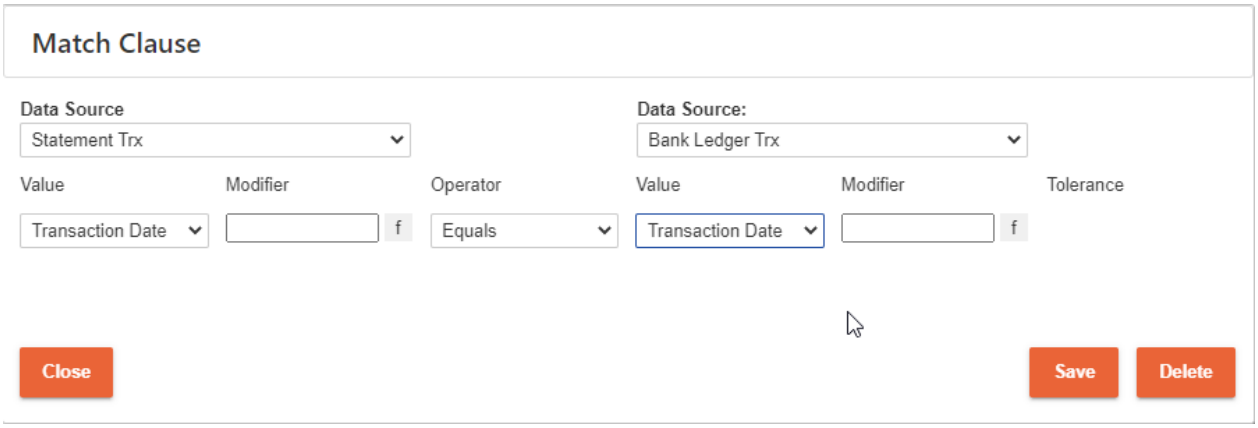
Setup a Simple Match Rule

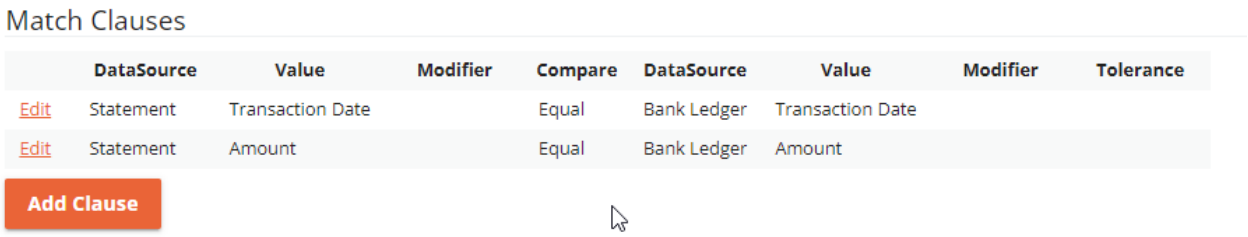
Last updated: July 20, 2022

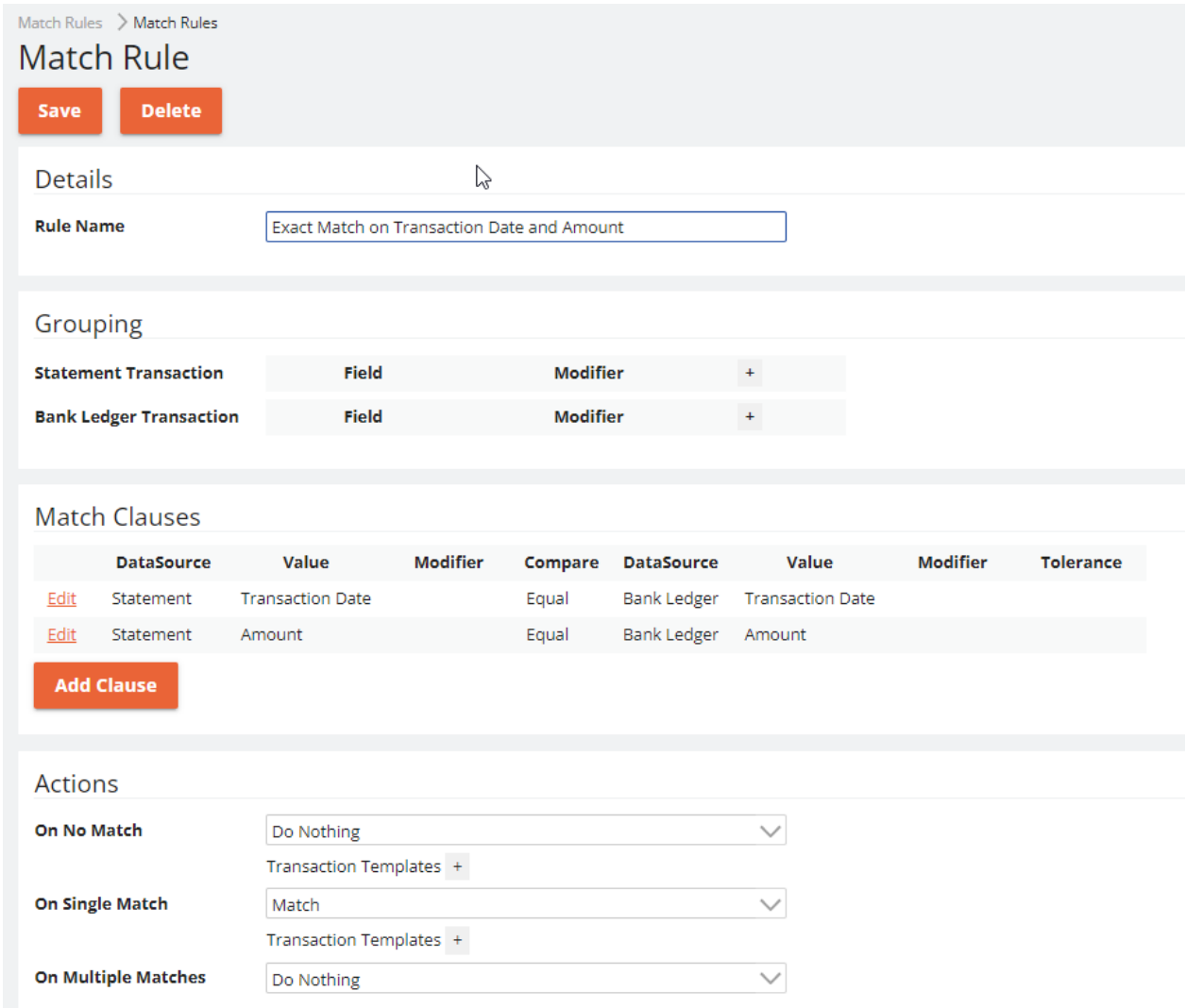
To setup a simple match rule to match transaction on Transaction Date and Transaction Amount

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



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. 

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