

How do I import my bank data?

Last Modified on 02/21/2025 7:11 am MST

Getting transaction data from your bank or credit card website into Farmbrite can be accomplished in two different ways.

1. You can export data from their site and copy it into our preloaded template.
2. You can import the exported data file you get from them directly into Farmbrite and then map the data to the correct fields.

This choice is entirely up to you, and just depends on whatever process you find easier. We will outline both options in this article; you can use whichever you prefer after trying both!

 **Note: no matter which option you choose, *the only required field on the import sheet is an amount. All other data is optional.***

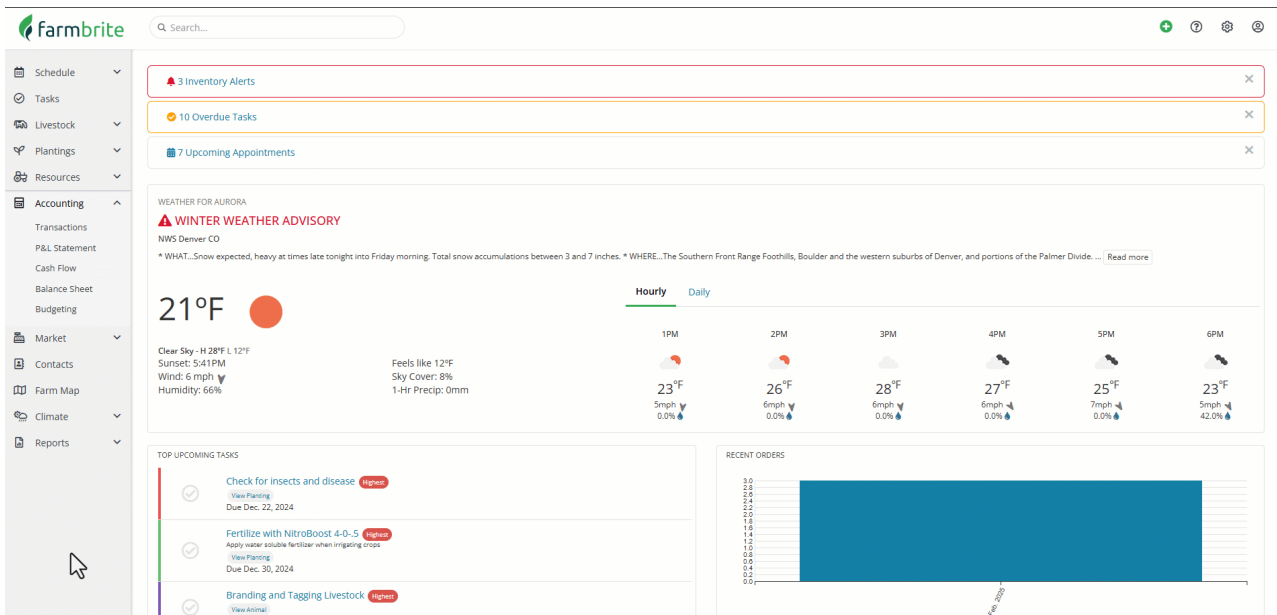
- *Farmbrite will automatically create the transactions as expenses if the amount is negative, and as income if the amount is positive.*
- *The system will default to today's date for the transaction if none is supplied.*
- *If you do not supply a category, Farmbrite will mark it as Unassigned, and it will be displayed on your dashboard in reports in that placeholder category.*

You can update any information on the transaction in Farmbrite later if you wish.

Getting the Data from Your Bank

This part of the process is a bit difficult for us to help with, as different banks and credit card companies have different websites and actions to accomplish this. **Overall, you should be able to go to the website and find a transactions list, and then look for an option to download or export the data.** The screenshot below is from the Wells Fargo website, with the "Download Account Activity" link highlighted. You'll see something like this no matter what bank you use. The site might give you an option to export in a specific format; you'll need the data in a comma-delimited file known as a .csv. This is a standard spreadsheet type for Microsoft Excel or Google Sheets. If you have problems with any of this on their site, we suggest contacting their customer service directly for support.

Once you have the spreadsheet .csv from your bank, you can then move to Farmbrite and load it into the software. Both options start in the same place, so navigate to the Accounting section on the left to get started. You'll an option to Import under the actions menu (3 dots) on the dashboard. Be sure to read through the tips and instructions on the page here.



Using the Farmbrite Template

Every bank exports data differently in their spreadsheet; you might see different columns, column order, formatting, etc. Farmbrite offers many different data fields you can track in transactions as well. These likely don't line up exactly between each other. Because of this, we provide a template with the correct column headers for you to use as the foundation of your import.

If you would prefer to work with a pre-formatted file with all of the possible data points you could add, and you like working in a spreadsheet, you can download the Template from the accounting import page and add your data to it.

Step 1. [Download the CSV Template File](#) 

You'll copy and paste the data from your bank's export into the sheet in the correct columns, with the date from your bank export going into the Date column, the amount of the transaction in the Amount column, and so on. You can also complete any additional columns at this point as well, if you'd like to assign the transaction to a category, associate it with a record in the software, or supply keywords and a description for it. Once you have added all the data you need, save the spreadsheet as a .csv file. You can then go back into Farmbrite and upload it.

In Step 2 of the import process you'll map your data to Farmbrite's fields. Since you used the template with the appropriate headers and columns, this will be done for you already, but it's always wise to double check that you added it correctly. When ready, click Import in the bottom right. You'll be given a results page with information about successful records and any errors that occurred from bad data on the spreadsheet.

