Match Function / Bank Feeds

1. Click on the tab called Recognized
2. When the text says **1 Record Found**
    a. Review the date in the column under category/match and review the date on the left side of the row.
    b. If the dates are within a few days of each other, choose **match**
    c. If the dates are weeks or more apart, click on the line and then click on the circle for **add**.
3. When the text says **2 Records Found**
    a. Click on the line to expand the details
    b. Review the related transactions, pick the transaction with the closest date to the date on the left side of the downloaded transaction.
    c. If there are multiple transactions with the same date… review the bank detail for more information to help you identify which line to match to the transaction. (Note: There are no shortcuts to make this easier/smoother/faster.)

Match Function / Bank Feeds

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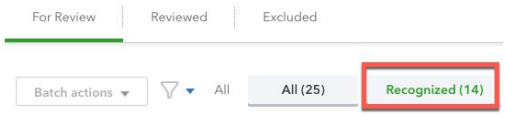

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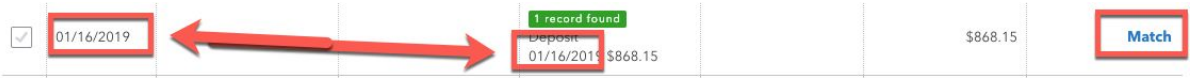

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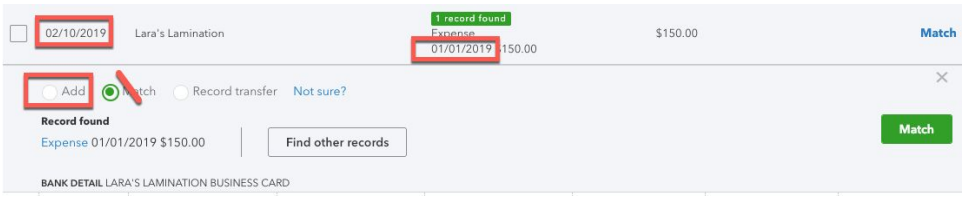
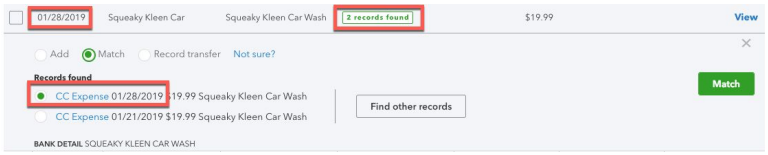
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