

# BankConverter — User Guide

Convert PDF bank statements to Excel or CSV, and scan receipts into bookkeeping-ready data — all in your browser.

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## 1. Getting started

BankConverter turns PDF bank statements into clean spreadsheets and reads your receipts — ready for bookkeeping, your accountant or HMRC.

### Get started in 3 steps:

1. Create your account — email and password.
2. Choose a plan — start Free to try it, or pick Standard or Pro for more (see the Pricing page for current prices).
3. Open your Dashboard and upload a bank statement or a receipt.

No software to install — BankConverter runs in your browser, and the Receipt Scanner also works on your phone.

## 2. Convert a bank statement

Turn a PDF bank statement into a tidy CSV or Excel file in seconds.

### To convert a statement:

1. On the Dashboard, click Upload and choose your PDF bank statement.
2. BankConverter detects your bank and reads every transaction.
3. Review the table — date, description, money in / out and running balance.
4. Click Download and choose CSV or Excel.

- 20+ UK banks supported — HSBC, Barclays, Lloyds, NatWest, Santander, Monzo, Revolut, Starling, Halifax, Metro Bank, Chase and more.
- Personal and business accounts.
- Multi-page statements are handled automatically.

Your figures are reconciled against the statement's opening and closing balance, so the totals match the original.

## 3. Check and fix your figures

BankConverter checks every statement against its balances. If something needs your attention, you will see a coloured banner above the results.

- Yellow banner — a row was auto-detected from a balance gap; review it before you use the file.
- Red banner — the totals do not reconcile; check the figures against the original statement.
- You can re-categorise or edit any row before downloading.

Always sanity-check the opening and closing balance against your statement — it takes a few seconds and catches any unusual PDF layout.

## 4. Receipt Scanner

Snap or upload a receipt and BankConverter reads the vendor, total, VAT and date — then exports it to a bookkeeping spreadsheet.

### To scan a receipt:

1. Open Receipt Scanner.
2. Take a photo, or upload an image or PDF of the receipt.
3. The OCR extracts vendor, total, VAT, subtotal, date and payment method.
4. Review and correct anything, then add it to your table.
5. Click Export to Excel to download all your receipts.

- Works with UK and Polish receipts.
- Recognises card, cash, BLIK and bank-transfer payments.
- Automatically skips non-receipts (for example passports or certificates).

Add BankConverter to your phone's home screen (Add to Home Screen) to scan receipts on the go, just like an app.

## 5. Plans and limits

Start free and upgrade when you need more.

- Free — try the converter with a monthly limit.
- Standard — for regular bookkeeping.
- Pro — unlimited conversions and the full toolkit.
- MTD for Income Tax is a separate subscription — see TaxBridge UK.

Current prices are on the Pricing page. You can change or cancel your plan at any time in Account settings, and you keep access until the end of the paid period.

## 6. FAQ and troubleshooting

My bank is not recognised. Make sure you uploaded the PDF itself (not a screenshot or photo of it). If a bank still is not detected, contact support — we add banks regularly.

The figures look wrong. Check the reconciliation banner and compare the opening and closing balance with your statement. You can edit or re-categorise any row before downloading.

What can I download? CSV and Excel (.xlsx) for bank statements, and Excel for receipts.

Is my data secure? Files are processed over an encrypted connection and are not shared; uploaded files are removed from temporary storage after processing.

Can I use it on my phone? Yes — the Receipt Scanner works in your mobile browser and can be added to your home screen.

How do I cancel? Go to Account settings, then Billing, and cancel at any time.