





SF 360 Smart Matching



Agenda

- Introduction
- What is Smart Matching?
- Data Input
- Demonstration
- Matching Rules



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What is Smart Matching?

bit.ly/SF360Smart



“Smart Post” technology

- Pattern learning
- Confidence indicators
- Automate the manual



Re-engineer Existing Automation

- Dividend and Distributions
- BGL Contract Notes
- Existing and New Rules



Bulk Processing

- Quick coding capabilities
- Common transaction recognition
- Reduce the Mundane



Rule Transparency

- Review rules before applying to transactions
- Increase rule effectiveness



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Data Input

- Quickly record bank transactions into the Fast Data Input screen
- Upload data where a feed has not yet been activated or able to be used for a bank
- Copy and paste from Excel, Sheets and Numbers

Data Entry - Spreadsheet					
	DATE	+ DEBIT	Swap Dtl/Cr	- CREDIT	DESCRIPTION
1	01/07/2017			0.01	Interest Received Example
2	30/06/2018		0.02		Bank Charges Example



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Smart Matching Demonstration

- View up to 4x more transactions on screen;
- Introduce the new filter and sort functions;
- Confidence Indicators and "Recognised" transactions;
- Improved chart account selector;
- Matching Rules and the "Review Before Apply" option.



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Resources

BGL Community (bit.ly/BGLCommunity)

- Smart Matching Help: bit.ly/SF360Smart
- Trustee Query: bit.ly/SF360TrusteeQuery
- Fast Data Input (Cash Code): bit.ly/SF360FastData
- AI Assistant: bit.ly/SF360AIAssistant
- BGL Bank Data Service: bit.ly/SF360BankData
- CSV Import: bit.ly/SF360CSV



Thanks for attending