

How to Open SmartBank

This includes 2 steps:

a) How to “Change Accounting Package”

Open SmartBank and either use the:

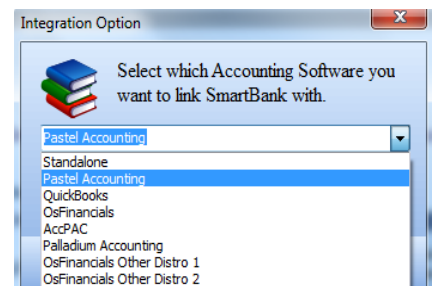
- 1) “Standalone example” on SmartBank or
- 2) Click on “**Change Accounting Package**” and select your Accounting package as shown below:



By clicking below you need to choose which accounting package you intend using to import the banks statements into? Currently, your choices include:

- 1) **Pastel Accounting Partner / Xpress** - V7 (2004) to V 14 (2015)
- 2) **OS Financials** - Exports Bank Statements straight to cashbooks
- 3) **TurboCASH** – Click on OSfinancials Other Distro 1 / Distro 2
- 4) **Palladium Accounting** – Coming soon
- 5) **Standalone Application** – Needs no other accounting package

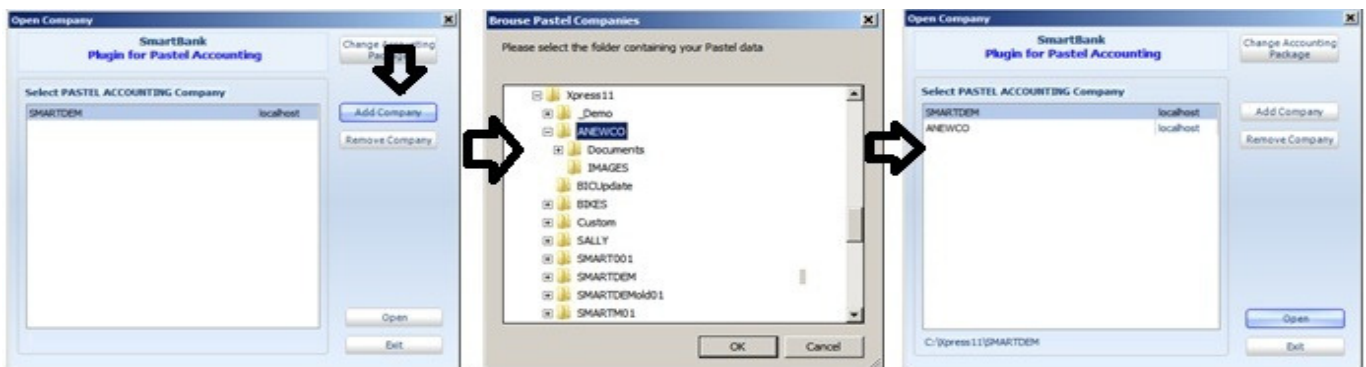
Note that the selection made will remain the default until changed again.



b) How to Add / Open a Company”

Click on “Add Company” and then, using Windows Explorer, find the company (e.g. Pastel Partner or Xpress – ANEWCO)

Then click on “Open” and the SmartBank screen will open showing the transaction import screen.



Then, using Windows Explorer, find the company (E.g. Pastel Partner or Xpress – ANEWCO) and then on “Open”