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Uploading Bank Statement - OpenBooks

How do I upload a bank statement?

The quickest and easiest way to do this is to export your bank statement from Online Banking, then upload it and explain the transactions.

1. Export statement from online banking

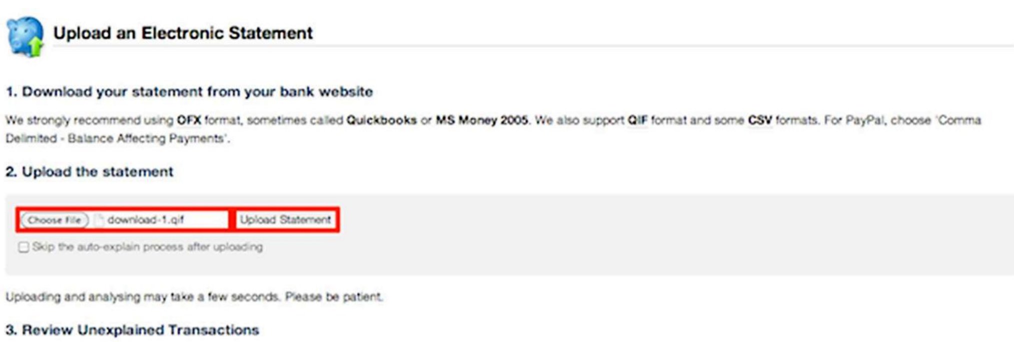
Firstly, you'll need to go into your online banking account and export and save your statement.

Information required

To know what format to export your data in, click on Banking, and then, on the left-hand menu, click on the bank account for which you're going to upload a statement, and click Upload Statement.

2. Import statement

Once you've exported your statement from your online banking system and saved it to your computer in the correct format, click Browse here, and find on your computer the file you've just saved. Click on it, then click Upload Statement.



Alternatively bank statements can be uploaded manually. See guide to explaining bank transactions.