

Connecting a Bank Account

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If you want to save some time adding your accounting transactions to Farmbrite, you might connect your bank account to automatically bring your income and expenses into your accounting dashboard. You can use the secure connection to access your bank data, review the transactions, and then decide if they should be added to Farmbrite or ignored. You'll be able to work in bulk to categorize them and associate them with records as well.

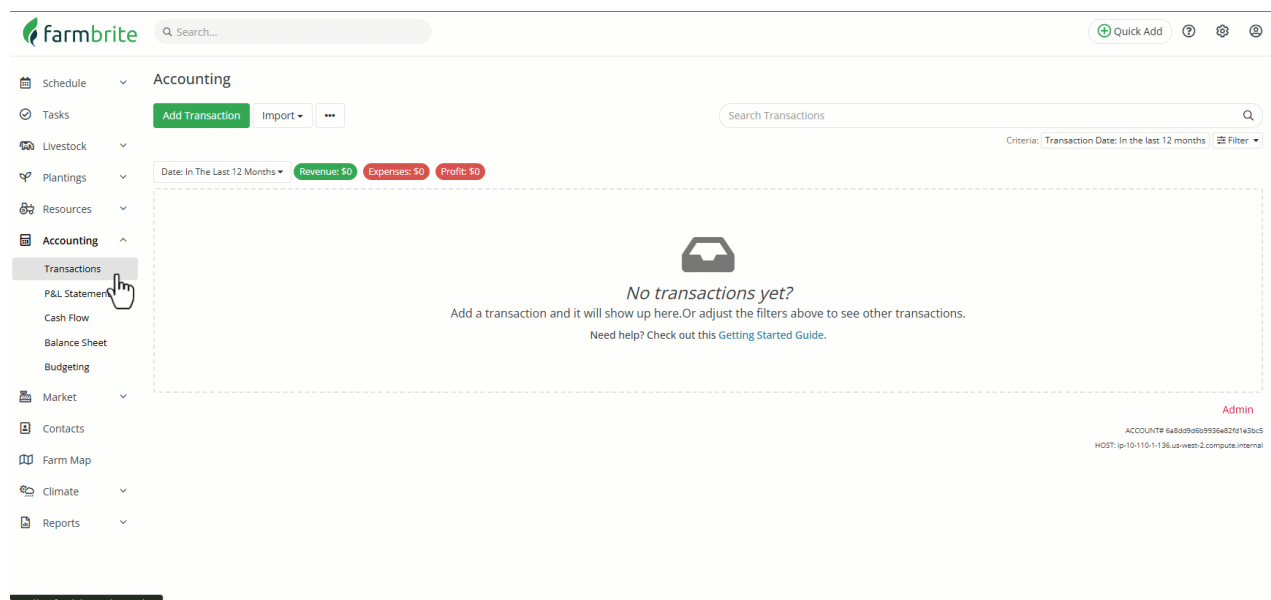
Note: Bank Account Connections are supported in Performance and Premium Level Farmbrite subscriptions. You can connect a single account on a Performance plan, and up to 5 accounts on a Premium. Additionally, only Admin and Accountant user roles have access to this feature.

Quick Summary

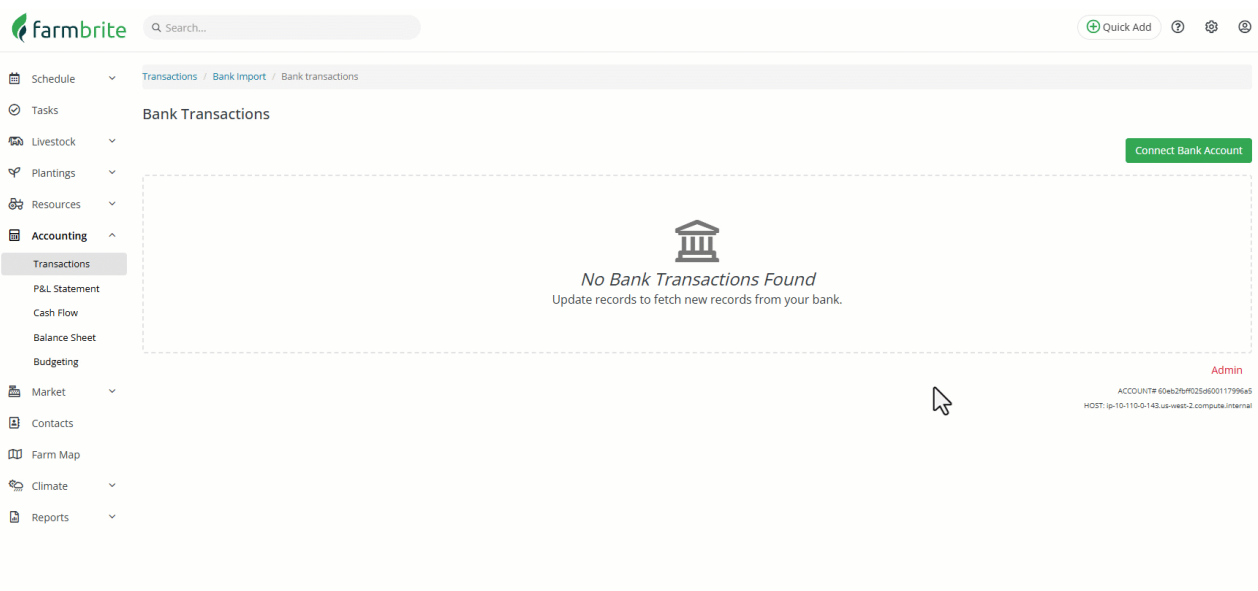
- You can connect your online bank account to transfer transactions directly to Farmbrite.
- You can review the posted transactions and decide if they should be added or ignored.
- You can assign financial categories and record associations to the transactions prior to importing them.

Connecting Your Bank Account

To get started with this, navigate to Accounting from the main menu. You'll then see an option to Import, where you can choose to [use a CSV file](#) or import from your bank. Choose to import from your bank, and then click the green button to Connect Bank Account.



Farmbrite uses [Link](#) to make this connection. You'll read and agree to the terms and conditions, and then supply your bank account login details here, the same credentials you would use to log into your online banking website. You may also need to receive a text and provide a verification code depending on your bank's authorization process. The process varies per bank, but once authorized, you'll be presented with a list of accounts to connect. This might be as simple as a checking and saving account, or might include other subaccounts. Choose the account(s) to connect and complete the process.

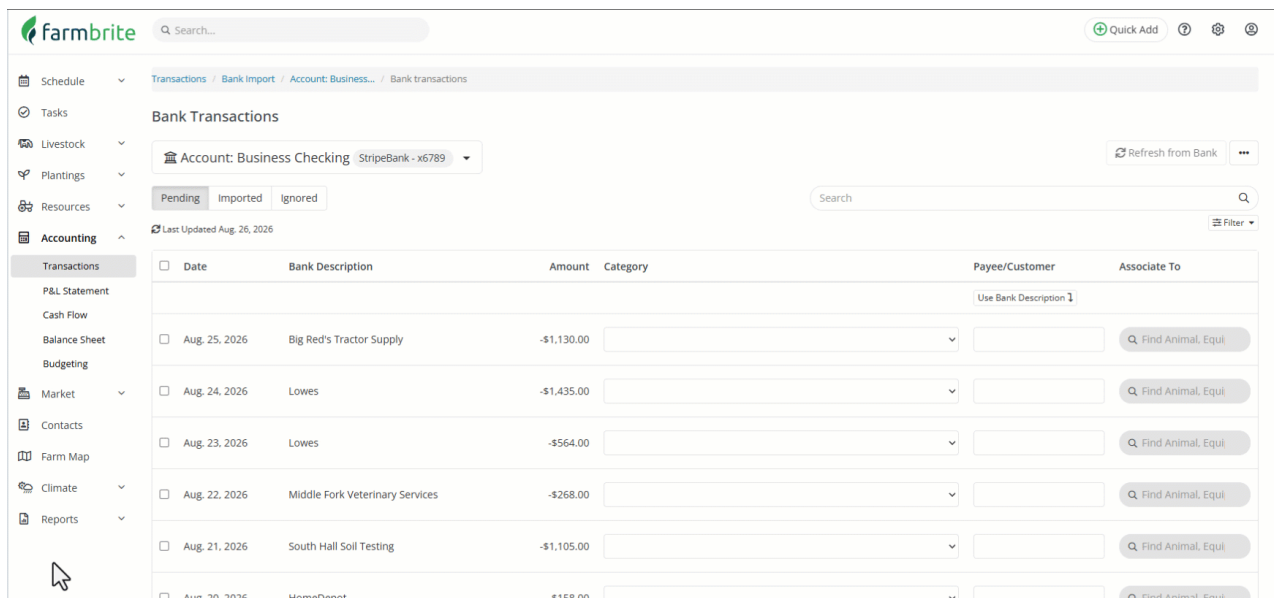


Be aware that Link is affiliated with Stripe, Farmbrite's credit card processing partner for your online store and market payments. We also use Stripe and Link internally here for your subscription payments. Note that no bank credentials are stored in Farmbrite.

Working with Connected Transactions

Once your account is connected, you'll see a list of transactions that were brought in from the integration. They are currently pending; you now have the opportunity to review them to assign them to categories and associate them with records, or ignore them entirely. If you connected multiple accounts, you can select which one you'd like to work with from the menu. The initial connection attempts to bring transactions from the past 180 days, but this may vary based on your bank and what data they supply.

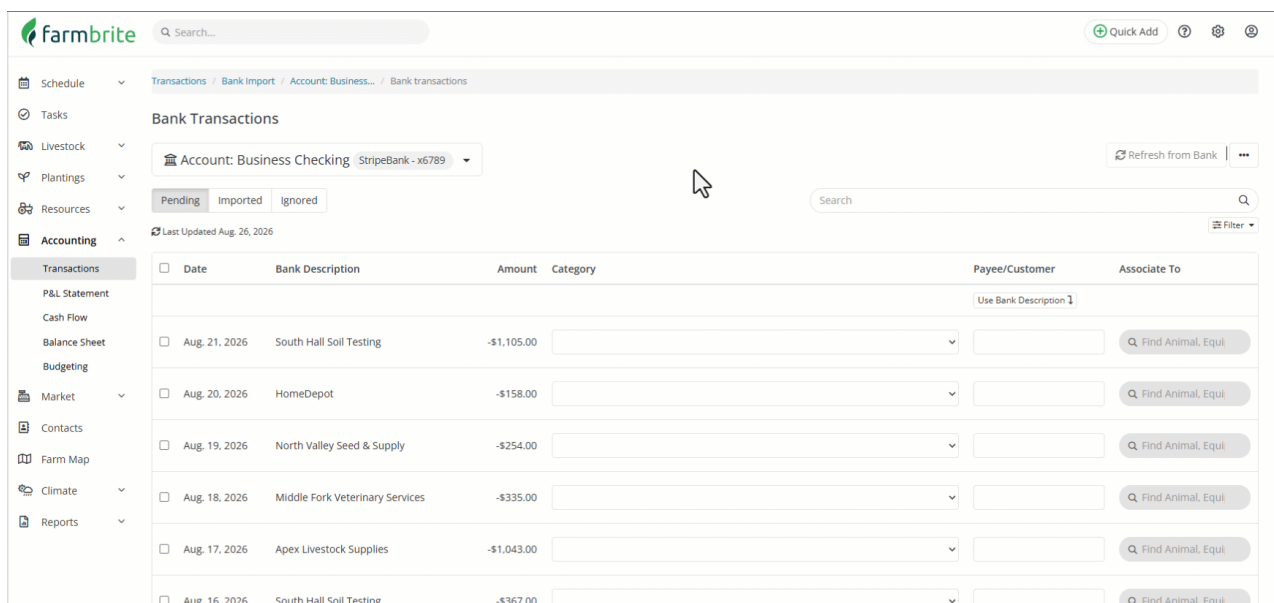
- **See that you land on the Pending tab,** which shows any transactions that were added from your bank connection that you have not yet reviewed. This is your chance to review the transactions and add only the ones you need.
- **You'll see a checkbox next to each transaction.** Select the ones you'd like to import (or bulk select them all using the box at the top of the column), and then choose a category for them. Both expense and income transactions are shown, and the menu shows the correct categories based on the transaction type. Note positive numbers indicate income, while negative numbers reflect expenses.
- **You can then complete the Payee/Customer details next.** This is essentially "who did you pay" for expenses, and "who paid you" for income transactions. The button at the top of the column to Use Bank Description will copy the bank description column to this, which might be useful and time saving. Be careful though, sometimes the descriptions can be vague and you might want to add more details.
- **Additionally, you can optionally associate the transaction with a record,** like an animal, piece of equipment, livestock group, grow location, or crop type.
- **Once you are ready to add the selected (checked) transactions, you can click the green Import button in the actions menu at the bottom.** The transactions are removed from the Pending tab and added to your Farmbrite accounting dashboard. They are also then displayed on the Imported tab for historical reference. You can view the transactions from this tab too.



The screenshot shows the Farmbrite interface with the 'Bank Transactions' page. The 'Pending' tab is selected, showing a list of transactions. Each transaction has a checkbox, a date, a bank description, an amount, a category, a payee/customer, and an 'Associate To' button. A mouse cursor is pointing at the 'Reports' link in the left sidebar.

☐	Date	Bank Description	Amount	Category	Payee/Customer	Associate To
☐	Aug. 25, 2026	Big Red's Tractor Supply	-\$1,130.00			Find Animal, Equi
☐	Aug. 24, 2026	Lowe's	-\$1,435.00			Find Animal, Equi
☐	Aug. 23, 2026	Lowe's	-\$564.00			Find Animal, Equi
☐	Aug. 22, 2026	Middle Fork Veterinary Services	-\$268.00			Find Animal, Equi
☐	Aug. 21, 2026	South Hall Soil Testing	-\$1,105.00			Find Animal, Equi
☐	Aug. 20, 2026	HomeDepot	-\$158.00			Find Animal, Equi

Any transactions that are left on the pending tab that you do not want added to your Farmbrite accounting dashboard can then be ignored. You can check the boxes next to them and choose ignore; they will then be moved to the Ignored tab. If you make a mistake, you can still work with them on that tab to move them over; the same features and actions outlined above for the Pending tab exist there as well.



The screenshot shows the Farmbrite interface with the 'Bank Transactions' page. The 'Ignored' tab is selected, showing a list of transactions. Each transaction has a checkbox, a date, a bank description, an amount, a category, a payee/customer, and an 'Associate To' button. A mouse cursor is pointing at the 'Update Records' button in the upper right area.

☐	Date	Bank Description	Amount	Category	Payee/Customer	Associate To
☐	Aug. 21, 2026	South Hall Soil Testing	-\$1,105.00			Find Animal, Equi
☐	Aug. 20, 2026	HomeDepot	-\$158.00			Find Animal, Equi
☐	Aug. 19, 2026	North Valley Seed & Supply	-\$254.00			Find Animal, Equi
☐	Aug. 18, 2026	Middle Fork Veterinary Services	-\$335.00			Find Animal, Equi
☐	Aug. 17, 2026	Apex Livestock Supplies	-\$1,043.00			Find Animal, Equi
☐	Aug. 16, 2026	South Hall Soil Testing	-\$367.00			Find Animal, Equi

Refreshing Your Transactions

You can refresh the connection once per day using the Update Records button to get the newest settled transactions from your bank account. This will find and load any new transactions since the last time the transactions were refreshed. While the length of time the transactions are accessible varies based on your bank policies, Farmbrite will store the pending (yet to be imported/ignored) transactions for up to 18 months.

Editing or Disconnecting Your Accounts

You can also rename or disconnect your bank account anytime you'd like. Just click the 3 dots action menu in the upper right. You can choose Edit Account to update the name, which will be reflected in the

selection menu. If you choose to disconnect the account, any transactions that are still pending will be lost, and no new transactions will be stored going forward. You would need to reauthorize the connection again if you wanted to bring over additional transactions.

Quick Add

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Schedule

Tasks

Livestock

Plantings

Resources

Accounting

- Transactions
- P&L Statement
- Cash Flow
- Balance Sheet
- Budgeting

Market

Contacts

Farm Map

Climate

Reports

Transactions / Bank Import / Account: Business... / Bank transactions

Bank Transactions

Account: Business Checking StripeBank - x6789

Refresh from Bank

Pending Imported Ignored

Last Updated Aug. 26, 2026

Search

Filter

☐	Date	Bank Description	Amount	Category	Payee/Customer	Associate To
					Use Bank Description	
☐	Aug. 21, 2026	South Hall Soil Testing	-\$1,105.00			Find Animal, Equi
☐	Aug. 19, 2026	North Valley Seed & Supply	-\$254.00			Find Animal, Equi
☐	Aug. 18, 2026	Middle Fork Veterinary Services	-\$335.00			Find Animal, Equi
☐	Aug. 17, 2026	Apex Livestock Supplies	-\$1,043.00			Find Animal, Equi
☐	Aug. 16, 2026	South Hall Soil Testing	-\$367.00			Find Animal, Equi
☐	Aug. 15, 2026	Middle Fork Veterinary Services	-\$64.00			Find Animal, Equi