



# How to connect Nedbank to Xero

Your user guide

August 2024

see money differently

**NEDBANK**

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## ▶ 1. Introduction

# Nedbank and Xero



In a first for South Africa's banking sector, Xero, the global accounting platform, and Nedbank have partnered to give clients data through a fully digital application programming interface (API)-enabled bank feed. The new feed is live and available to Nedbank clients with a Xero account, at no additional cost. Clients can now connect the feed from their Xero account.



This fully digital bank feed means that clients can import their banking transactions automatically and securely, directly from Nedbank into their Xero organisation. This bank feed is different from those already available in South Africa because it uses an online connection process, allowing clients to connect their Nedbank accounts to Xero seamlessly.



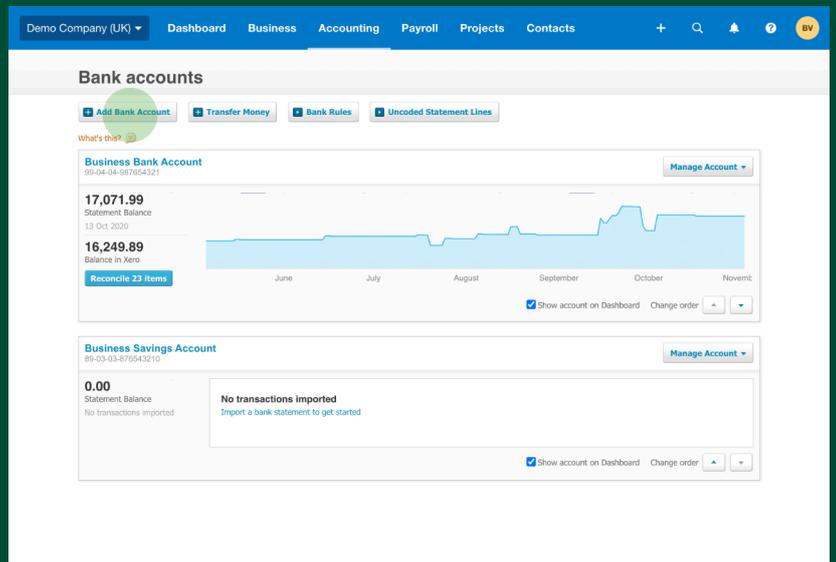
Clients can now reconcile statements, create smart, shareable reports and online invoices, and review cash flow from anywhere. This reduces the time spent on manually importing data significantly, and gives clients an up-to-date view of cash flow, helping them better understand their financial performance so they can make informed decisions.

## ▶ 2. How to set up a new direct feed

01.

Log in to your Xero organisation.

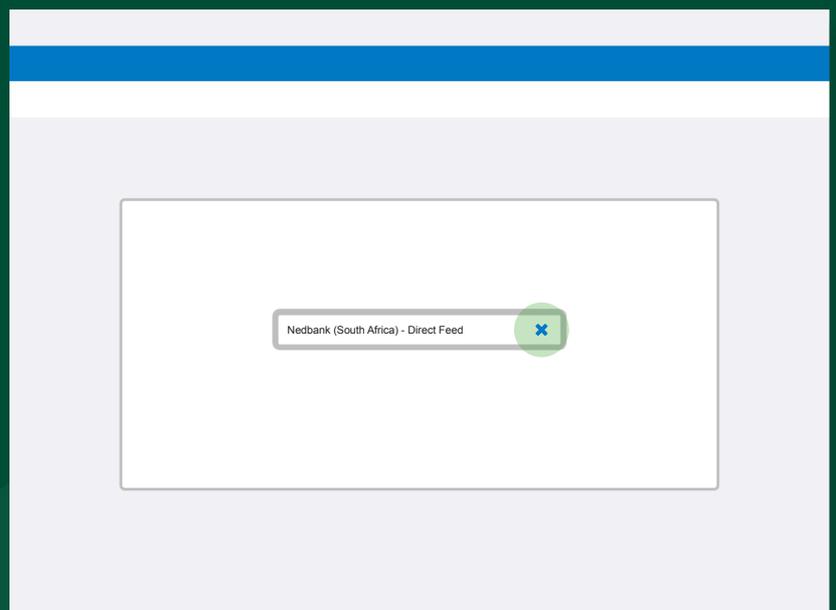
Go to the **Accounting** tab, then **Bank accounts** and select **Add bank account**.



02.

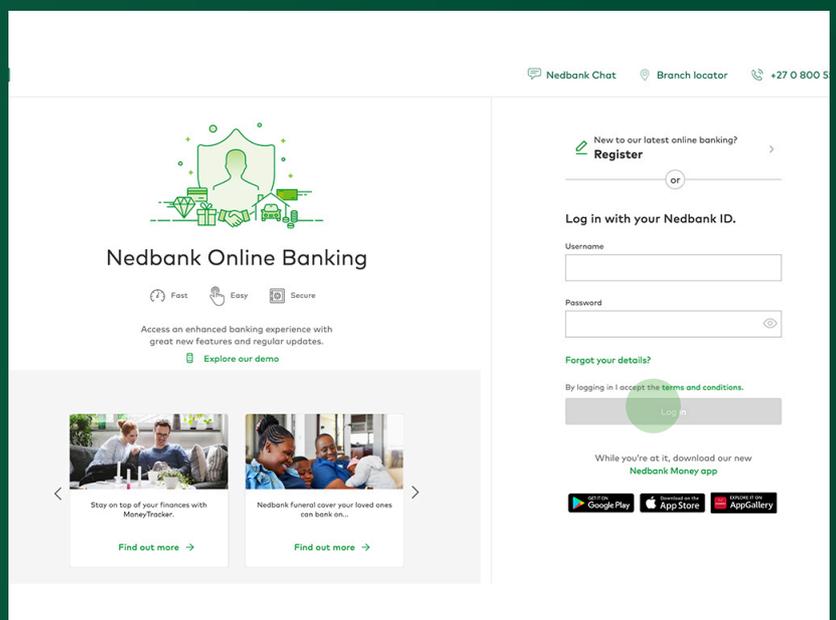
Type **Nedbank** in the **Find your bank** field and select **Nedbank (South Africa) - Direct Feed**.

Note: If you have a Xero organisation set up as your business country in South Africa, this option will appear in your **Popular banks** list.



03.

You will be redirected to the Nedbank ID API\_Marketplace website. Log in with your Nedbank ID.



## ▶ 2. How to set up a new direct feed

### 04.

If you have multiple profiles linked to your Nedbank ID, simply choose the profile associated with the account(s) you would like to link to your Xero organisation.

We have detected that you have multiple profiles.  
Please select one to continue with:

- P1 PROFILE 1  
1234567890
- P2 PROFILE 2  
1234567890

### 05.

Choose the account(s) you would like to link to your Xero organisation and continue.

For which accounts would you like to apply these authorisations?

Nickname	Account type	Account Number	Available balance
<input checked="" type="checkbox"/> Account 1	Current account	1234567890	R30,123.55
<input type="checkbox"/> Account 2	Current account	1234567890	R30,123.55
<input type="checkbox"/> Account 3	Current account	1234567890	R30,123.55
<input type="checkbox"/> Account 4	Current account	1234567890	R30,123.55
<input type="checkbox"/> Account 5	Current account	1234567890	R30,123.55

### 06.

You will now be redirected to Xero.  
Log in with your Xero credentials.



Log in to Xero

Username

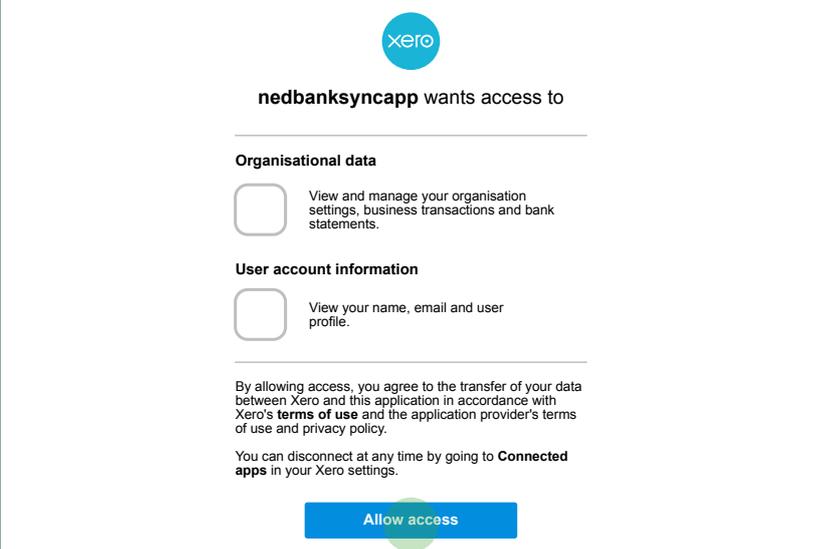
.....

Log in

## ▶ 2. How to set up a new direct feed

### 07.

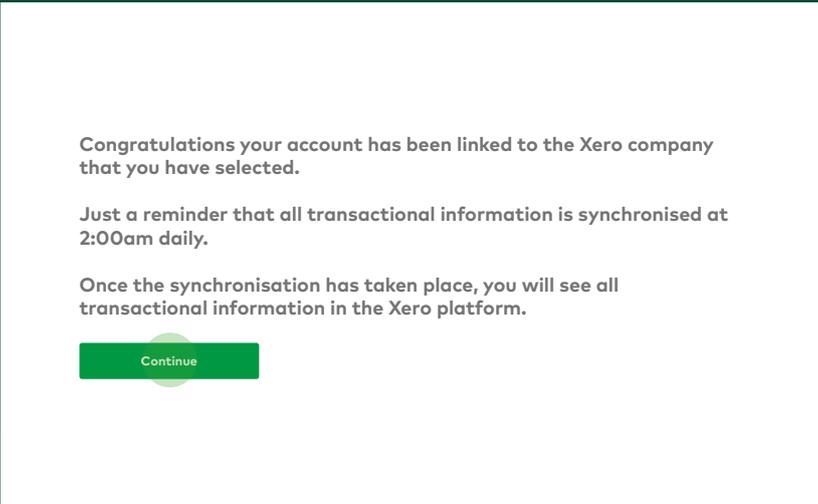
Grant access to your Xero organisation.



The screenshot shows the Xero authorization interface. At the top is the Xero logo. Below it, the text reads "nedbanksyncapp wants access to". There are two sections with checkboxes: "Organisational data" (View and manage your organisation settings, business transactions and bank statements) and "User account information" (View your name, email and user profile). Below these is a paragraph of terms and conditions, followed by a note: "You can disconnect at any time by going to **Connected apps** in your Xero settings." At the bottom is a blue "Allow access" button.

### 08.

Once the link has been created successfully, you will see an information screen on the Nedbank ID API\_Marketplace website.

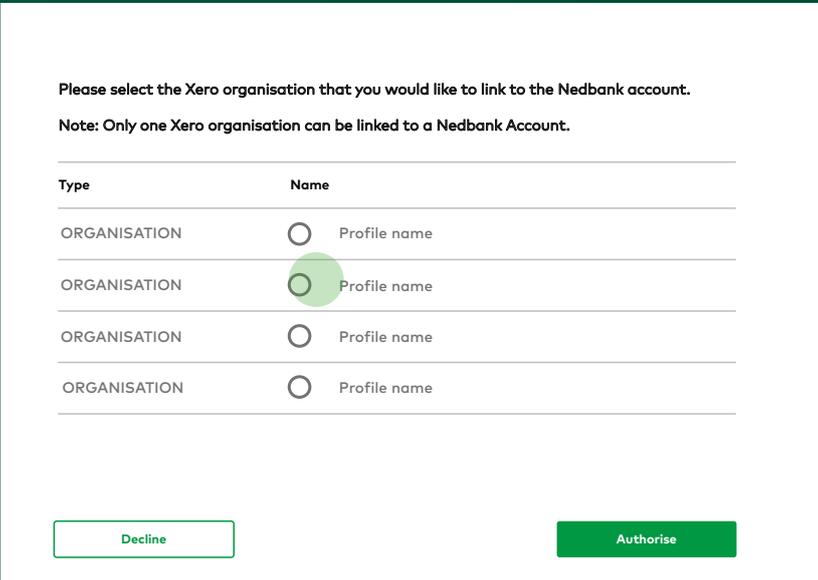


The screenshot shows a confirmation message: "Congratulations your account has been linked to the Xero company that you have selected." Below this is a reminder: "Just a reminder that all transactional information is synchronised at 2:00am daily." Another line of text states: "Once the synchronisation has taken place, you will see all transactional information in the Xero platform." At the bottom is a green "Continue" button.

### 09.

The above screen will appear only for Xero clients with multiple organisations.

Select the Xero organisation that should be linked to the selected Nedbank account and click on **Authorise**.



The screenshot shows a selection screen with the heading "Please select the Xero organisation that you would like to link to the Nedbank account." and a note: "Note: Only one Xero organisation can be linked to a Nedbank Account." Below is a table with two columns: "Type" and "Name".

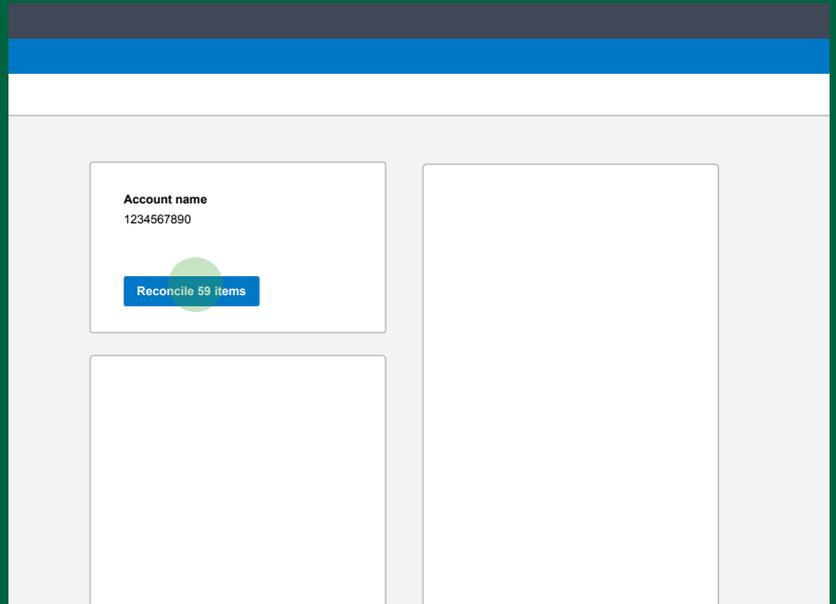
Type	Name
ORGANISATION	<input type="radio"/> Profile name
ORGANISATION	<input checked="" type="radio"/> Profile name
ORGANISATION	<input type="radio"/> Profile name
ORGANISATION	<input type="radio"/> Profile name

At the bottom are two buttons: "Decline" and "Authorise".

## ▶ 2. How to set up a new direct feed

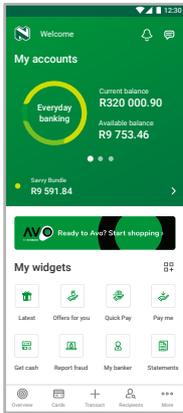
### 10.

You can now view your linked accounts from your Xero organisation.



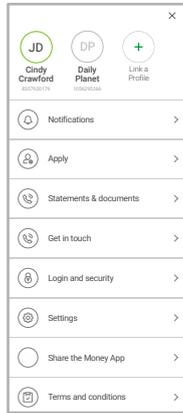
# ▶ 3. How to revoke a feed

## Money App



01.

Log into the Money app and tap on More.



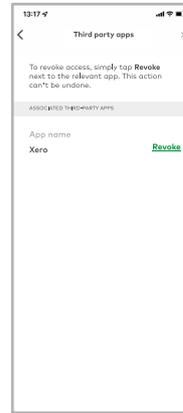
02.

Tap on Login and security.



03.

Tap on Third-party apps.



04.

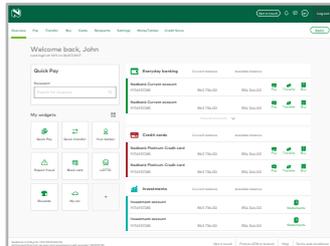
Tap on Revoke next to the associated third-party app that you would like to revoke.



05.

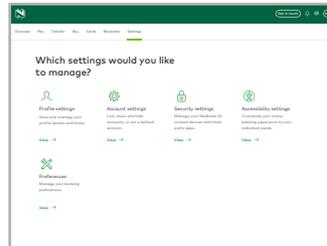
Tap on Revoke.

## Online Banking



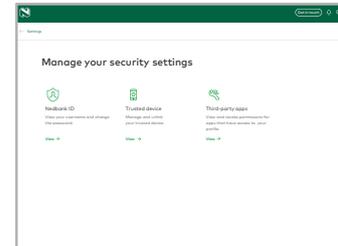
01.

Log in to Online Banking at <https://secured.nedbank.co.za> and click on Settings.



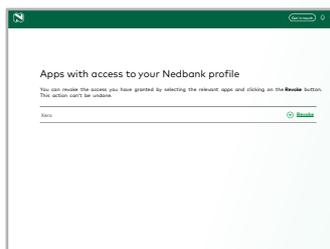
02.

Click on Security settings.



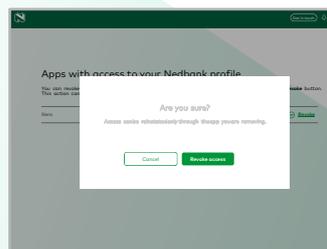
03.

Click on Third-party apps.



04.

Click on Revoke next to the Xero app you would like to revoke.



05.

Click on Revoke access.

## ▶ 4. Frequently asked questions

<p><b>How do I disconnect an existing Yodlee link?</b></p>	<p><b>I can't set up a new direct feed because my old Nedbank profile is still linked to my Xero profile.</b></p>	<p><b>I can't find my transactions in Xero.</b></p>
<p>Please visit <a href="https://central.xero.com/s/article/Nedbank-direct-feeds">https://central.xero.com/s/article/Nedbank-direct-feeds</a> and follow the relevant steps. You can set up a direct feed again by following steps 2 and 3.</p>	<p>Try disconnecting the feed in Xero and then set up a direct feed again by following steps 2 and 3.</p>	<p>Transactions are only available in Xero once the feeds are synchronised. Pending transactions will only synchronise when they are finalised.</p>
<p><b>Can I import my feed manually?</b></p>	<p><b>I get an error message saying that a feed already exists when I try to link the Nedbank feed.</b></p>	<p><b>I am struggling to log in to my Xero account.</b></p>
<p>Yes, you can. Refer to our guide at <a href="https://central.xero.com/s/article/About-manually-importing-bank-statements">https://central.xero.com/s/article/About-manually-importing-bank-statements</a>.</p>	<p>You have an existing feed connected to Nedbank that is active on the Xero platform. Try disconnecting the feed in Xero and then set up a direct feed again</p>	<p>To recover your login details, visit <a href="https://login.xero.com/identity/user/login/">https://login.xero.com/identity/user/login/</a> and click on Forgot password?</p>
<p><b>I have forgotten my Nedbank ID username or password.</b></p>	<p><b>Can I link multiple accounts to my Xero organisation?</b></p>	<p><b>Can I link one Nedbank account to multiple Xero organisations?</b></p>
<p>To recover your login details, please visit <a href="https://secured-id.nedbank.co.za">https://secured-id.nedbank.co.za</a> and click on Forgot your details?</p>	<p>Yes, you can link multiple Nedbank accounts to one Xero organisation. Follow step 3 to link each account.</p>	<p>No, unfortunately not.</p>
<p><b>How do I set or change my statement frequency to daily?</b></p>		
<p>You can ask your banker to change your statement cycle to 'daily'. Go to Get in touch on the Money app or Online Banking to see your banker's details.</p>		

## ▶ 4. Frequently asked questions

I am using direct feeds but some transactions are missing. Why is this and what can I do?	What kind of Nedbank accounts can I link to Xero?
<p><b>Pending transactions</b></p> <p>Your direct feed synchronises transactions that are marked as final by Nedbank. When transactions are pending, they are not considered final and therefore will not be synchronised via the direct feed. Once the transactions have been processed and considered final, they will be sent through.</p> <p><b>Set your statement cycle date to 'daily'</b></p> <p>A statement is marked as final when the cycle date is reached. For example, if it's a daily, it will be at the end of the day. If it is a weekly cycle, after seven days and if it is a monthly cycle, once a month at the end of the month.</p>	<p>The following account types are supported:</p> <ul style="list-style-type: none"><li>• Current accounts</li><li>• Credit cards</li><li>• Savings accounts</li></ul> <p>Should a product not be visible, please ask your banker to link it.</p> <p><b>Account types currently not supported</b></p> <ul style="list-style-type: none"><li>• Investment deposit accounts</li><li>• Loans</li><li>• Mortgages</li><li>• Foreign currency accounts</li></ul>

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For more information please visit  
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