Bank Feeds and Rules.

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Agenda

What is a Bank Feed?

Common questions

Setting up

Demonstration

- Download your transactions
- Manual match
- Auto match
- Create missing transactions
- Complete your reconciliation
- Rules

Upcoming webinars

What is a bank feed?

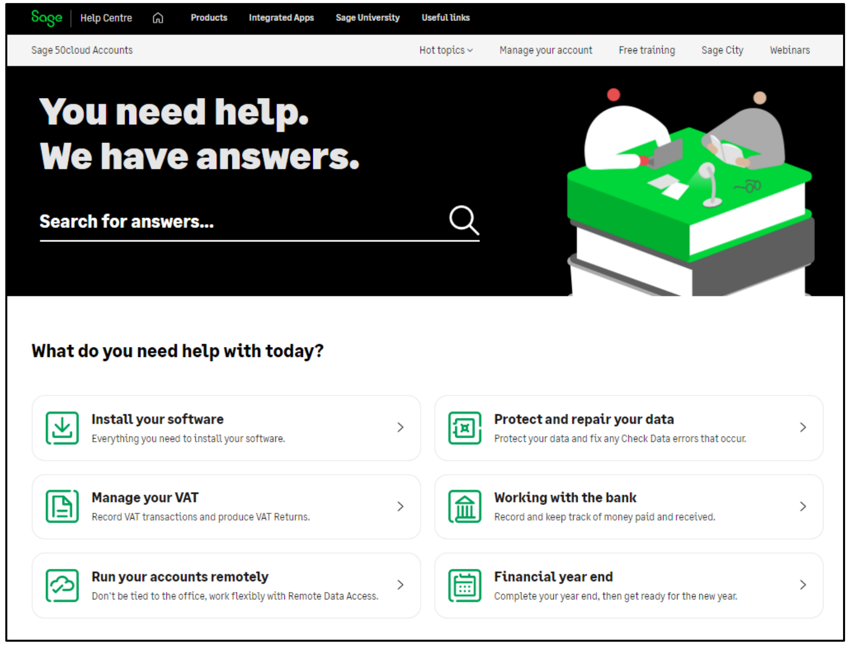
- In simple terms it’s a link between your bank account and your Sage Accounts software.

Benefits

- Download your bank transactions and compare them to those entered in Sage Accounts.
- Match your bank transactions to those entered in Sage and easily create any missing transactions.
- Set up rules to make automatic postings into your accounts.

Common questions.

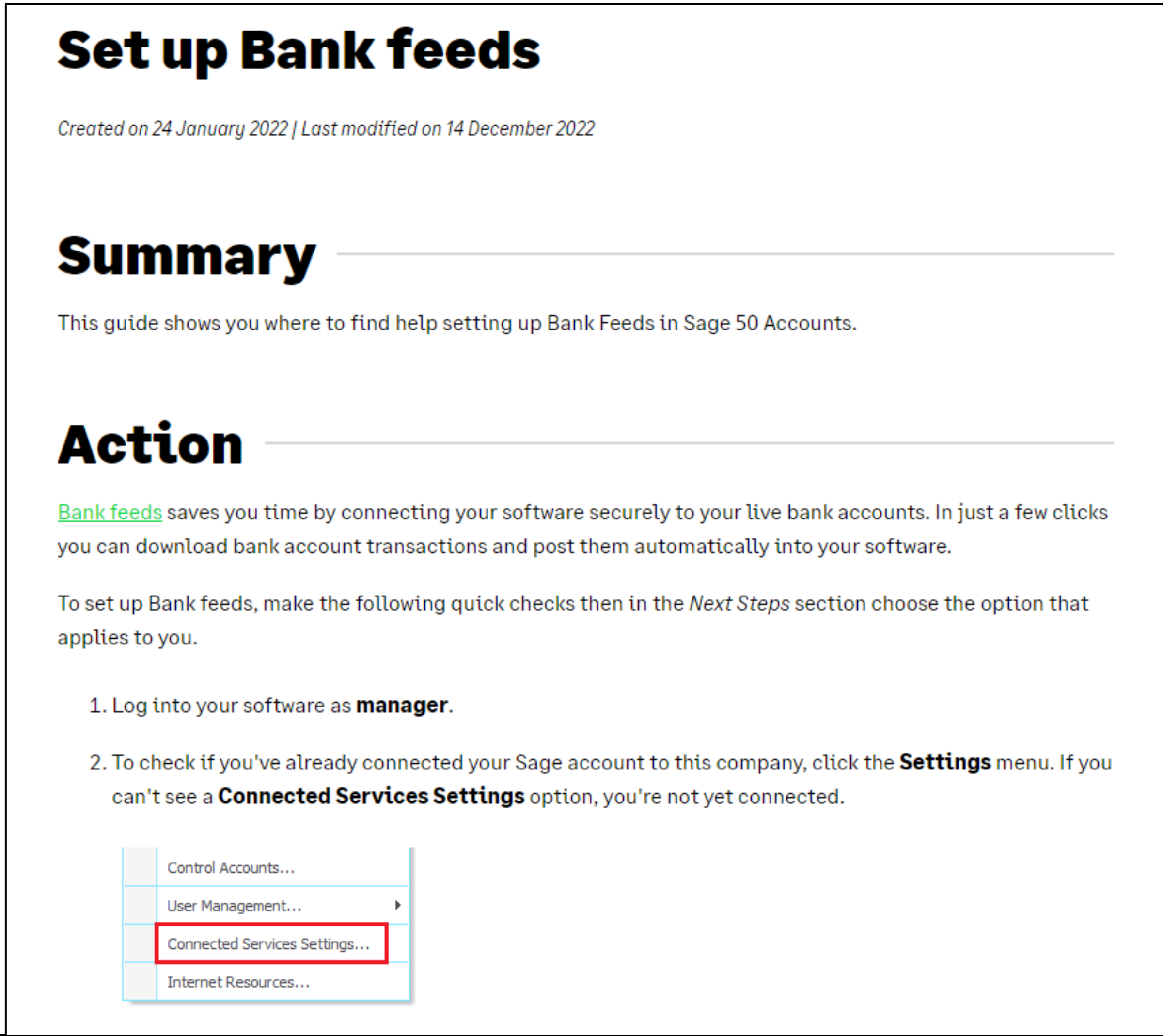
- How do I set up a bank feed?
- Is my bank supported?
- Can I set up multiple bank feeds?
- What if I'm using Remote Data Access (formerly Sage Drive)?



[Sage Help Centre]

Setting up.

- Follow the steps in the Help Centre to set up Bank feeds as the process varies in different versions of Sage 50 Accounts.



Set up Bank feeds

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Summary

This guide shows you where to find help setting up Bank Feeds in Sage 50 Accounts.

Action

Bank feeds saves you time by connecting your software securely to your live bank accounts. In just a few clicks you can download bank account transactions and post them automatically into your software.

To set up Bank feeds, make the following quick checks then in the *Next Steps* section choose the option that applies to you.

1. Log into your software as **manager**.
2. To check if you've already connected your Sage account to this company, click the **Settings** menu. If you can't see a **Connected Services Settings** option, you're not yet connected.

Set up Bank feeds

Demonstrations.

- Download your transactions
- Manual match
- Auto match
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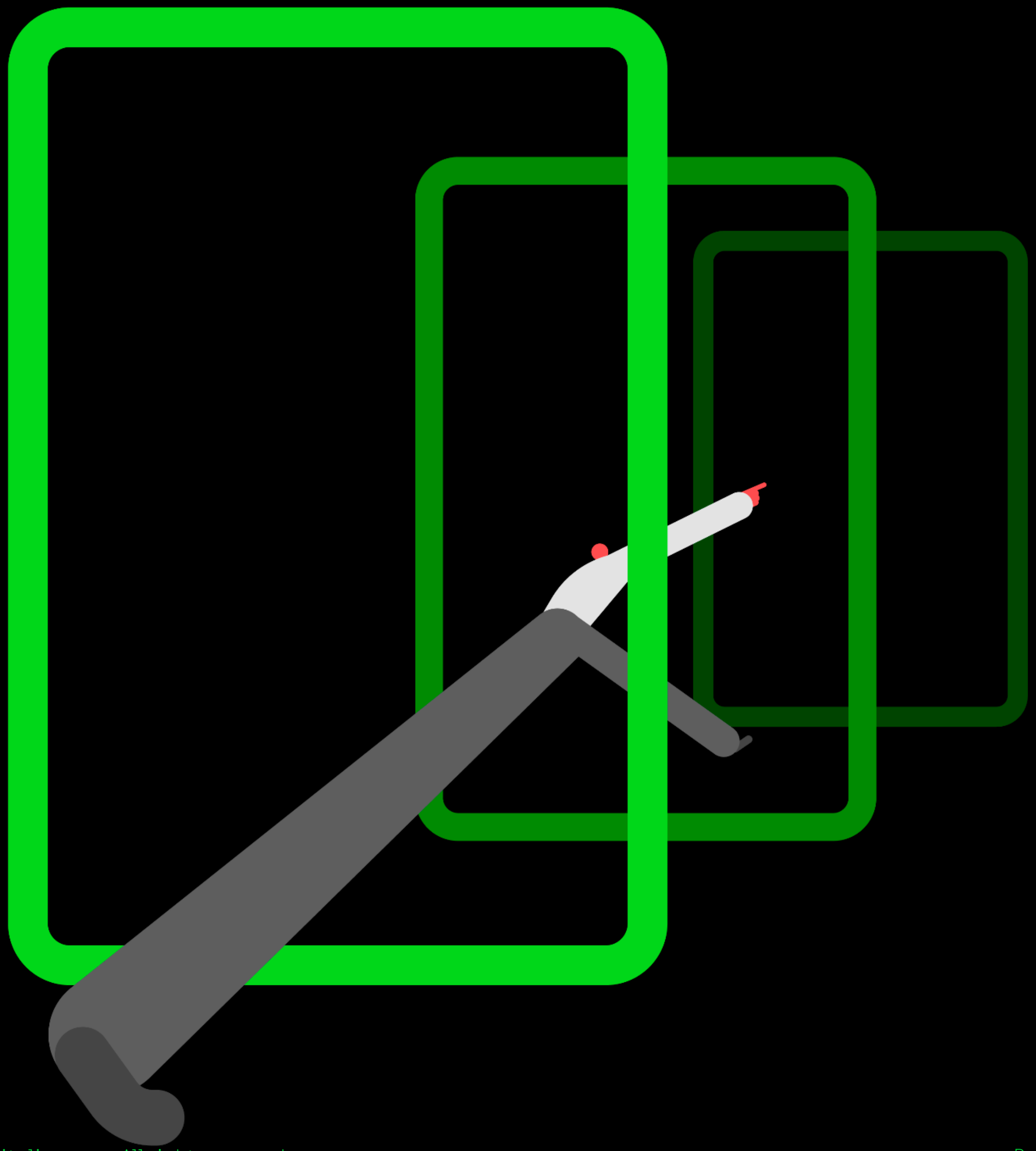
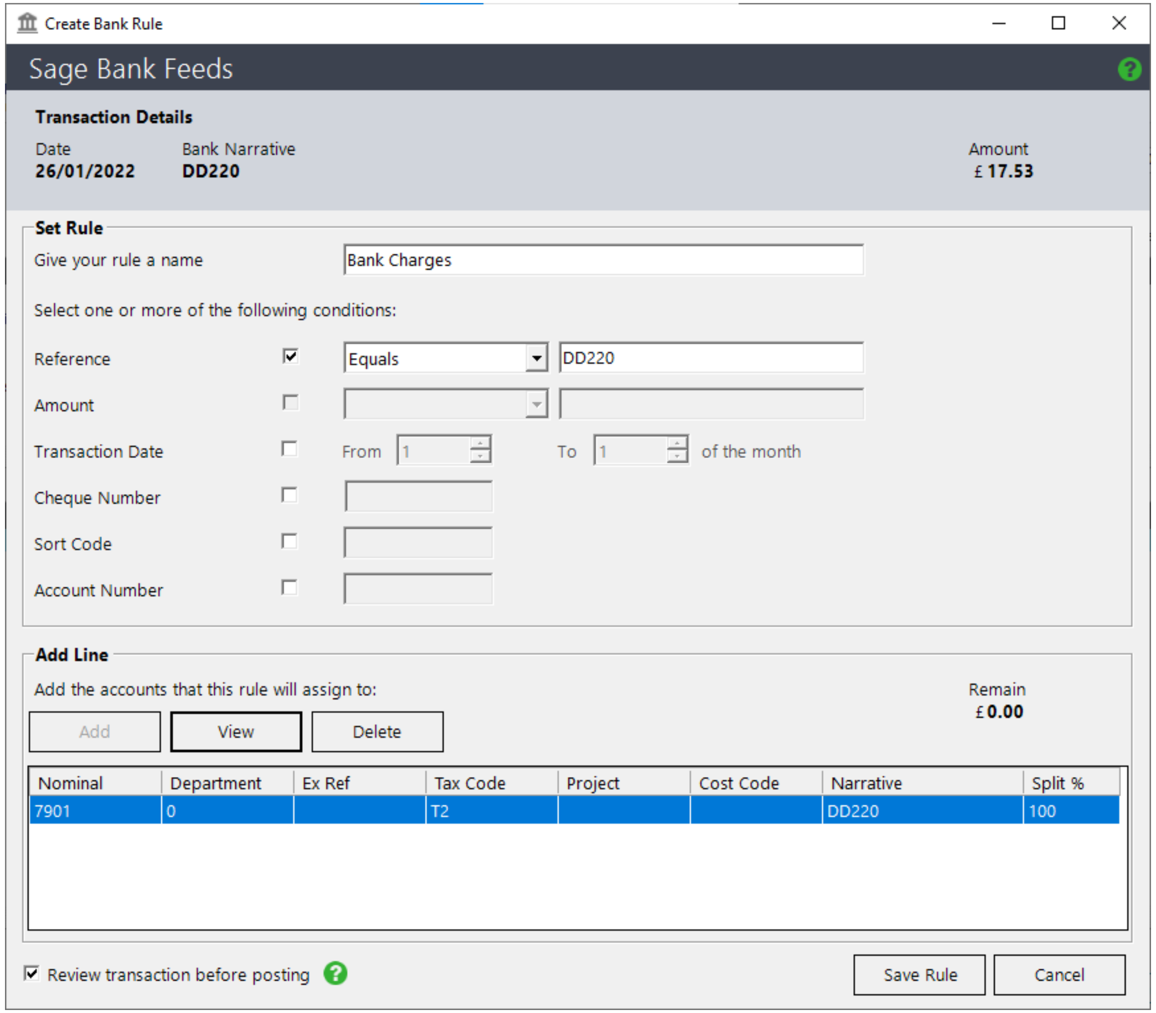


Rules.

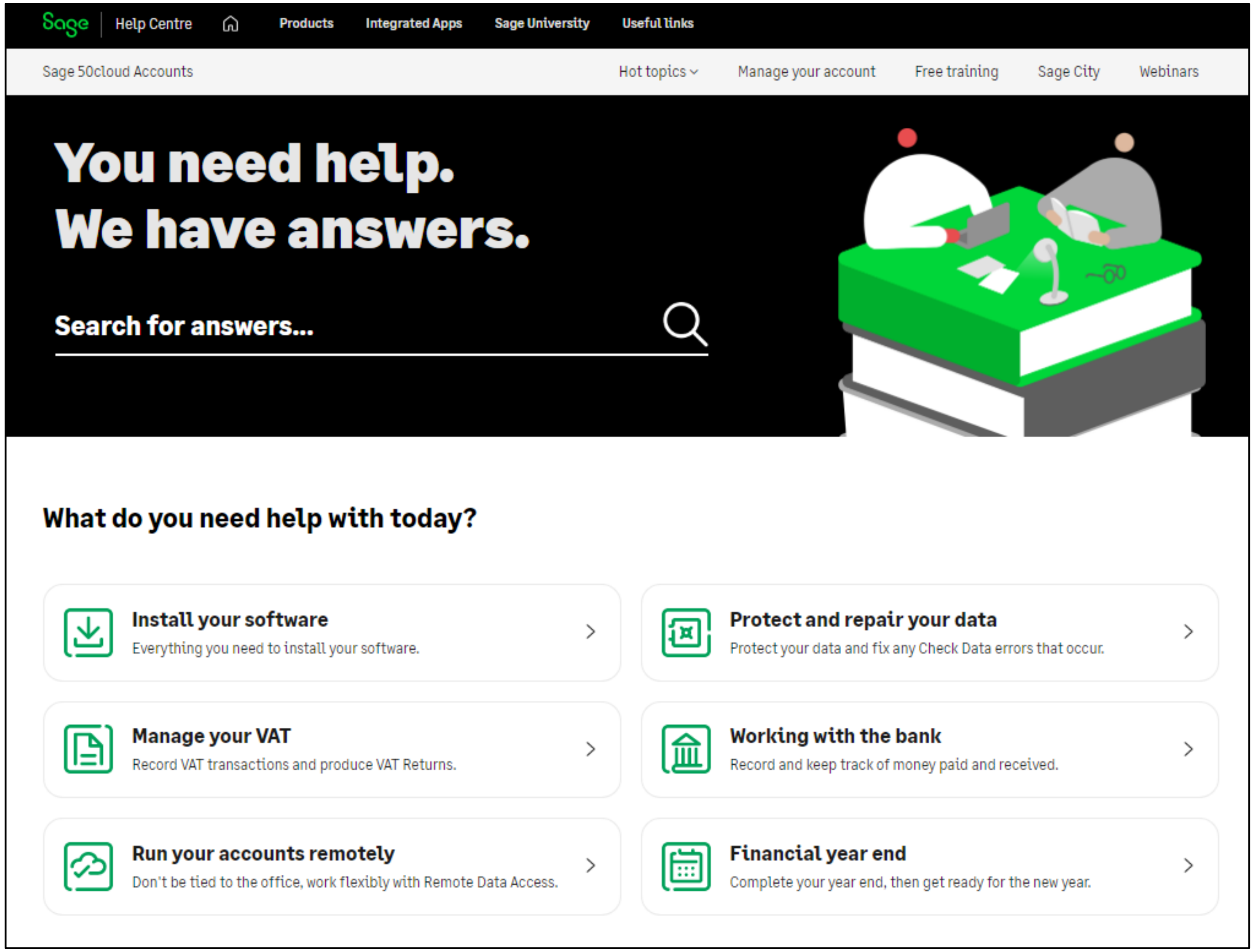
- Create rules based on your matched transactions.
- Assign nominal codes, tax codes, customers and suppliers.
- Transactions are automatically created straight from your bank.



Help Centre

www.sage.co.uk/help

- Search our knowledgebase
- Support guides
- Videos
- Get in touch



Upcoming Webinars

Upcoming	Key Topics	
What's new in v29 *loads of dates available* Year End Backing up your data **March sessions available soon**	**Emailing documents** Join our sessions to learn how to email your documents from Sage 50 Accounts.	
	Emailing Statements Recording available **Advanced** Wed 15 Feb 2pm	**Emailing Invoices** Recording available **Advanced** Wed 22 Feb 2pm

Thank you!

Please take a minute to complete the short exit survey as you leave.

You'll receive a follow-up email with links to register for future webinars and watch recordings later today.