

RESOURCE GUIDE

Download a Bank Statement (CSV Format)

A quick guide to exporting your bank transactions as a CSV file.

TR ACCOUNTING SERVICES

Bookkeeping support built for local businesses — Karratha & the Pilbara

Sometimes we need a CSV copy of your bank statement — for example, while your Xero bank feed is being set up. Most banks make this easy through online banking or their app.

If you can't find this option for your particular bank, just get in touch and I'll talk you through it. —

Thilini

1 Option 1 — Online Banking (Best Option)

- 1 Log in to your online banking (a computer is usually easiest for this)
- 2 Look for a section called **Statements**, **Transactions**, or **Exports & Reports**
- 3 Choose **Export** or **Download**, and select **CSV** as the file format
- 4 Select the correct account and the date range you need
- 5 Download the file and send it through to us

2 Option 2 — Your Banking App

- 1 Open your bank's app
- 2 Look for **Recent Transactions** or **Statements**
- 3 Look for a download or export option, and select **CSV** if you're given a choice of file format
- 4 Select the account and date range
- 5 Download the file and send it through

HANDY TIP

Every bank's app looks a little different. If you can't find this option, just let me know which bank you're with and I can point you in the right direction.

Need a hand?

If you're ever unsure which file format we need, or can't find this option for your bank, just ask — I'm happy to help.

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