Standard Bank

BANK FEEDS

STANDARD BANK'S

EASY AID GUIDE

IN PARTNERSHIP WITH Sage

INTRODUCTION

Business customers can now seamlessly connect their Standard Bank transactional account to automatically transfer their transaction history into the Sage Accounting software, thereby eliminating the need for manual data entries whilst enhancing the data security of their banking profile.
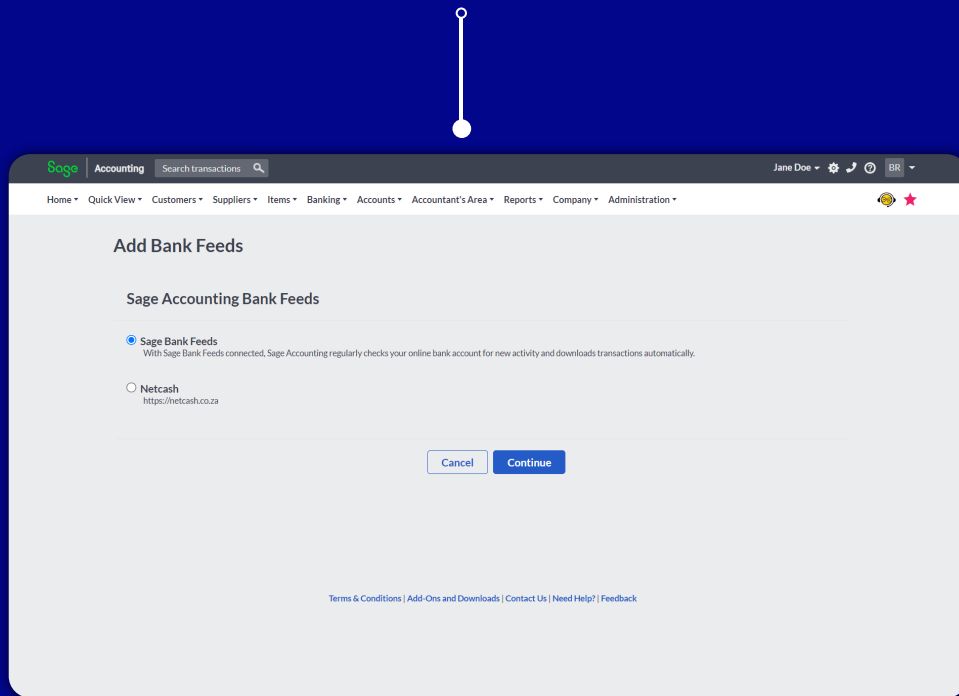
GETTING STARTED

Step 1

To add Standard Bank Direct Bank Feeds, log onto the **Sage Accounting** platform and go to **Banking** > **Transactions** > **Manage Bank Feeds**
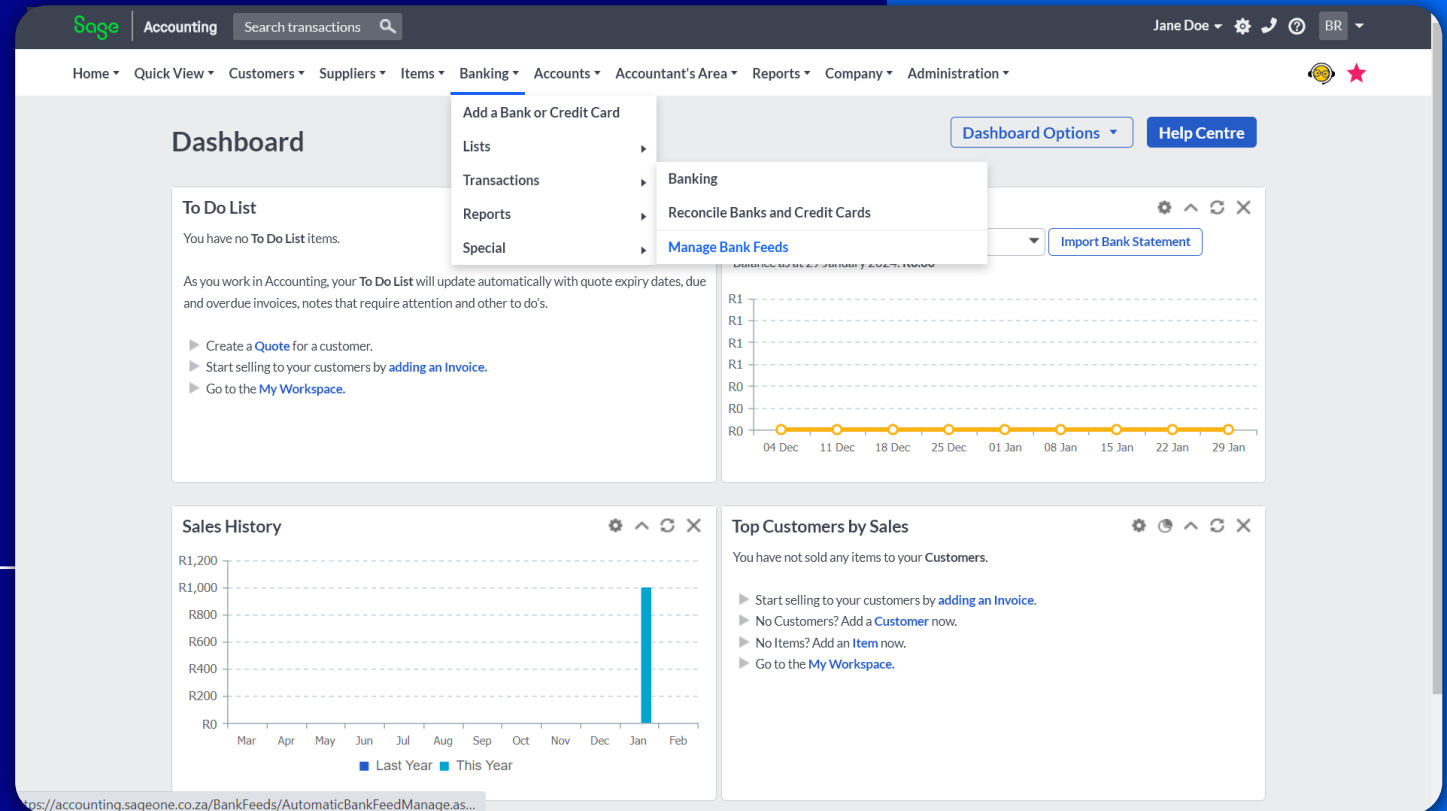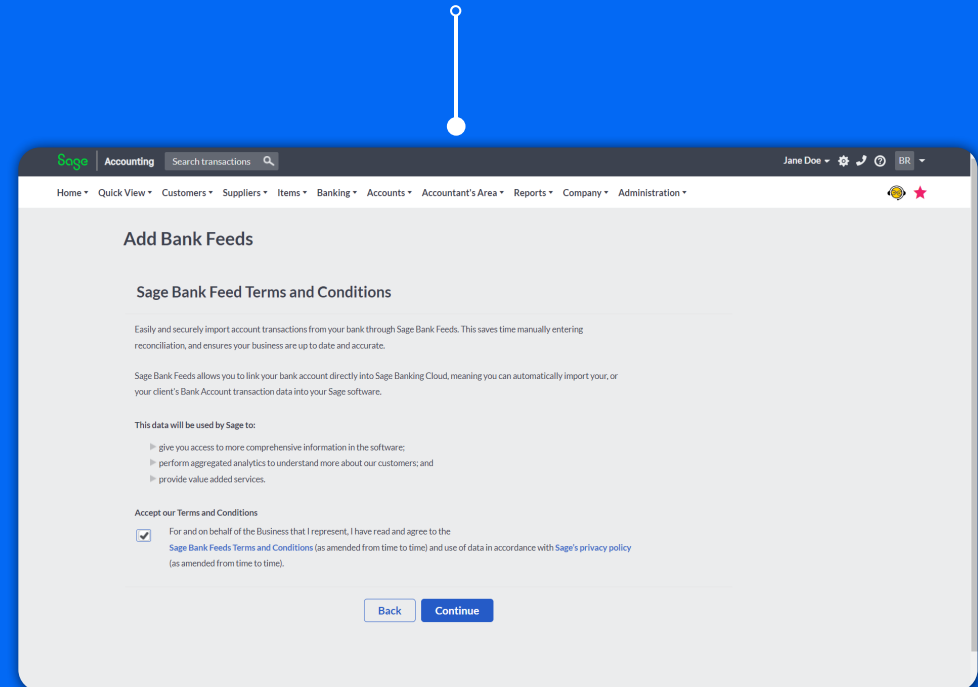
Step 2
Select Sage Bank Feeds and click "**Continue**".

Step 3
Accept the Sage Bank Feeds Terms and Conditions and click on **"Continue".**

3

Step 4

Search for **"Standard Bank"** and click on the search result.

Connect your bank

Reduce labor-intensive data entry by connecting Sage to your online bank. We'll automatically check for new transactions on a daily schedule and download them as soon as possible.

Find your bank

Or choose from these banks

Standard Bank (Connection powered by Sage)

Step 5

Review Standard Bank's requirements to set up a Bank Feed successfully and click **"Continue"**.

Home ▾ Quick View ▾ Customers ▾ Suppliers ▾ Items ▾ Banking ▾ Accounts ▾ Accountant's Area ▾ Reports ▾ Company ▾ Administration ▾

Add Bank Feeds

Standard Bank (Connection powered by Sage) (Beta)
https://openbanking.standardbank.co.za
We will connect directly to your bank, or through our secure partner. We can then download your bank transactions.
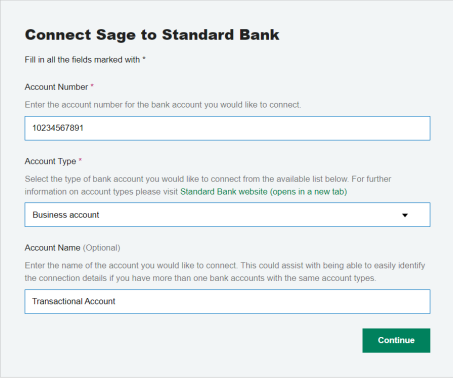
What's needed to connect?

- Have your sign-in credentials on hand for when you're asked to sign into your bank.
  Note: For security reasons, you'll be periodically prompted to sign into your bank account.
- Be prepared to enter the start date for downloading transactions. Some banks limit this start date to the last 90 days.

Back   Continue

Step 6

Fill in the required information to connect the Standard Bank account to Sage, then **click "Continue"** to be redirected to Standard Bank for authentication.

Connect Sage to Standard Bank
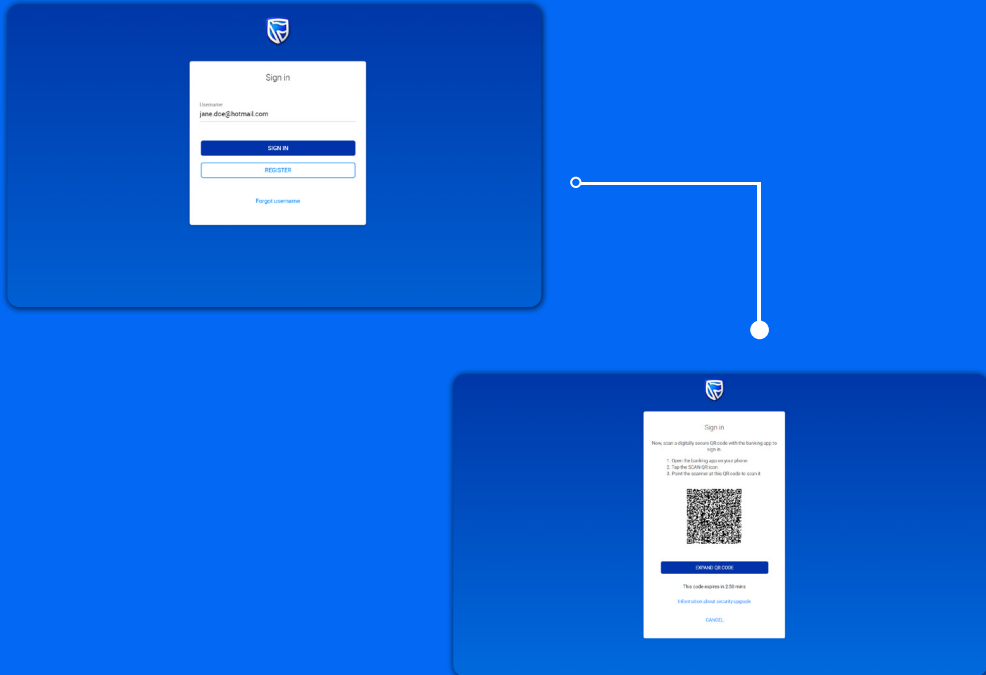
Fill in all the fields marked with *

Account Number *
Enter the account number for the bank account you would like to connect.

10234567891

Account Type *
Select the type of bank account you would like to connect from the available list below. For further information on account types please visit Standard Bank website (opens in a new tab)

Business account ▼

Account Name (Optional)
Enter the name of the account you would like to connect. This could assist with being able to easily identify the connection details if you have more than one bank accounts with the same account types.

Transactional Account

Continue

Step 7

Authenticate yourself using your secure digital profile

Sign in

Username
jane.doe@hotmail.com

SIGN IN

REGISTER

Forgot username

Sign in

Now, scan a digitally secure QR code with the banking app to sign in.

1. Open the banking app on your phone
2. Tap the SCAN QR icon.
3. Point the scanner at this QR code to scan it
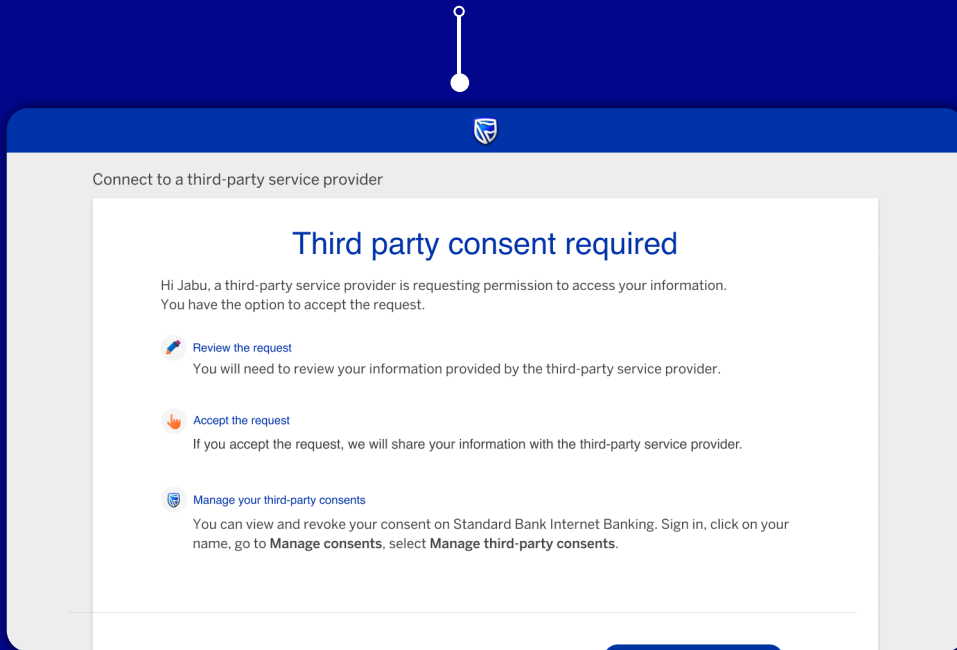
OBTAIN QR CODE

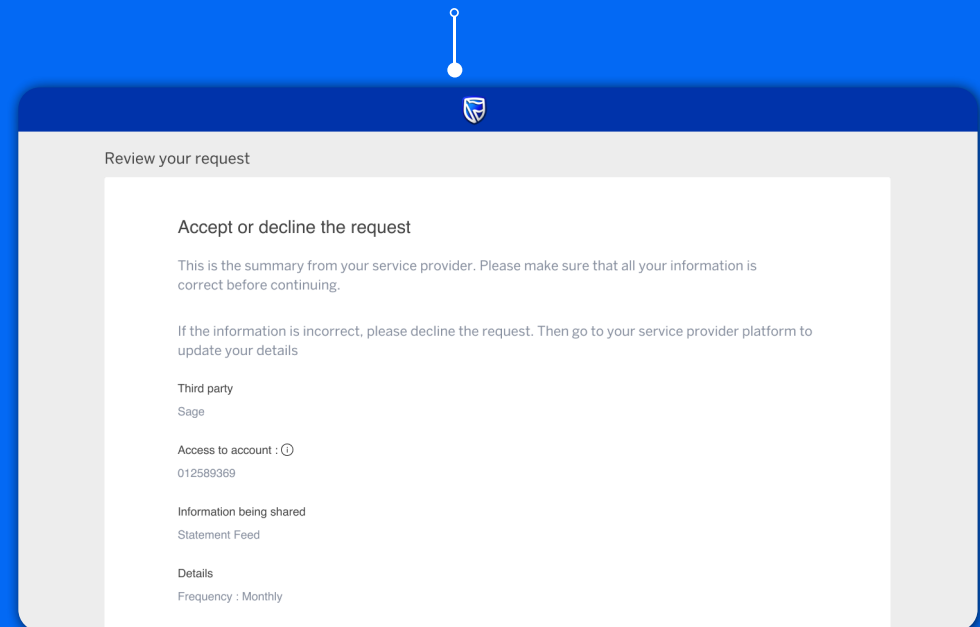This code expires in 2:59 mins

Information about security upgrade

CANCEL

Step 8
Review steps to give consent for Standard Bank to share your account transaction history with Sage and click **"Get Started"**.

Connect to a third-party service provider

Third party consent required

Hi Jabu, a third-party service provider is requesting permission to access your information. You have the option to accept the request.

Review the request
You will need to review your information provided by the third-party service provider.

Accept the request
If you accept the request, we will share your information with the third-party service provider.

Manage your third-party consents
You can view and revoke your consent on Standard Bank Internet Banking. Sign in, click on your name, go to **Manage consents**, select **Manage third-party consents**.
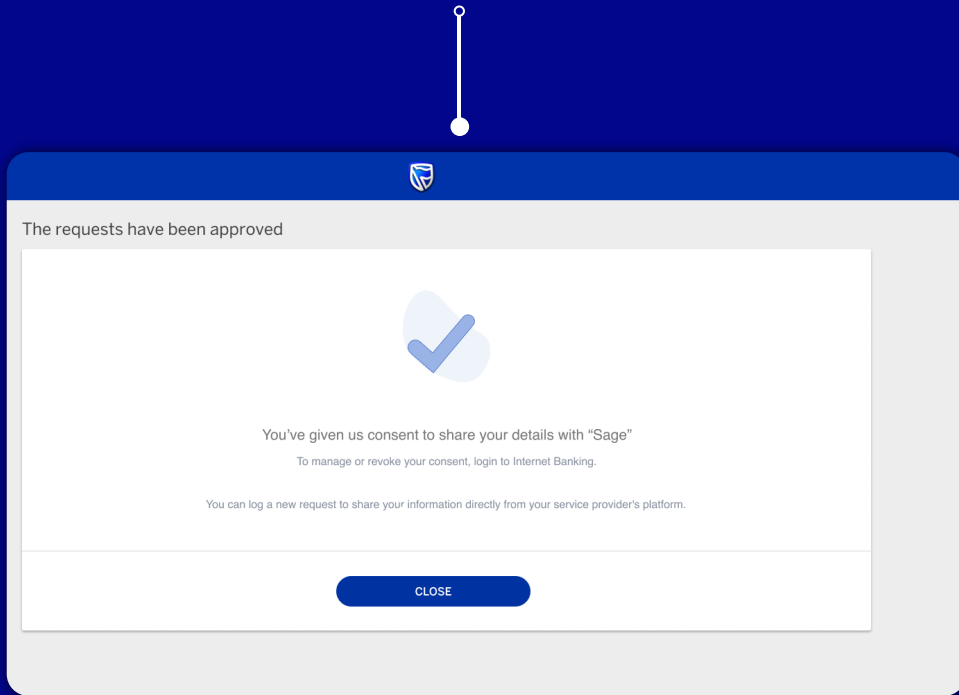
Step 9
Review the third-party access request details **(request to provide consent)** to the third-party **(Sage),** accept the third-party access **(consent)** Terms & Conditions and click **"Accept"**.

Review your request

Accept or decline the request

This is the summary from your service provider. Please make sure that all your information is correct before continuing.

If the information is incorrect, please decline the request. Then go to your service provider platform to update your details

Third party
Sage

Access to account : ⓘ
012589369

Information being shared
Statement Feed

Details
Frequency : Monthly

Step 10

Complete Standard Bank consent provision, then click **"Close"** to be redirected back to Sage

The requests have been approved

You've given us consent to share your details with "Sage"

To manage or revoke your consent, login to Internet Banking.

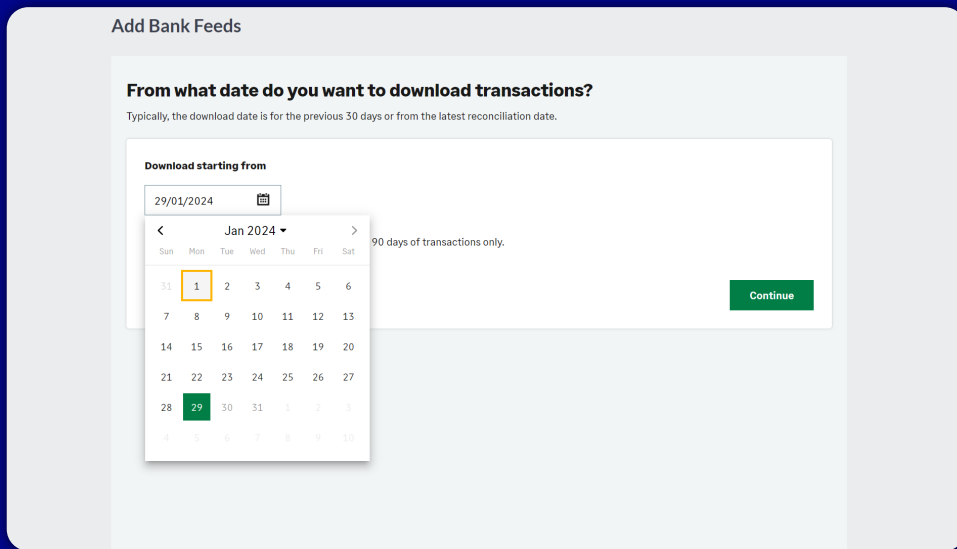You can log a new request to share your information directly from your service provider's platform.

CLOSE

Step 11

Complete the Bank Feeds set-up by selecting the accont to be linked to the Standard Bank Feed and click **"Continue"**

Sage Bank Feeds supports more than one account associated with your online banking login. Select the bank account that you want to use.

○ business account (****9962)

○ My bank account isn't listed

OK
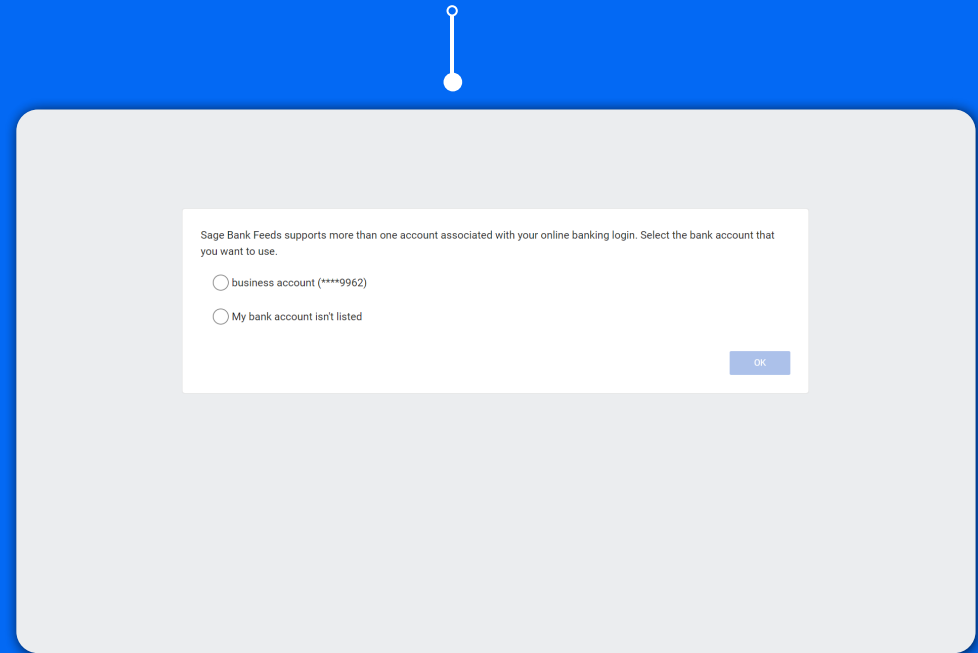
Step 12

Select the start date for downloading transaction data from your Standard Bank account, and click **"Continue"**.

Add Bank Feeds

From what date do you want to download transactions?

Typically, the download date is for the previous 30 days or from the latest reconciliation date.

Download starting from

29/01/2024 📅

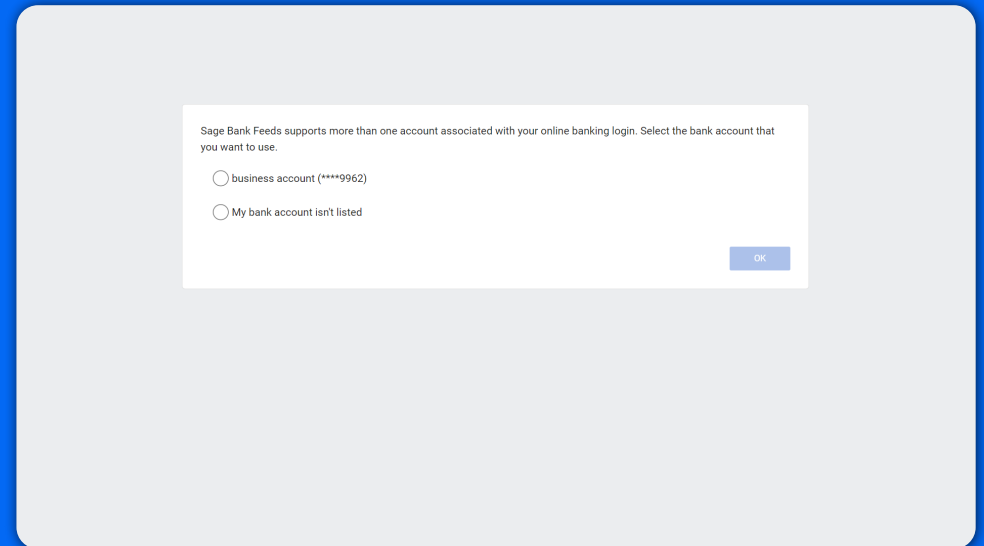| ‹		Jan 2024 ▾				›
Sun	Mon	Tue	Wed	Thu	Fri	Sat
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

90 days of transactions only.

Continue

Step 13

Enter the Sage Accounting Bank Account that will be linked to your Standard Bank Transactional Account.

If you already have a bank account set up in your Sage Business Cloud Accounting, choose '**Existing Bank Account**,' select from the dropdown menu, and then click '**Save**'.

Sage Bank Feeds supports more than one account associated with your online banking login. Select the bank account that you want to use.

○ business account (****9962)

○ My bank account isn't listed

OK

THANK YOU