Bank Rules

English

The **Bank Rules** feature in Manager.io, accessible via the **Settings** tab, is designed to automate the categorization of your bank transactions efficiently. This powerful tool allows you to set specific conditions that automatically associate certain transactions with predefined accounts.



Payment Rules

Use **Payment Rules** to automatically categorize outflows of money (Payments). This helps in quickly organizing expenses and other cash outflows. By setting up these rules, you can streamline your expense tracking and reduce manual data entry.

See Payment Rules for more information.

Receipt Rules

Receipt Rules apply to inflows of money (Receipts). Setting up receipt rules is crucial for accurately tracking sales and other income. These rules ensure that incoming funds are correctly allocated to the appropriate income accounts.

See Receipt Rules for more information.

By utilizing the **Bank Rules**, you can significantly enhance your bookkeeping, allowing you more time to focus on other aspects of your business.