



ONE AND ALL
FINANCIAL SERVICES

Uploading online bank statements

A guide for clients who use online banking

One & All FS is a trading name of Oryx FS Ltd
Oryx FS Ltd is authorised and regulated by the Financial Conduct Authority
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Bank statement upload guidance

This guide is for customers who use online banking. We have included guidance to help you to download a Portable Document Format (PDF) version of your statements. We will need you to save these documents to the device you are currently using (mobile, tablet or laptop), and upload to your Personal Financial Portal

Please note that the bank statements need to show:

- The **business name** and (where possible) the **registered address**. These must match the business you have created the loan application for.
- The **sort code** and **account number**.
- **All daily transactions**.
- A history of a **minimum of three months** (with the most recent being within one month of your loan application date). If you can select an exact date range, be as up to date as possible.

Currently we don't support multi-upload of documents.

To upload all your bank statements at once, select all of the PDF files, right-click and 'Create zip file' (Mac) or 'Send to', 'Compressed zip folder' (PC).



- Visit **personal.natwest.com**
- Log in to Online Banking
- Once you're logged in, select 'Statements' from the options on the left of the screen
- Click on "view statements PDFs and certificates of interest"
- Choose an account from the list
- Choose a period of time to view
- Your full statement from that period will be displayed
- To download it as a PDF, simply click on the 'Download statement (PDF)' link at the top left
- When prompted, select 'Open' and your statement will be downloaded and opened as a PDF file
- You can now save it to your device, ready for upload to your Personal Finance Portal



- Visit **personal.rbs.co.uk**
- Log in to Digital Banking
- Once you're logged in, select 'Statements' from the options on the left of the screen
- Click on "view statements PDFs and certificates of interest"
- Choose an account from the list
- Choose a period of time to view (a full three months from the current date)
- Your full statement from that period will be displayed
- To download it as a PDF, simply click on the 'Download statement (PDF)' link at the top left
- When prompted, select 'Open' and your statement will be downloaded and opened as a PDF file
- You can now save it to your device, ready for upload to your Personal Finance Portal



- Visit **digital.ulsterbank.co.uk**
- Log in to Digital Banking
- Once you're logged in, select 'Statements' from the options on the left of the screen
- Click on "view statements PDFs and certificates of interest"
- Choose an account from the list
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- Visit **Santander.co.uk**
- Log in to Online Banking
- Click on the 'Account Services' tab
- This brings up the 'Account Overview'
- Select the 'E-Documents' tab
- On the drop-down menu (currently on 'All'), select the month(s) you wish to download
- Click on the envelope symbol
- You can now save it to your device, ready for upload to your Personal Finance Portal



- Visit **hsbc.co.uk**
- Log in to internet banking
- Go to accounts
- Go to statements
- Select an account
- Select download
- Select date range required
- Save to your device
- You can now save it to your device, ready for upload to your Personal Finance Portal



- Visit **Barclays.co.uk**
- Log in to Online Banking
- Click on the name of the account you wish to view
- Underneath the heading of 'Quick Links', please select 'View Statements'
- Scroll down and, on the far right, click on the PDF symbol for the statement you wish to view
- Repeat a further 2 months
- You can now save it to your device, ready for upload to your Personal Finance Portal



Using Google Chrome:

- Visit **www.lloydsbank.com/online-banking/home.asp**
- Log in on the top right
- Select the account you wish to view (this will produce a snapshot view)
- Click 'Statements'
- Search the statement period you wish to view
- Press 'Print' at the bottom of the screen (a new window will open)
- Press 'Change'
- Choose 'Save as PDF'
- Repeat for subsequent pages
- You can now save it to your device, ready for upload to your Personal Finance Portal



- Visit **www.bankofscotland.co.uk**
- Log in on the top right
- Select the account you wish to view (this will produce a snapshot view)
- Click 'Statements'
- Search the statement period you wish to view
- Press 'Print' at the bottom of the screen (a new window will open)
- Press 'Change'
- Choose 'Save as PDF'
- Repeat for subsequent pages
- You can now save it to your device, ready for upload to your Personal Finance Portal



Using Google Chrome:

- Visit **www.tsb.co.uk**
- Log in
- Select the account you wish to view (this will produce a snapshot view)
- Click 'Statements'
- Search the statement period you wish to view
- Press 'Print' at bottom of the screen (a new window will open)
- Press 'Change'
- Choose 'Save as PDF'
- Repeat for subsequent pages
- You can now save it to your device, ready for upload to your Personal Finance Portal

The **co-operative** bank

- Visit **www.co-operative.co.uk**
- Log in
- On your homepage, select 'Statements' or 'Reports' from the left-hand menu
- Select 'Statements' from the drop-down list
- Select the Account No from the drop-down list
- Select the Date Range using the calendar icons
- After making your selection, click 'Search' to display the reports list
- Select your report by clicking on the 'Account Report ID'
- You can now save it to your device, ready for upload to your Personal Finance Portal