

RESOURCE GUIDE

Connecting Your Bank to Xero

Get your everyday transactions flowing into Xero automatically — no manual entry needed.

TR ACCOUNTING SERVICES

Bookkeeping support built for local businesses — Karratha & the Pilbara

Once your bank account is connected to Xero, your everyday transactions flow in automatically each day — no downloading statements, no manual typing.

Here's how to set it up, whichever bank you're with. — **Thilini**

1 Before You Start

Make sure the account you want to connect already exists in Xero:

- 1 Log in to Xero and go to **Accounting > Bank Accounts**
- 2 If the account isn't listed, click **Add Bank Account**, search for your bank, and enter the account name and number

2 Connect the Feed

The general process is the same for most Australian banks:

- 1 Go to **Accounting > Bank Accounts**
- 2 Click the three dots (...) next to the account, then **Get Bank Feeds**
- 3 Choose your bank and follow the prompts to log in and authorise the connection
- 4 Confirm the account matches correctly in Xero
- 5 Allow 24–48 hours for your transactions to start appearing

HANDY TIP

A few banks ask you to start the connection from your own online banking instead of from Xero — usually under a section called "Bank Feeds," "Accounting Software," or similar. If you're not sure where to look, just let me know which bank you're with and I'll point you in the right direction.

3 If Your Bank Isn't Supported

Not every bank offers a direct feed. If yours doesn't appear in Xero, you can still bring your transactions in manually:

- 1 Download your bank statement from your online banking (OFX or QIF format works best)
- 2 In Xero, go to **Accounting > Bank Accounts > Manage Account > Import Statement**
- 3 Upload the file

4 A Few Things to Keep in Mind

- If you see the message "Only you can refresh this bank feed," the person who originally set up the login needs to reconnect it
- If a connection fails, try removing the feed and reconnecting
- Always double-check the correct account is matched in Xero
- Feeds usually only bring in transactions from the approval date onward, not your full history

HANDY TIP

Not sure which option applies to you, or run into an error along the way? This is exactly the kind of thing I'm happy to help set up for you — just reach out.

Need a hand?

This guide covers the basics, but if your bank isn't listed, or a connection isn't behaving, you don't have to sort it out alone.

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