Rule with filters

Last updated: July 20, 2022

To setup a simple match rule to match transaction on Transaction Date and Transaction Amount, you can use a filter clause to limit the scope of this rule to only process specific Transaction Types.

This rule assumes you want to limit this rule to only process Statement lines which have a 'Transaction Type' of 121

1. Goto **ABR -> Match Rules**
2. Click on **New**
3. Follow 'Tutorial 1' to create a simple Rule
4. Under Match Clauses click **'Add Clause'**
5. On the left side, select **Data Source** 'Statement Trx'
6. In the **'Value'** dropdown, select 'Transaction Type'
7. On the right side select **Data Source** 'Constant'
8. In the '**Value'** field enter the '121'
9. Click 'Save'
10. You match clauses should now look like this
11.

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		
Edit	Statement	Transaction Type		Equal	Constant Value	'121'		

Add Clause