How do I import my files into Accounting?

To take your data from your bank or other account and put it into Farmbrite you will want to take the following steps.

On the accounting tab there is a dropdown arrow on the "Record a Transaction" button. Then click the "Import transactions" button. This will bring up directions to import your files.

Step 1.) Download the template. After you have the template you can put your data into this template and save it as a CSV file. (Direction link to show you how to do this is below.) You will then upload the CSV file into Farmbrite when you are happy with the data.

(You can find instructions here is you need them: https://support.office.com/en-us/article/save-a-workbook-to-text-format-txt-or-csv-3e9a9d6c-70da-4255-aa28-fcacf1f081e6).

Step 2.) Update the CSV template with your records.

Try a test first with just a few test records, to see if it works the way you expect it to. At the top of the spreadsheet you can have the following column headers: category, vendor, amount, description, date. The software will automatically categorize the entries for expenses and income as other unless you specify one. It knows that it is either an expense or income because of the negative or positive number, so to record an expense of $5.50 you should have a row in your spreadsheet with an amount of -5.50.

Also, remember to change the date format in your spreadsheet to "DD/MM/YYYY". Farmbrite will automatically try and understand whatever date format you use, but this one is our recommend format. To easily change the date format in excel, take a look at this article: https://support.office.com/en-us/article/format-a-date-the-way-you-want-8e10019e-d5d8-47a1-ba95-db95123d273e .

Step 3.) Upload & Import the files