Initialising Statement Direct

Last updated: August 10, 2022

The first time you use Statement Direct, you will want to import manually with a start date that you determine.

Select an appropriate “Start Date” for your first import.

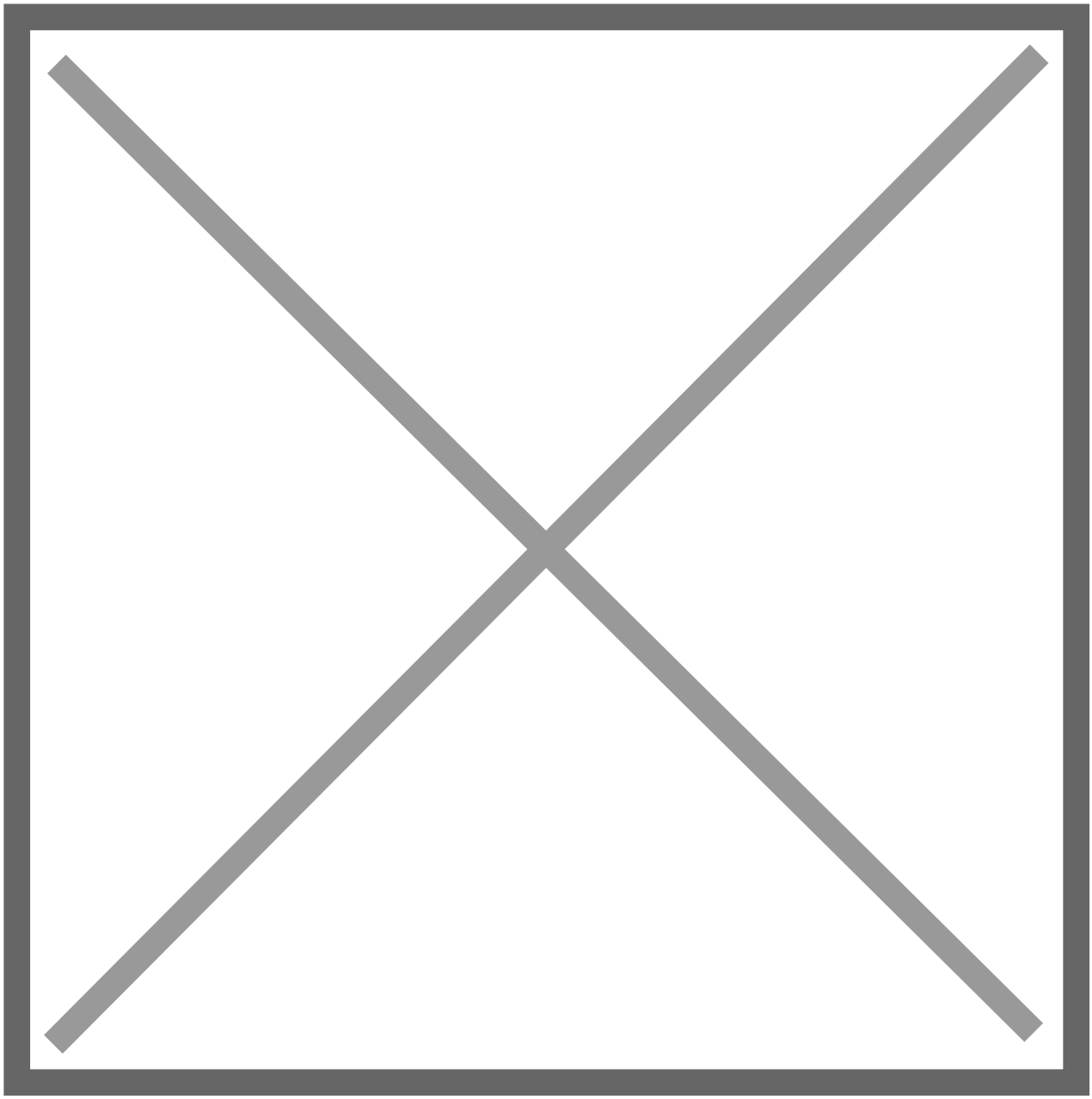
Change the “End Date” in the last column to the date that you want to import to.

For example, you want to have Statement Direct bring in 6th December 2014.

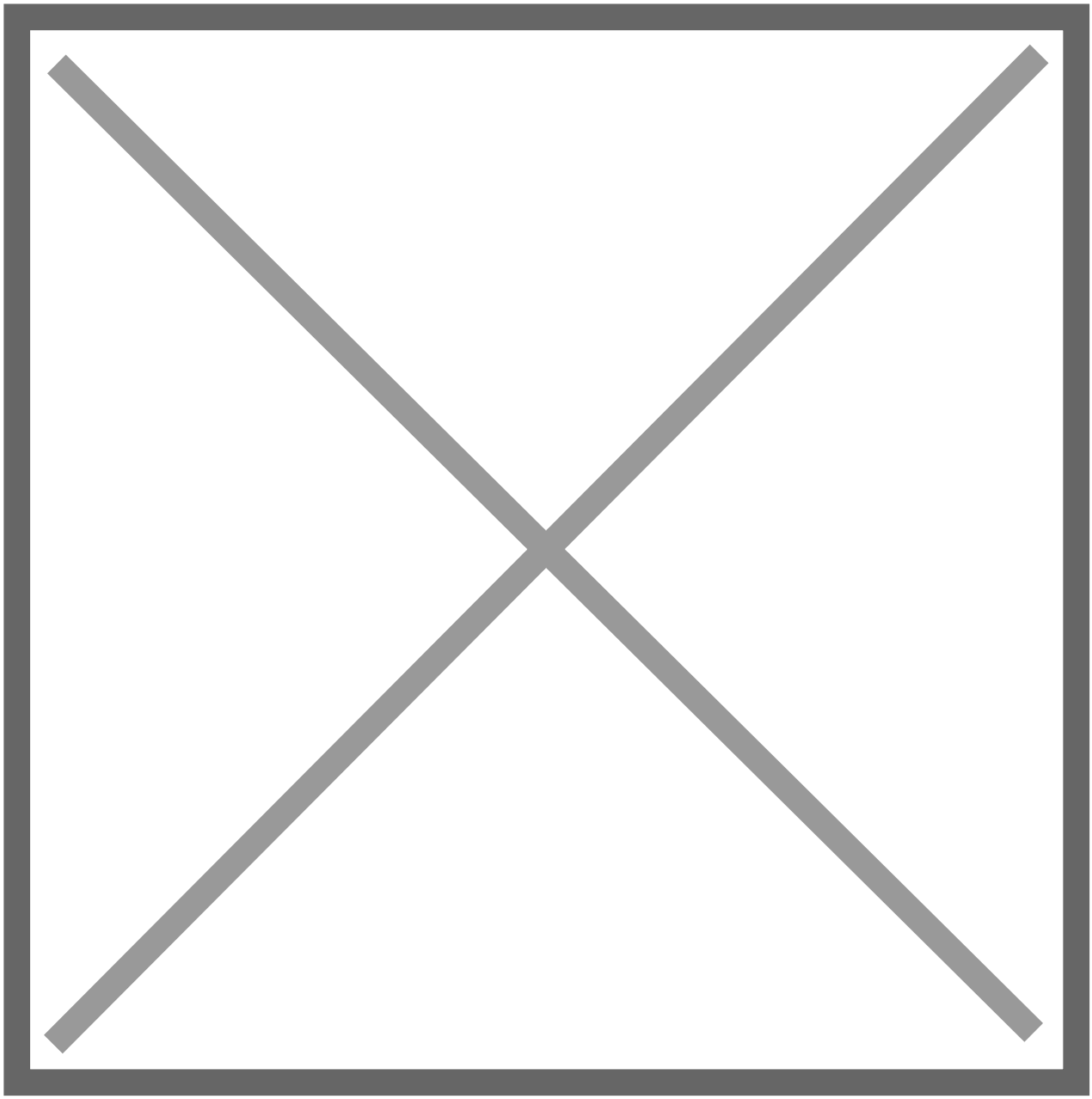
Select the “Start Date” as 6th December 2014

Select the “End Date” as 6th December 2014

Select “Perform Tasks” and then you will receive a message letting you know how many transactions were imported.



The next screen looks like the one below and you can refresh until everything is complete.



Manual Processing is used for the initial download to set up some starting conditions (such as “Last End Date”) and can also be used as desired by the user.