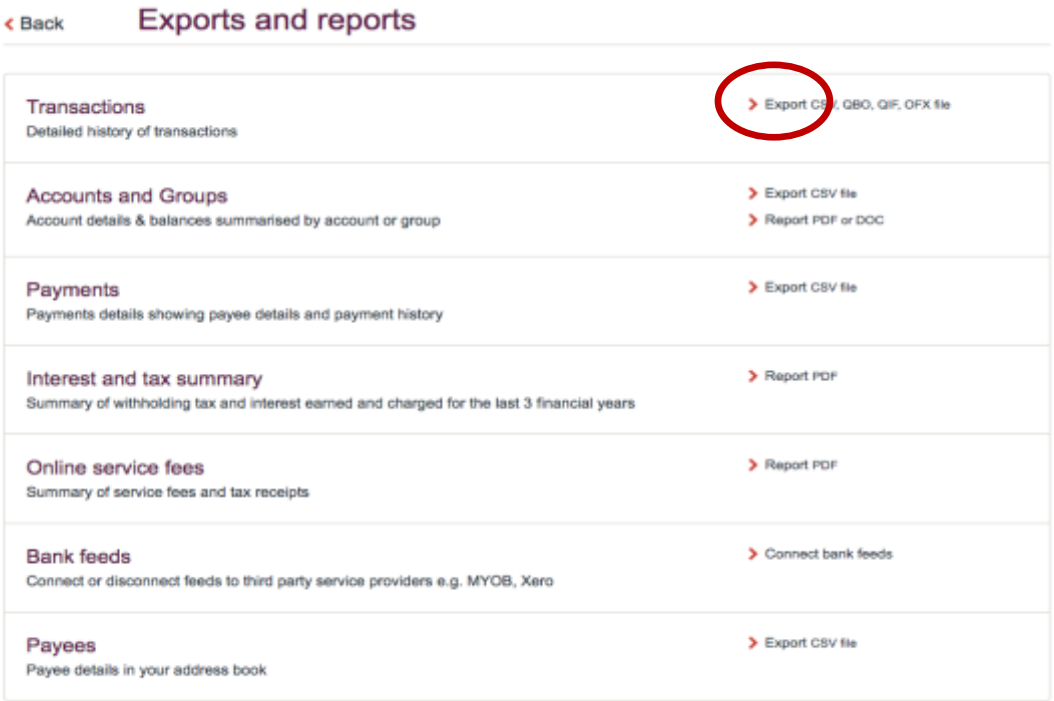
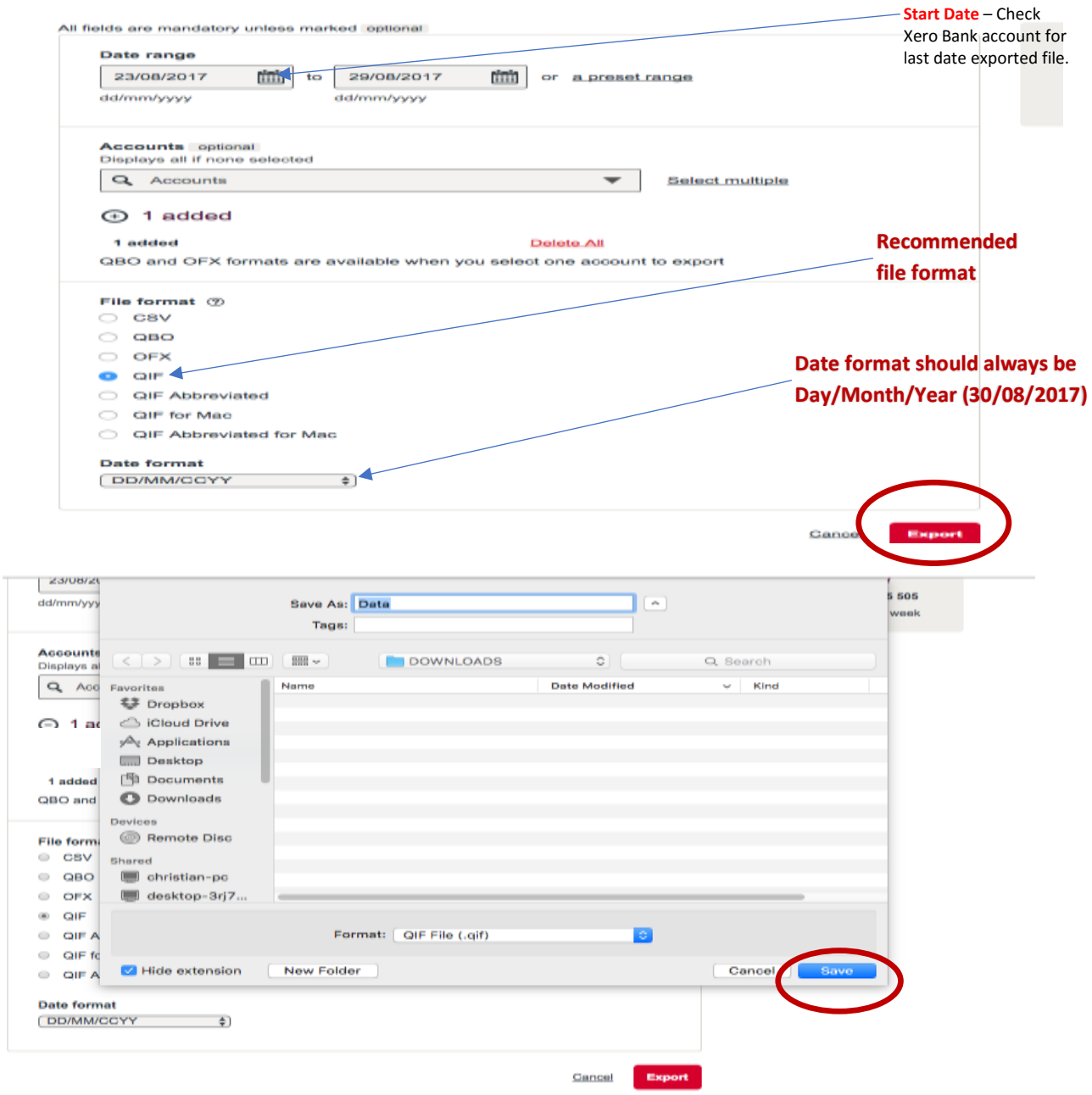
How to import bank feeds – WESTPAC

1. Under Overview → choose Exports and Reports →

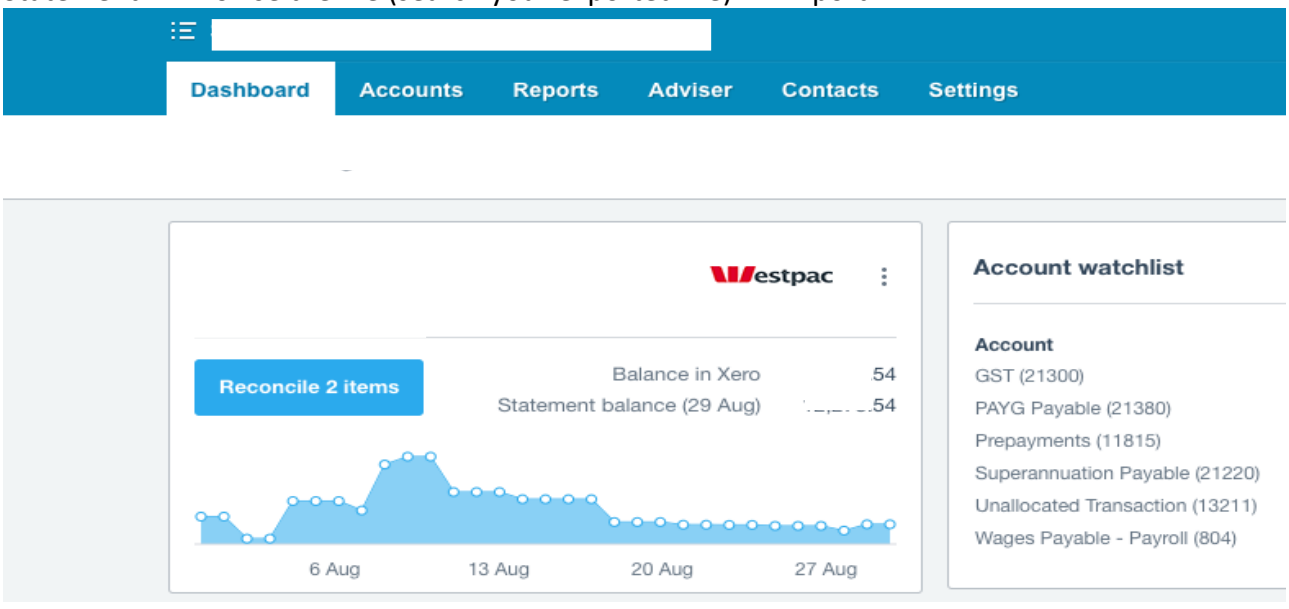


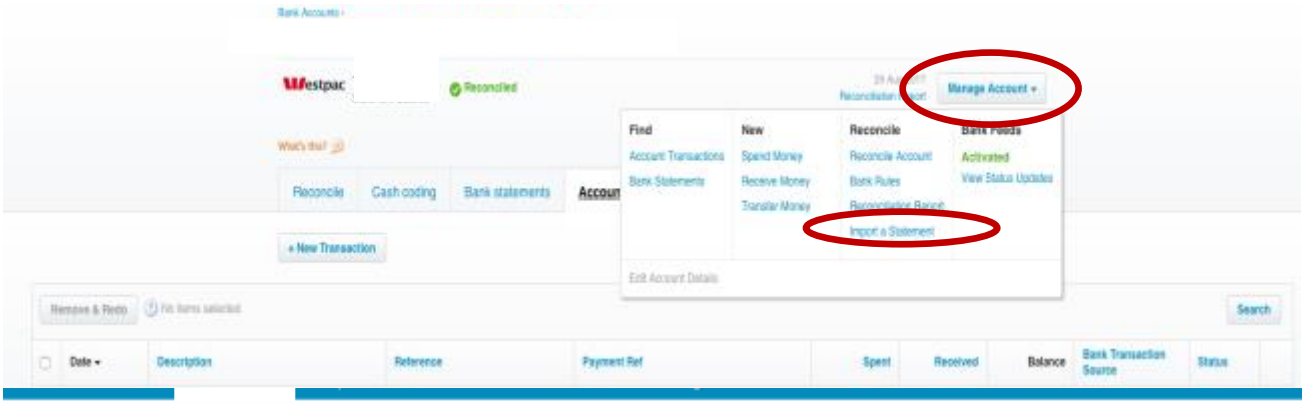
2. Transactions, Click Export → Select date range, bank account and file format then export → Save File (Your Chosen Folder)

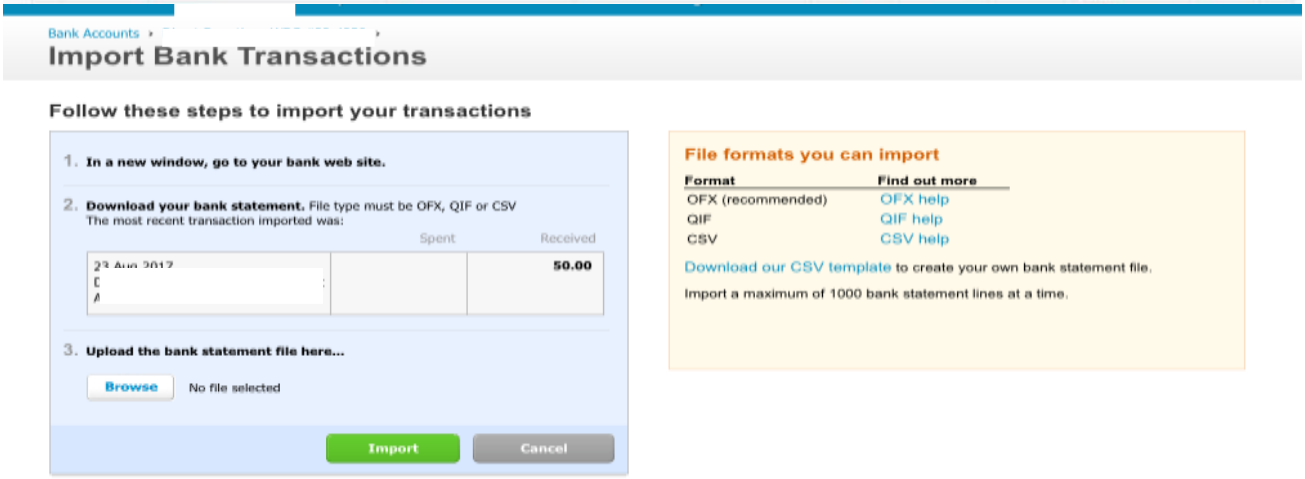


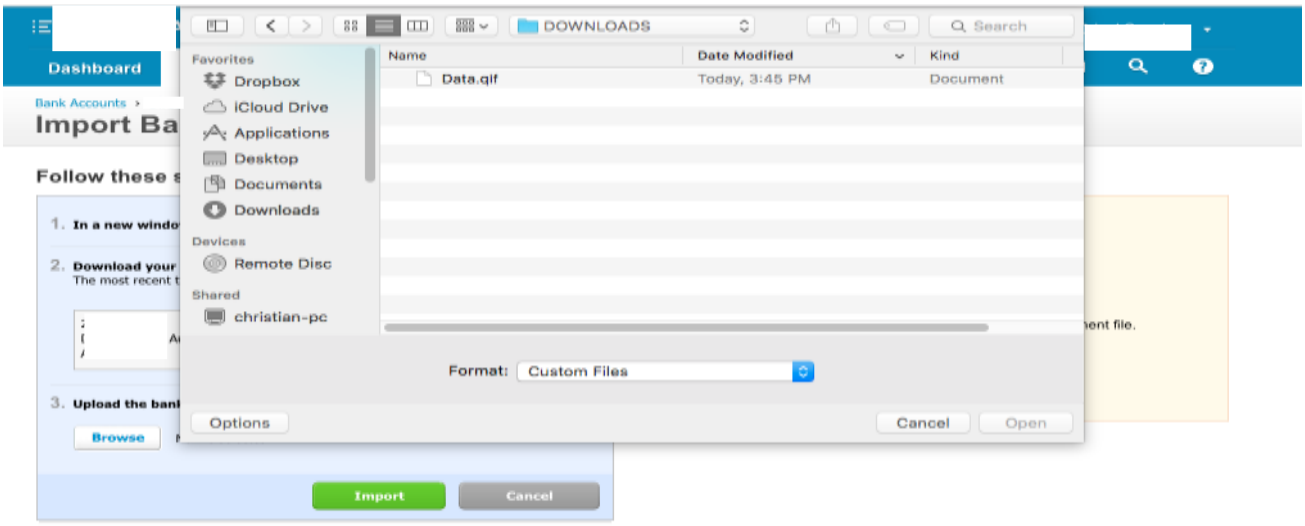


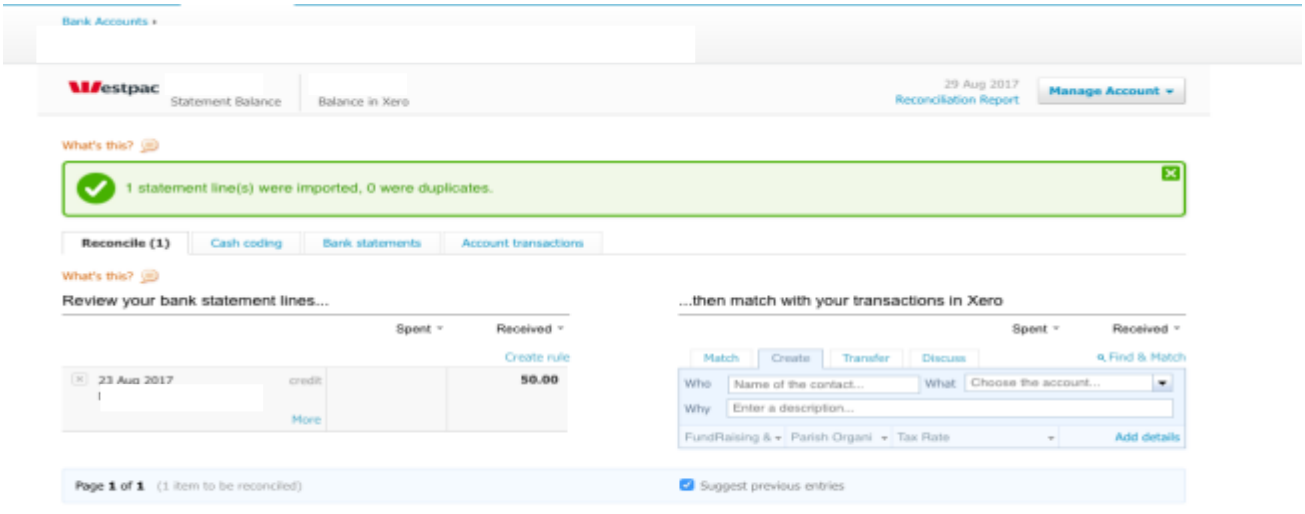
3. On Xero Dashboard look for the exported file Bank Account then select. Click Manage Account → Import Statement → Browse the file (search your exported file) → Import.




Westpac
Reconciled
Manage Account
Find
Account Transactions
Bank Statements
New
Spend Money
Receive Money
Transfer Money
Reconcile
Reconcile Account
Bank Rules
Import a Statement
Bank Feeds
Activated
View Status Updates
Reconcile
Cash coding
Bank statements
+ New Transaction
Search
Date
Description
Reference
Payment Ref
Spent
Received
Balance
Bank Transaction Source
Status


Bank Accounts
Import Bank Transactions
Follow these steps to import your transactions
1. In a new window, go to your bank web site.
2. Download your bank statement. File type must be OFX, QIF or CSV
The most recent transaction imported was:
Spent
Received
50.00
3. Upload the bank statement file here...
Browse
No file selected
Import
Cancel
File formats you can import
Format
Find out more
OFX (recommended)
OFX 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.


Dashboard
Bank Accounts
Import Ba
Follow these
1. In a new windo
2. Download your
3. Upload the bank
Browse
Import
Cancel
DOWNLOADS
Search
Favorites
Dropbox
iCloud Drive
Applications
Desktop
Documents
Downloads
Devices
Remote Disc
Shared
christian-pc
Name
Date Modified
Kind
Data.qif
Today, 3:45 PM
Document
Format: Custom Files
Options
Cancel
Open


Bank Accounts
Westpac
Statement Balance
Balance in Xero
29 Aug 2017
Reconciliation Report
Manage Account
What's this?
1 statement line(s) were imported, 0 were duplicates.
Reconcile (1)
Cash coding
Bank statements
Account transactions
What's this?
Review your bank statement lines...
Spent
Received
Create rule
23 Aug 2017
credit
50.00
More
...then match with your transactions in Xero
Spent
Received
Match
Create
Transfer
Discuss
Find & Match
Who
Name of the contact...
What
Choose the account...
Why
Enter a description...
Add details
Page 1 of 1
(1 item to be reconciled)
Suggest previous entries