

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



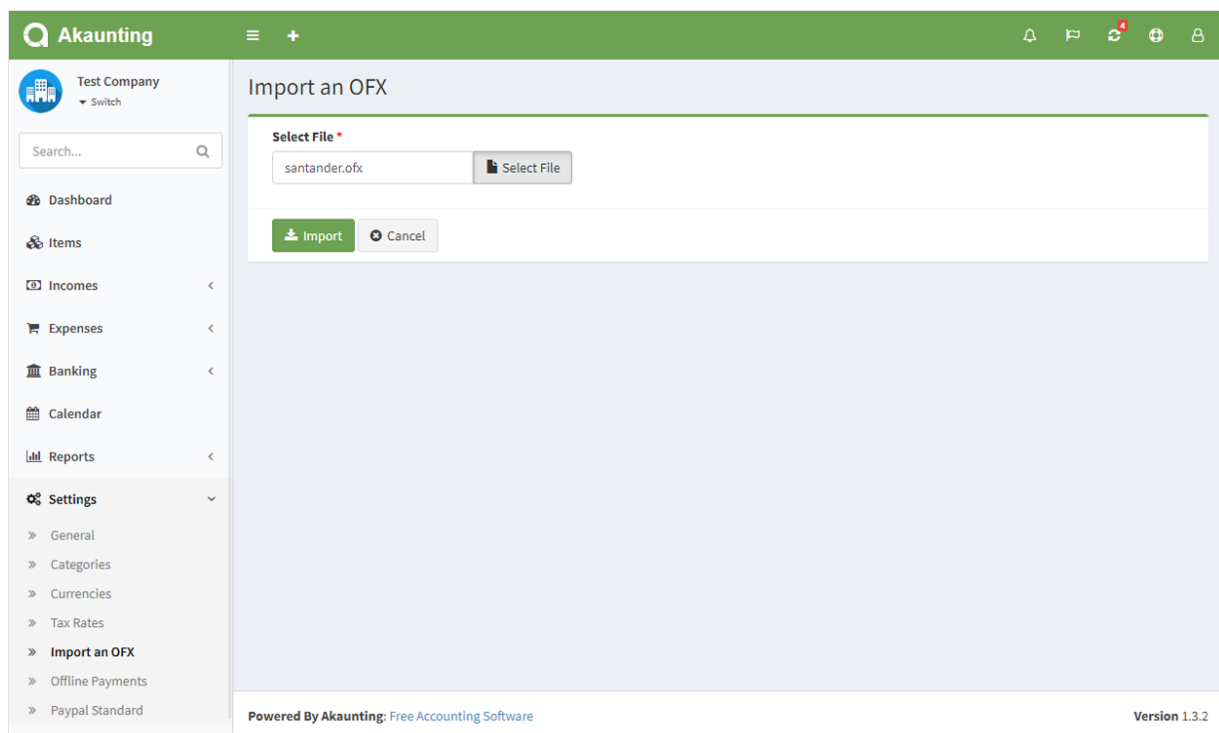
### What's OFX File?

- 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 "Import an OFX" in the left menu.



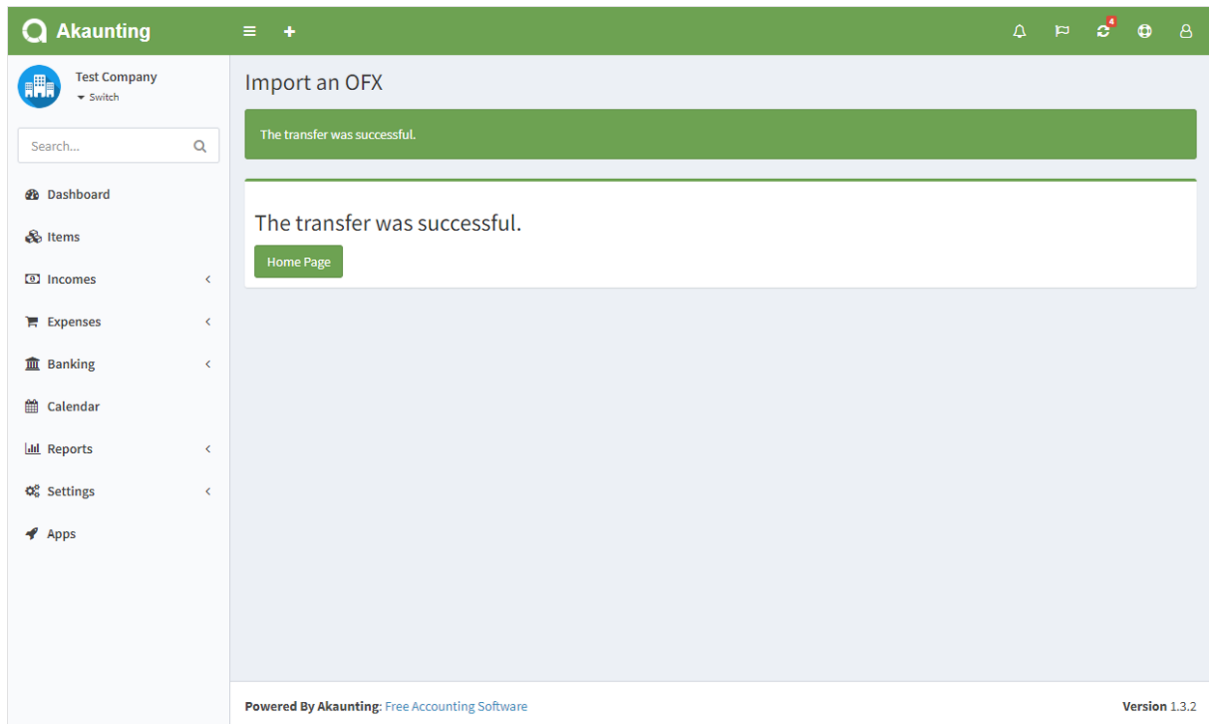
**Step3:** The file OFX to be transferred is selected and the press transfer button.

**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.

The screenshot displays the Akaunting web application interface. The top navigation bar is green with the Akaunting logo and a search icon. The left sidebar is light blue and contains a search bar and a list of navigation items: Dashboard, Items, Incomes, Expenses, Banking, Calendar, Reports, Settings, and Apps. The main content area is titled 'Import an OFX' and features a 'Bank Control' section. This section includes two input fields: 'Bank Name' with the value 'Santander Bank' and 'Bank ID' with the value '223223'. Below these fields is a green 'Import' button. The footer of the page shows 'Powered By Akaunting: Free Accounting Software' on the left and 'Version 1.3.2' on the right.

**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.

