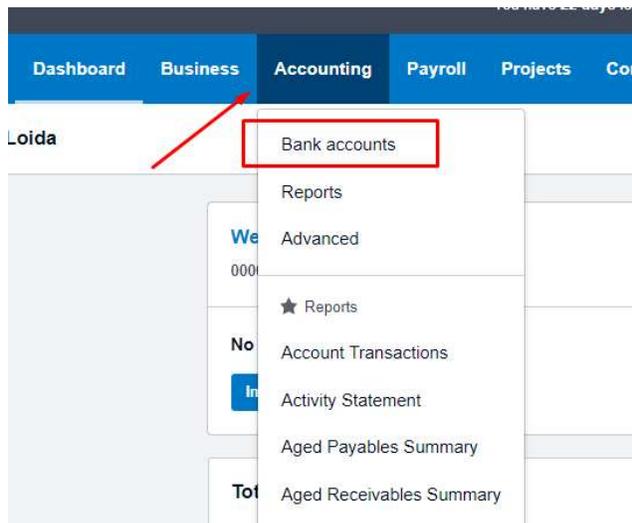


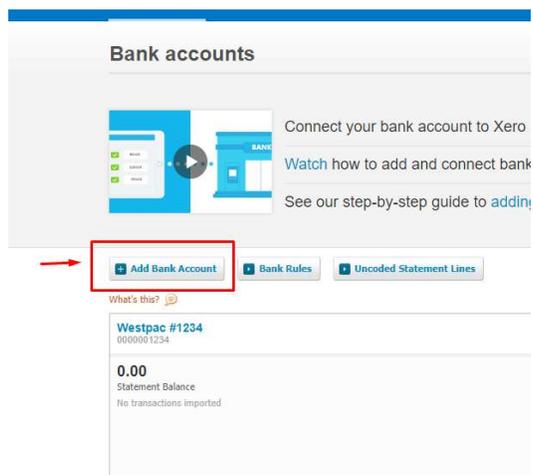
Adding a new bank account – Westpac credit card

OPTION 1 – Client to access for AUTO BANK FEED

1. Accounting tab >> click Bank accounts



2. Click +Add Bank Account



3. Choose the bank – Westpac AU Credit card

Find account

Search for a bank, credit card or payment provider to connect to Xero

 [Filter by country](#)
Country [Australia](#)

Popular banks in Australia

American Express (AU)	ⓘ
ANZ (AU)	ⓘ
Bendigo Bank (AU)	ⓘ
Commonwealth Bank CBA (AU)	ⓘ
National Australia Bank NAB (AU)	ⓘ
St George Bank (AU)	ⓘ
Westpac (AU)	ⓘ
Westpac (AU) - Credit Card	ⓘ

4. Ask your client to connect the bank by signing in to their bank – **AUTO Bank Feed**

Connect your bank



Enter your Westpac (Australia) details

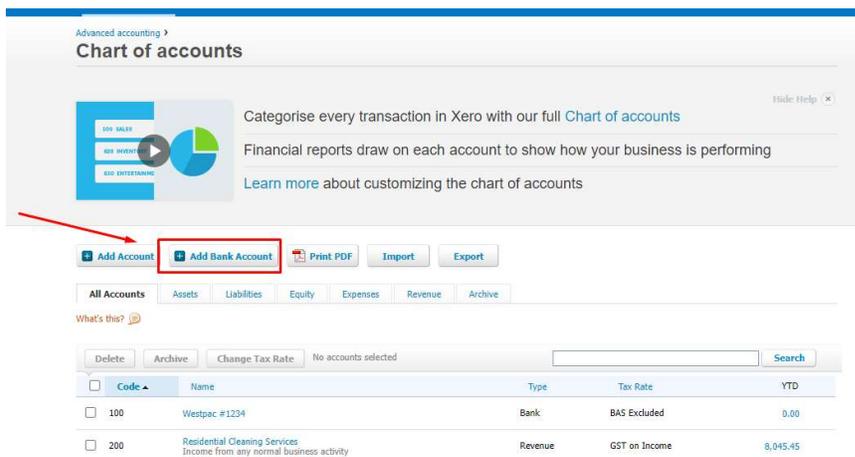
Make sure they're the same as the online banking details you use with Westpac (Australia)

Customer ID

Password

OPTION 2 – Set up without AUTO Bank feed

1. Go to Chart of Account >. Click + Add Bank Account



Advanced accounting >
Chart of accounts

Categorise every transaction in Xero with our full [Chart of accounts](#)

Financial reports draw on each account to show how your business is performing

[Learn more](#) about customizing the chart of accounts

[Add Account](#) [Add Bank Account](#) [Print PDF](#) [Import](#) [Export](#)

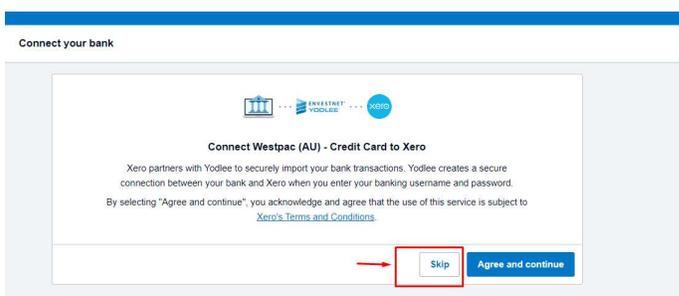
All Accounts Assets Liabilities Equity Expenses Revenue Archive

What's this? 🗨

Delete Archive Change Tax Rate No accounts selected Search

Code	Name	Type	Tax Rate	YTD
<input type="checkbox"/> 100	Westpac #1234	Bank	BAS Excluded	0.00
<input type="checkbox"/> 200	Residential Cleaning Services Income from any normal business activity	Revenue	GST on Income	8,045.45

2. Click Skip and click Don't connect to continue

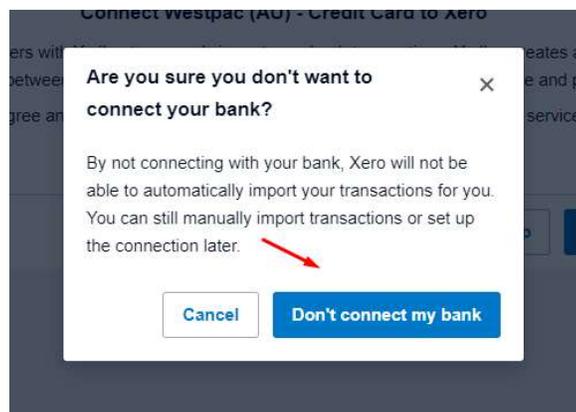


Connect your bank

Connect Westpac (AU) - Credit Card to Xero

Xero partners with Yodlee to securely import your bank transactions. Yodlee creates a secure connection between your bank and Xero when you enter your banking username and password. By selecting "Agree and continue", you acknowledge and agree that the use of this service is subject to [Xero's Terms and Conditions](#).

[Skip](#) [Agree and continue](#)



Are you sure you don't want to connect your bank?

By not connecting with your bank, Xero will not be able to automatically import your transactions for you. You can still manually import transactions or set up the connection later.

[Cancel](#) [Don't connect my bank](#)

3. Enter Bank details

Account details for Westpac (AU) - Credit Card

Account name
Westpac Visa #5678
A unique name for this account

Account type
Credit card

Credit card number 4/4
Last 4 digits: 5678

Account code (optional)
A unique code or number for this account

Currency
AUD Australian Dollar

Batch payments (optional)
 Batch payments are set up

[Learn about adding accounts](#)

4. Assign account code 150

✓ Westpac Visa #5678 has been added.

All Accounts | Assets | Liabilities | Equity | Expenses | Revenue | Archive

What's this?

No accounts selected

<input type="checkbox"/>	Code ▲	Name	Type
<input type="checkbox"/>		Westpac Visa #5678	Bank
<input type="checkbox"/>	100	Westpac #1234	Bank

5. Edit – enter account type as Credit card > Enter code as 150 then click save

The screenshot shows the 'Edit Bank Account Details' dialog box in Xero. The background shows the 'Chart of accounts' page with a table of accounts. The dialog box contains the following information:

- Your Bank:** Westpac (AU) - Credit Card
- Bank feeds:** Bank feeds are available (with a note to check the bank's home page).
- Account Name:** Westpac Visa #5678
- Account Type:** Credit Card
- Code:** 150
- Currency:** AUD Australian Dollar
- Credit Card Number:** XXXX - XXXX - XXXX - 5678

A red arrow points to the 'Save' button at the bottom of the dialog box.

- 10 . Import csv file for Westpac #1234 and Westpac Visa#5678