Connect your bank to Claify

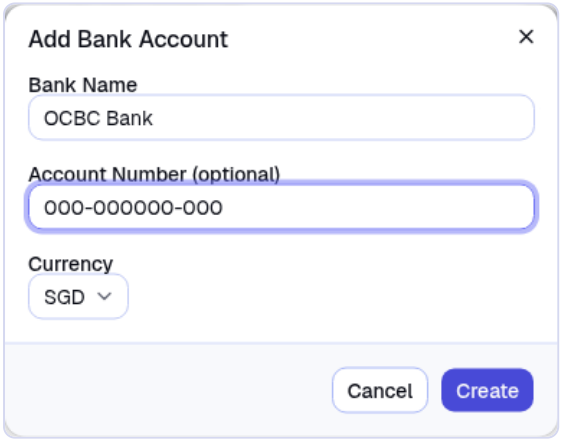
Get bank transactions into Claify so they can be matched to invoices and bills. There are two ways: a **live bank feed**, or a **CSV statement upload**. CSV works with every bank.

	Live feed	CSV import
OCBC	Sign in with your business internet banking login	Yes
DBS	Shows "In progress" until direct sign-in is available for your organisation	Yes
UOB	Needs company API credentials from UOB (see section 3)	Yes
Any other bank	Not available	Yes

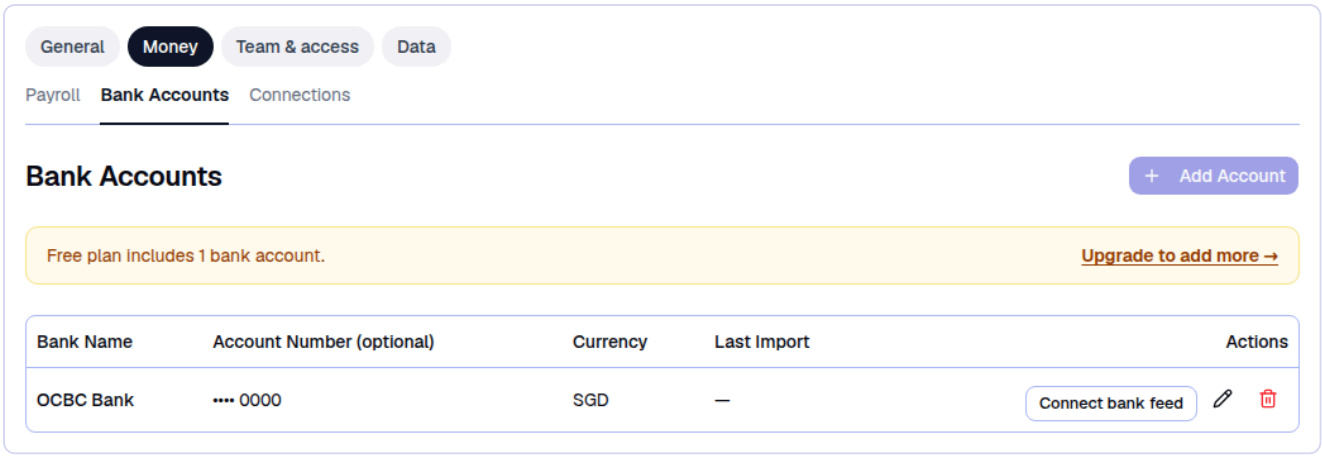
You need: owner access to your Claify organisation. The Free plan includes one bank account. **Time:** 10 minutes.

1. Add the bank account in Claify

Go to **Settings** → **Money** → **Bank Accounts** and click **Add Account**. Enter the bank name, the account number (optional) and the currency.

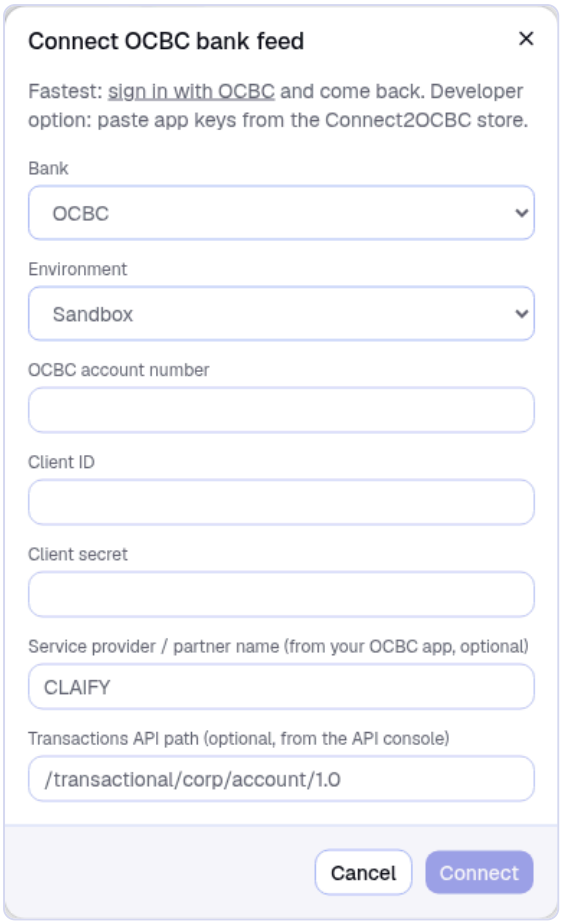


Claify stores the account number encrypted and shows only the last four digits.



2. Connect a live feed: OCBC

1. Go to **Settings** → **Money** → **Connections**. Under **Bank accounts**, click **Connect an OCBC business account** (Sign in at OCBC).
2. You are sent to OCBC's own page. Sign in with your business internet banking login. Claify never sees your password. Pick the account and come back.
3. Go to **Bank Accounts** and click **Connect bank feed** on the account.
4. In the dialog leave **Bank: OCBC**, tick **Use my connected OCBC login (recommended)**, and enter the OCBC account number. Choose **Production** for your real account. **Sandbox** is OCBC's test environment. Leave the Client ID, Client secret and API path fields blank; they are for developers.
5. Click **Connect**, then **Sync now**. Claify pulls the last 30 days.



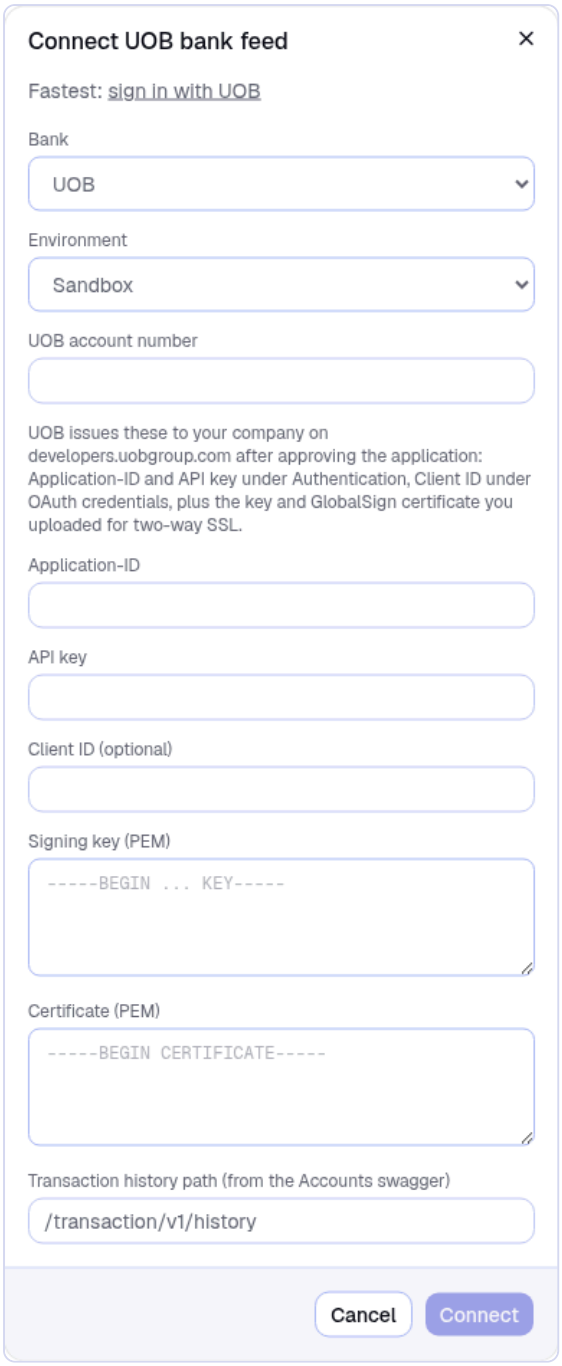
After that Claify syncs again every night (around 2 am Singapore time). Each sync tells you how many transactions were fetched, how many were new, how many were already there, and how many matched to invoices or bills.

When the session expires: OCBC's sign-in lasts about an hour. When it expires, **Sync now** sends you back to OCBC for a quick sign-in and then syncs straight away. To reconnect from the start, use **Reconnect** on the Connections page.

3. DBS and UOB

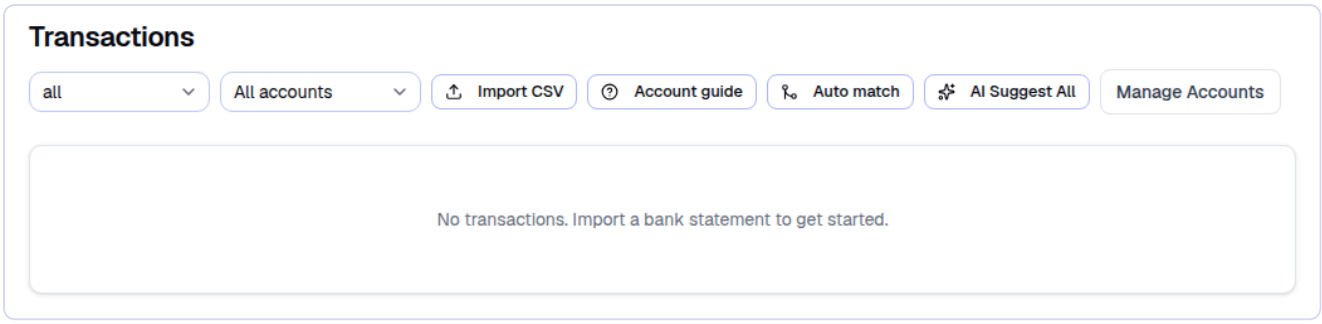
DBS. On the Connections page the DBS row shows **Sign in at DBS** when direct sign-in is available for your organisation. When it shows **In progress**, use the CSV import below. It takes about a minute a week.

UOB. UOB does not have a customer sign-in. A UOB feed uses credentials issued to your own company on the UOB developer portal after UOB approves your application. In **Connect bank feed** choose **UOB**, and enter the account number, Application-ID, API key, Client ID (optional), signing key (PEM), certificate (PEM) and the transaction history path. Most companies without a UOB developer account should use the CSV import.



4. Any bank: import a CSV statement

1. In your bank's internet banking, export transactions as **CSV**.
2. In Claify, go to **Transactions** → **Import CSV**. Choose the bank account and the file.
3. DBS, OCBC and UOB CSV layouts are recognised automatically. AI categorises each line and Claify matches it to open invoices and bills.



5. Reconcile

- **Transactions** lists every bank line with its match. Use **Auto match** to run matching again, and **AI Suggest All** for categories.
- Lines unmatched for more than 30 days, and possible duplicates, appear under **Need attention**.
- Confirm or correct each one, then run **Reports** → **Bank Reconciliation**.

If something goes wrong

- **Sync failed / session expired:** click **Sync now** again, or **Reconnect** on the Connections page.
- **Feed not available for my bank:** use the CSV import.
- **The same line twice:** re-importing a period is safe. Lines already in Claify are skipped.
- **Remove a feed: Disconnect** on the bank account. Transactions already imported stay.

Need a hand? Use **Contact support** in the Claify sidebar, or email support@claify.homeauto.sg.
