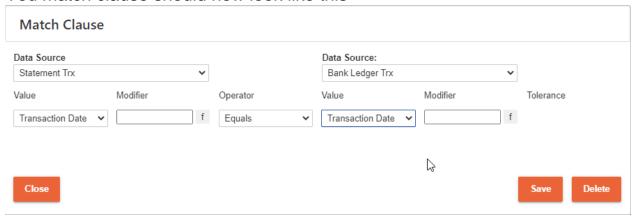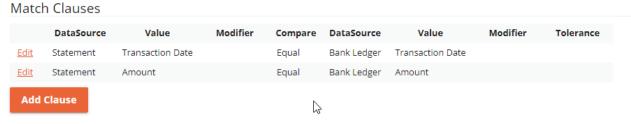# Setup a Simple Match Rule

Last updated: July 20, 2022

To setup a simple match rule to match transaction on Transaction Date and Transaction Amount
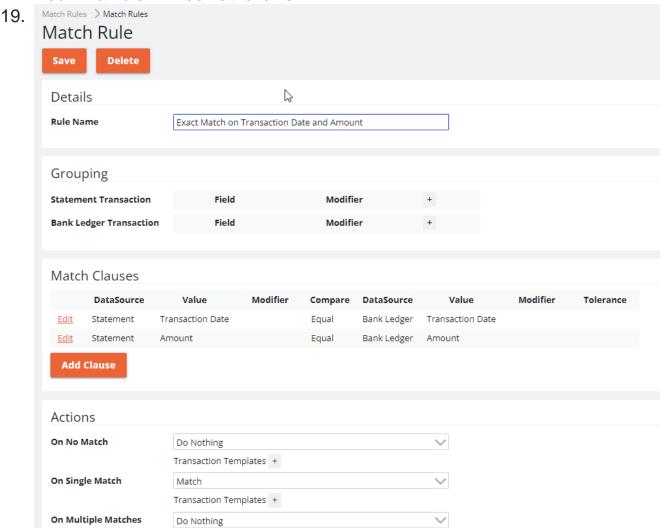
1. Goto **ABR -> Match Rules**
2. Click on **New**
3. Enter a **Rule Name** 'Exact Match on Transaction Date and Amount**'**
4. Under Match Clauses click **'Add Clause'**
5. On the left side, select **Data Source** 'Statement Trx'
6. In the **'Value'** dropdown, select 'Transaction Date'
7. On the right side select **Data Source** 'Bank Ledger Trx'
8. In the '**Value'** dropdown, select 'Transaction Date'
9. You match clause should now look like this

10. Click **'Save'** to save the clause
11. Next click '**Add Clause**' to add the 2nd part of the Rule
12. This time select '**Transaction Amount**' as the field on both sides
13. Click '**Save'**
14. You now have 2 clauses

Match Clauses

	DataSource	Value	Modifier	Compare	DataSource	Value	Modifier	Tolerance
Edit	Statement	Transaction Date		Equal	Bank Ledger	Transaction Date		
Edit	Statement	Amount		Equal	Bank Ledger	Amount		

Add Clause

15. Complete the rule by select what actions to take
16. For '**On Single Match**' select 'Match'
17. For '**On Multiple Matches**' select 'Take First' this ensures that even if there are multiple matching records at least 1 is used to match
18. Your final rule will look at follows
19.

Match Rule

Save   **Delete**

Details

Rule Name   Exact Match on Transaction Date and Amount

Grouping

Statement Transaction	Field	Modifier	+
Bank Ledger Transaction	Field	Modifier	+

Match Clauses

	DataSource	Value	Modifier	Compare	DataSource	Value	Modifier	Tolerance
Edit	Statement	Transaction Date		Equal	Bank Ledger	Transaction Date		
Edit	Statement	Amount		Equal	Bank Ledger	Amount		

Add Clause

Actions

On No Match	Do Nothing
	Transaction Templates +
On Single Match	Match
	Transaction Templates +
On Multiple Matches	Do Nothing

20. Click '**Save'** to save the rule