Import an OFX(Open Financial Exchange) Bank Statement in Akaunting

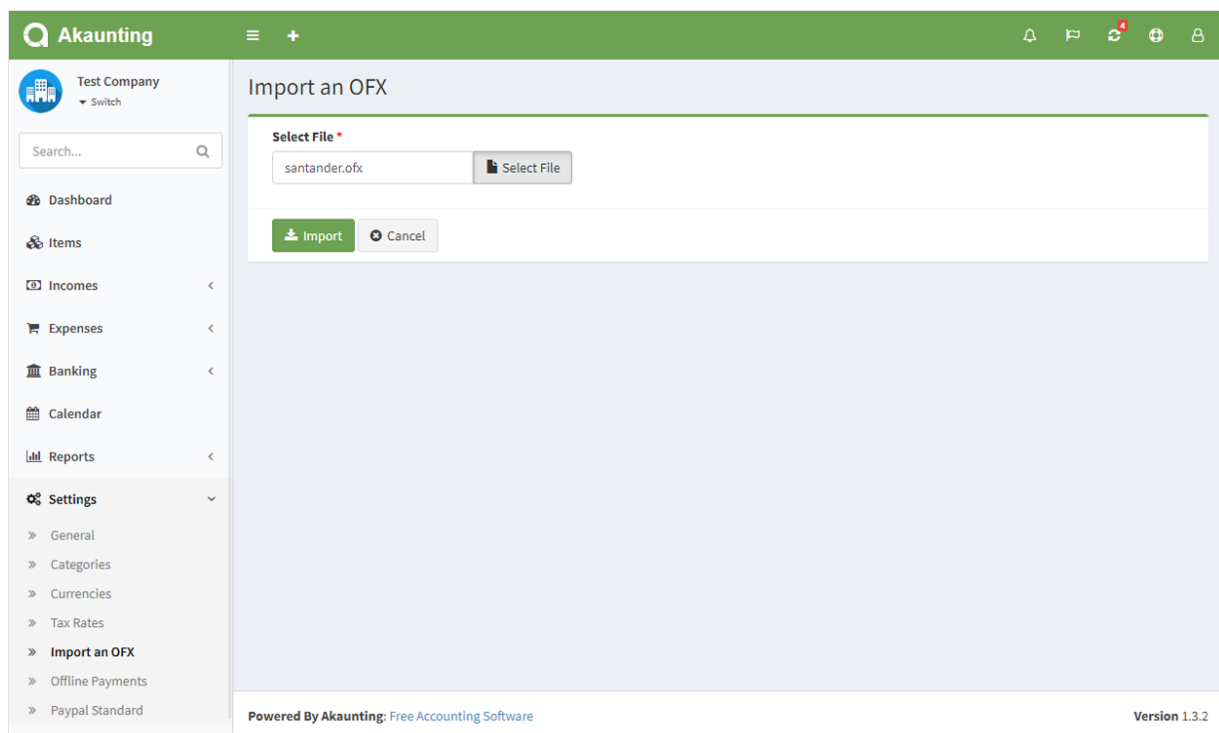

What's OFX File?

- An OFX (Open Financial Exchange) file is a text file containing financial data.

How to use?

Step1: Buy "**Import an OFX Bank Statement**" on Akaunting app store.

Step2: Click Settings -> "Import an OFX" in the left menu.

Step3: The file OFX to be transferred is selected and the press transfer button.

Step4: If the bank name and bank id are present in ofx file:

- The currency is checked. The currency is automatically added if it is not attached as a currency.
- If this information is not available, the user is asked to fill in the missing information.

Step5: The record is redirected to the successful page when the transfer is provided.
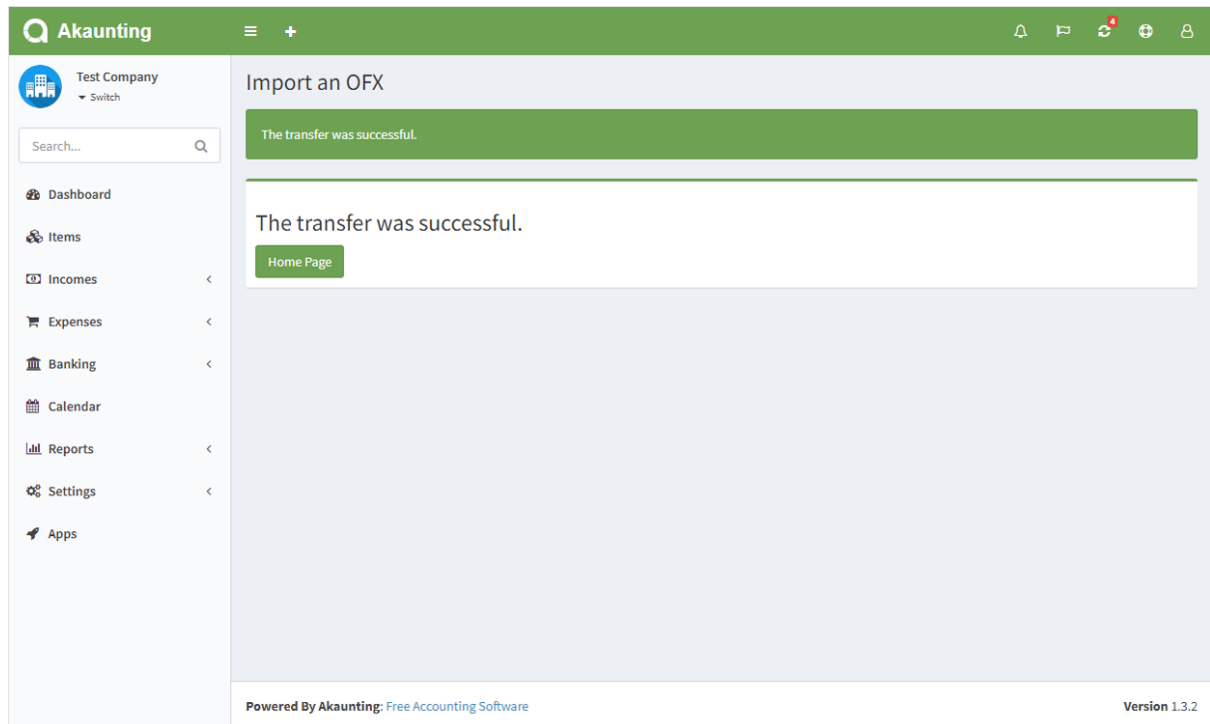
Testing: Your revenue and payment will be transferred when the transfer is successful.