



## 1. What are bank feeds?

A bank feed is a secure online connection between your Sage package and your bank to ensure seamless transfer of financial transaction history to your Sage package. We use secure online connections to transmit bank financial transaction history to your Sage package.

## 2. How does it work?

A bank feed automatically imports transaction history details from your bank into your accounting package, thereby eliminating the need to manually capture transactions or import transactions from a downloaded file.

Once a bank feed has been set up, your transaction history will be automatically imported into your Sage package at regular intervals thus enabling you to have latest transaction history to perform bookkeeping.

A bank feed only needs to be set up once and the automatic transfer of your transaction history will continue until you unsubscribe from this service.

## 3. How can it help me/my business?

**Saves you time and reduces the risk of human error:** you no longer need to manually capture or import transaction history from your bank account/s and upload it into your Sage package.

**Cost Effective:** your bank feed is a free, automated service that transmit your transaction history directly into your Sage package.

**Security:** transactions are securely transmitted between FNB and Sage.

**Efficiency:** the bank feed only needs to be set up once and the transaction history will be automatically transferred into your Sage package at regular intervals, significantly reducing the time spent on manual capturing or importing of files.

## 4. How secure are bank feeds?

Bank feeds use your consent for your Sage package to collect bank transactions. FNB and Sage ensure that your data is transmitted safely and securely by using systems which are audited regularly to ensure that they comply with industry standards.

## 5. How do I set up my connection to Sage?

You need to have an active subscription to a Sage package. If you do not have one, please visit the Sage website to sign up for the package most suited to your needs and follow steps on point 8 below.

## 6. Can I add other accounting packages i.e. Xero?

The bank feeds solution is currently limited to Sage packages.

## 7. What are the costs?

The bank feed service is free however your normal banking fees will still apply.

## 8. How do I connect my accounts?

Please refer to the steps below for assistance.

### How to connect an account to a Bank Feed

- Log in to your FNB App
- Select Business Solutions > Bank Feeds
- Select '<' button
- Select the 'Connect' button for Sage
- Complete 'Bank Feeds'
  - By selecting the account/s you would like to integrate into Sage and select 'Continue'
  - An authorisation code will be generated. You will be required to capture this authorisation code onto Sage to complete the set up and link your account. Please note, the code will be valid for 30 minutes after which you will need to generate a new code
- Setup is now complete

## 9. How do I remove a partner from a bank feed?

Please refer to the steps below for assistance.

### How to remove an account from a bank feed

- Log in to FNB App
- Follow this path: Business Solutions > Bank Feeds
- Slide the orange arrow to the left to expose options for Sage
- Select the 'Remove' button: that's next to Sage
- Confirm Remove
- Your removal is now complete

## 10. When and how often will my bank feeds update?

The frequency of bank feeds between the bank and Sage is determined by your Sage package.

## 11. How do I check if my feeds are working?

When the status for bank feeds reflects as 'connected' there will be an active bank feed between your FNB account and your Sage package. Should the bank feeds status reflect as 'connected' and your transactions are not appearing on the financial transaction history, please contact Sage support on 011 304 1000 for assistance.

## 12. I'm an accountant, can I set up bank feeds on my client's behalf?

If you have been allocated permission as an authorised representative or as an administrator, you will be able to set up the bank feeds solution on behalf of the client via Business Solutions > Bank Feeds.

## 13. I did not receive my authorisation code, how do I get a new code?

### We recommend you check the following:

1. WiFi/data is on
2. Select Business Solutions > Bank Feeds

Tap on the 'New Code' button next to Sage icon

## 14. My code has expired; how do I get a new code?

Please refer to the steps below for assistance.

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  - Select the account/s you would like to integrate into Sage and select 'Continue'
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- Setup is now complete

For any queries, please contact the FNB Digital Banking Contact Centre on 087 575 0000.

Terms and conditions apply.

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