Rule with grouping

Last updated: July 21, 2022

Create a rule which groups by transaction date on the statement side. Then matches on transaction date and amount

1. Goto **ABR -> Match Rules**
2. Enter a '**Rule Name**' of 'Group by Date and match on Transaction Date and Amount Exact'
3. Under grouping Click the '**+**' next to the Statement Transaction
4. Select '**Transaction Date**' and click '**Save**'
5. Under match clauses click '**Add Clause**'
6. Pick Statement Transaction Date and Bank Ledger Transaction Date and click '**Save**'
7. Add another Clause with the '**Add Clause**' button
8. Pick Statement Transaction Amount and Bank Ledger Transaction Amount and click '**Save**'
9. Under Actions
10. On No Match = 'Do Nothing'
11. On Single Match = 'Match'
12. On Multiple Matches = 'Take First'