

# How to connect your bank feed



A step by step walkthrough for Mazuma clients. Connecting takes just a few minutes, and this guide covers every screen.

6 steps

A few minutes

No more bank statements

## YOUR MONEY STAYS YOURS

Your bank feed is a secure connection that automatically sends your business bank transactions to your Mazuma accountant. **We never see or access your bank account. We can't log in and we can't move money.** The feed simply sends transaction data across, protected by bank grade encryption, so we can keep your bookkeeping accurate and up to date.

## Before you start

-  Use your **business bank account**, not a personal one.
-  Have your **account number and sort code** to hand.
-  Keep your **mobile banking app** nearby, as your bank will ask you to approve the connection.

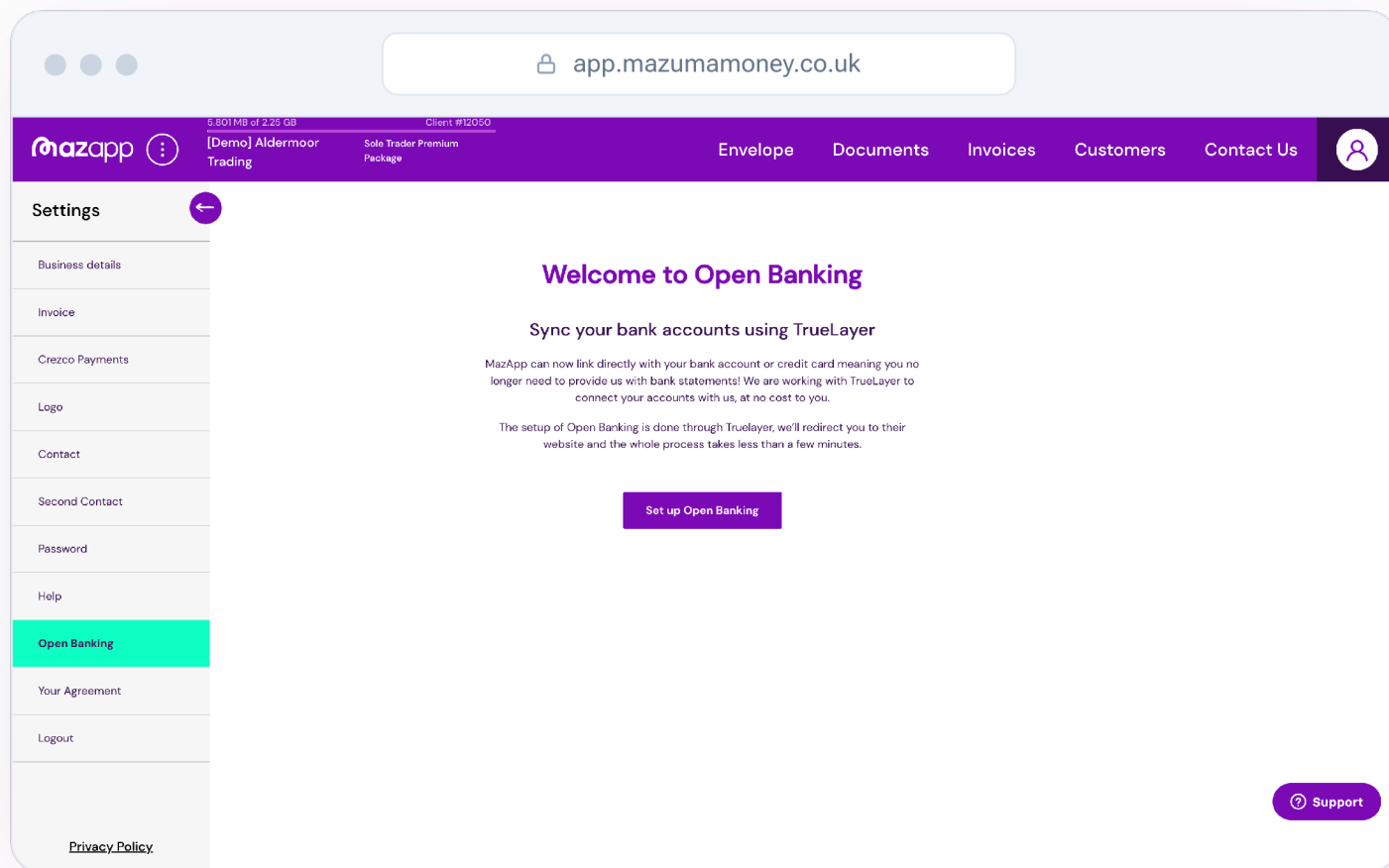


**One thing to know:** some screens in MazApp and at your bank mention Open Banking. That's just the name of the technology behind your bank feed. It's the same thing.

## 1

## Open the bank feed settings in MazApp

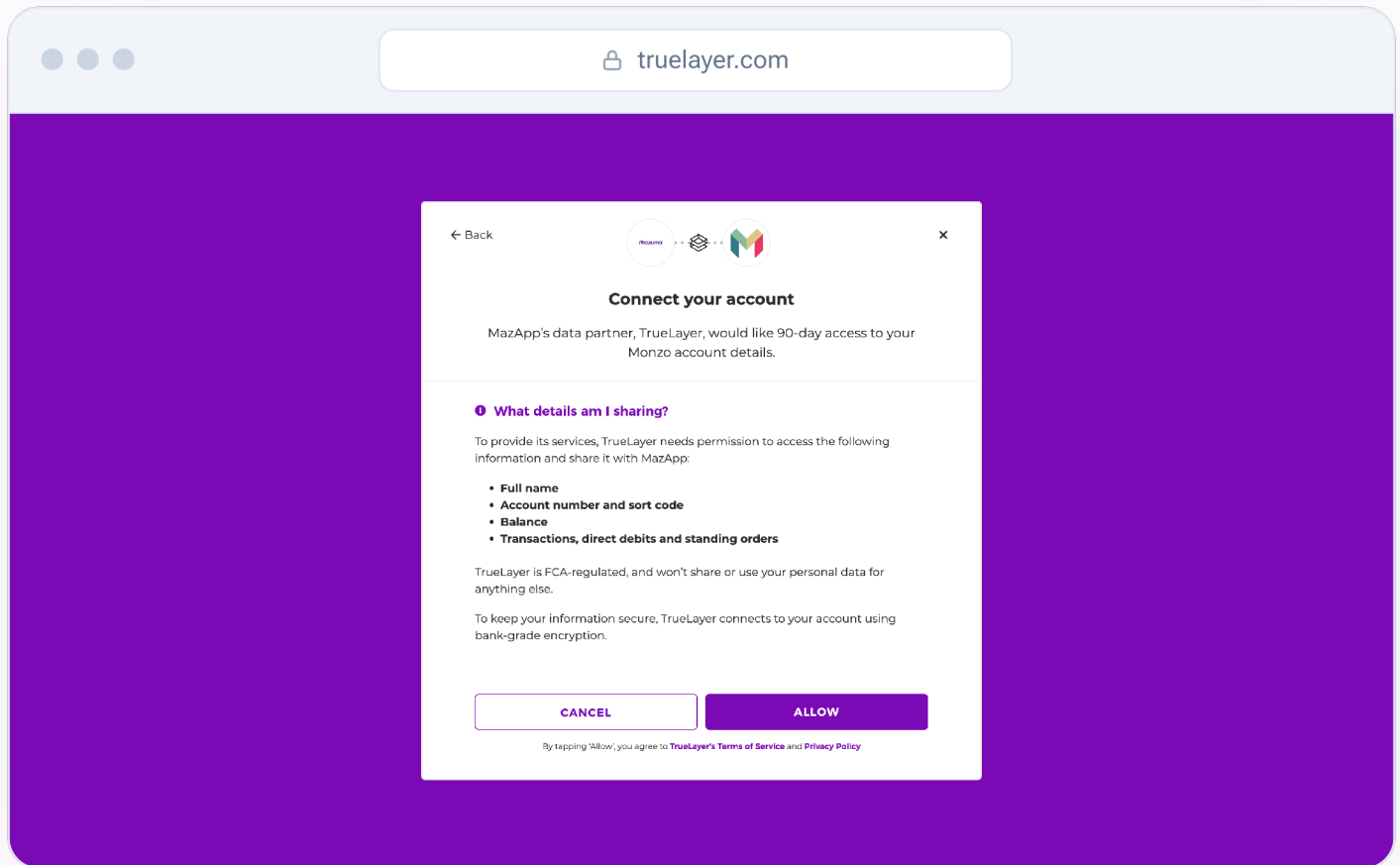
Log in to MazApp, go to **Settings**, then choose **Open Banking** from the menu on the left. Click **Set up Open Banking**.



## 2

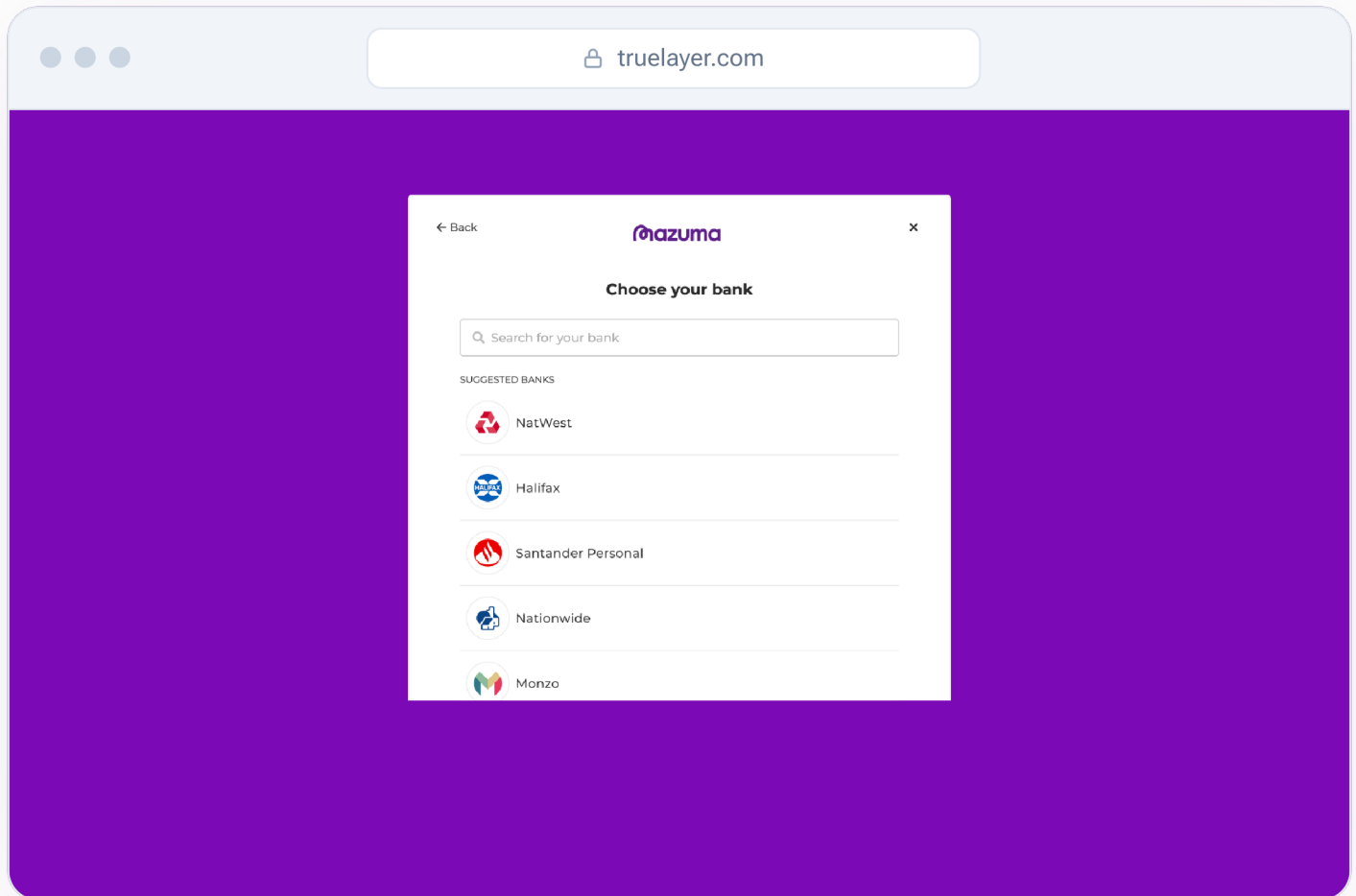
## Review and allow the connection

The connection is handled by **TrueLayer**, our FCA regulated data partner. This screen shows exactly what will be shared: your name, account number and sort code, balance, and transactions. Nothing more. When you're ready, click **Allow**.



### 3 Choose your bank

Search for your bank or pick it from the list. Remember to choose the bank that holds your **business account**.



## 4 Confirm your account details

Your bank will ask for a few details to identify your account. In this example, Monzo asks for the account number, sort code and email address. These details go **directly to your bank, not to Mazuma**. Enter them and click **Continue**.

your bank


**Set up account access**  
TrueLayer would like some access to your accounts. You'll need to verify yourself in the Monzo app.

Account Number of your Monzo account  
12345678

Sort Code of your Monzo account  
000000

Email address on your Monzo account

Continue

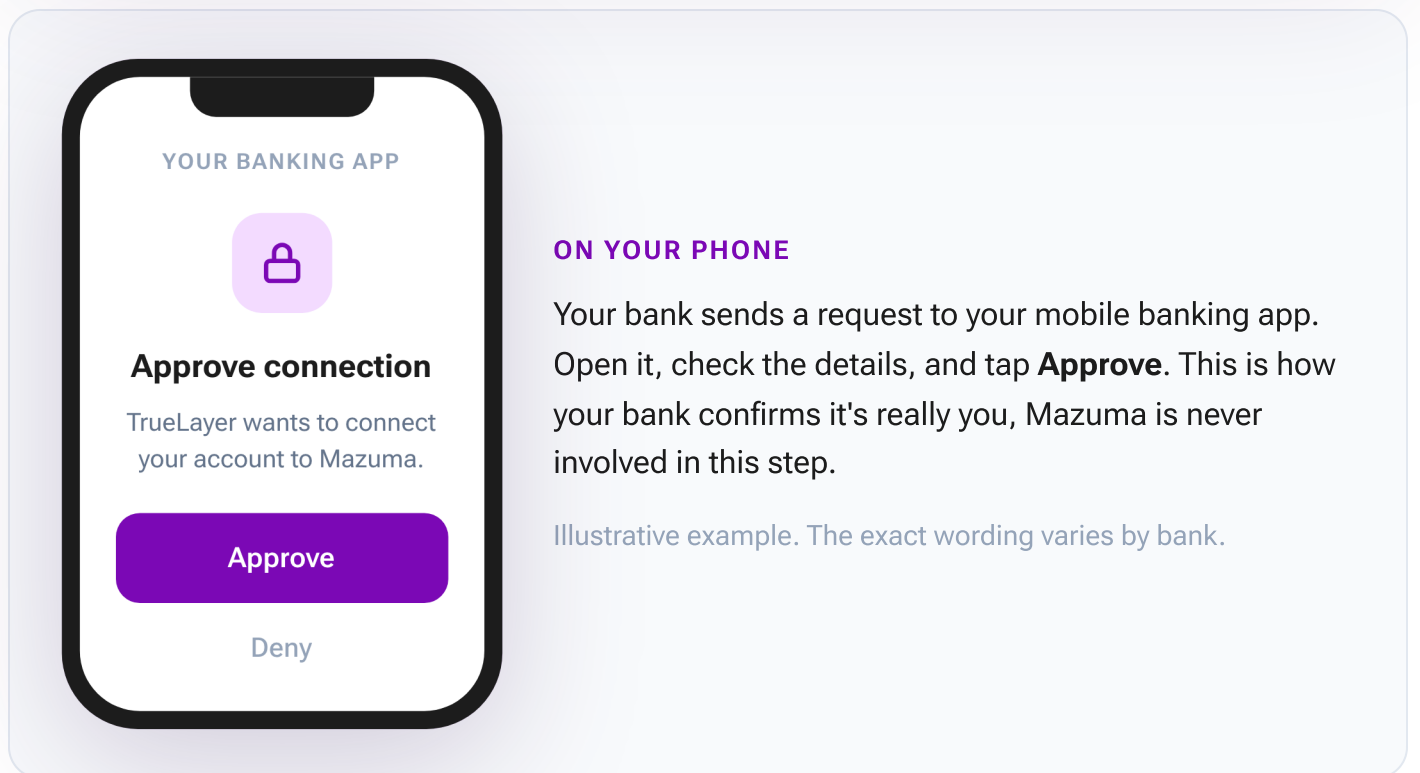
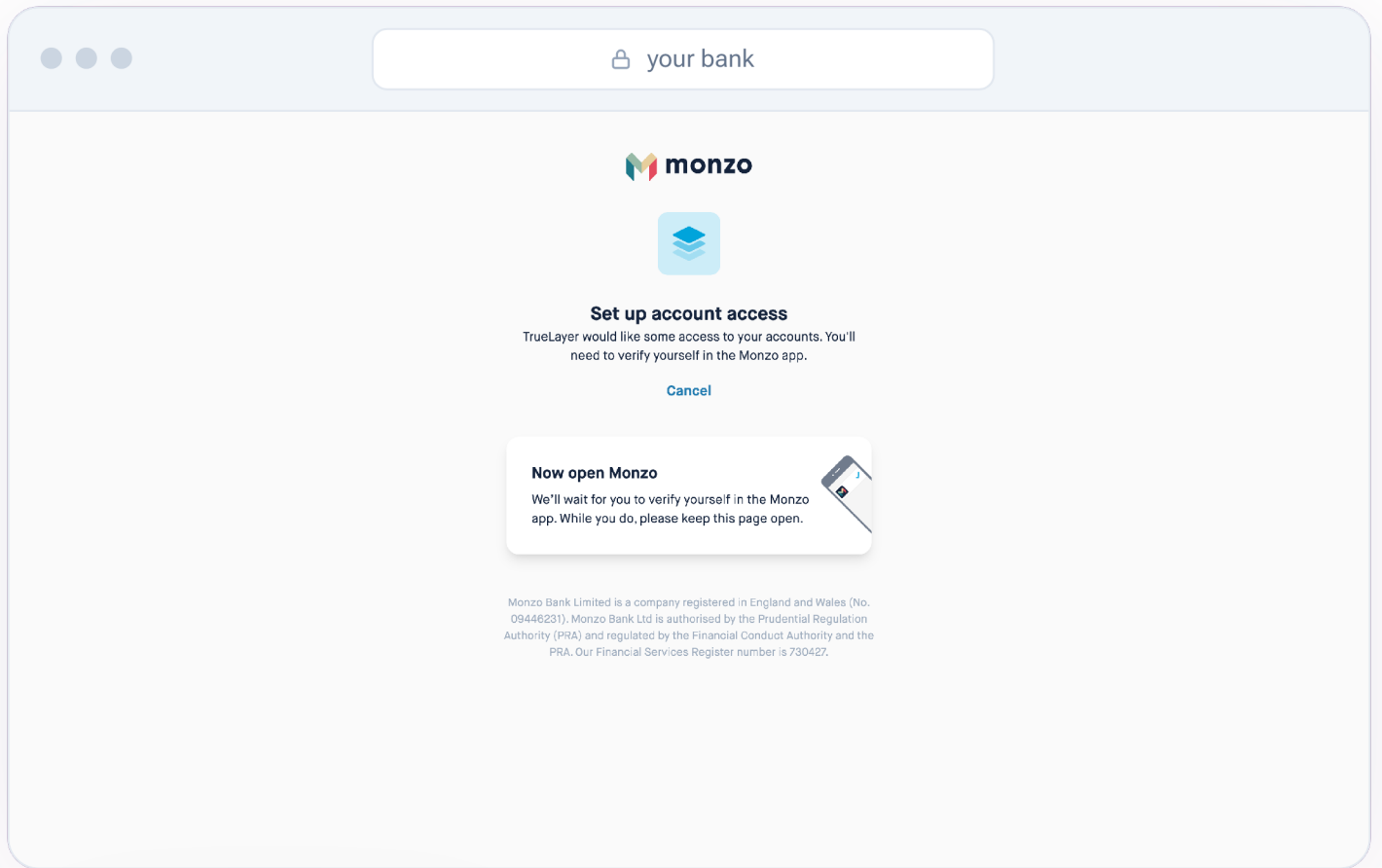
Cancel

Monzo Bank Limited is a company registered in England and Wales (No. 09446231). Monzo Bank Ltd is authorised by the Prudential Regulation Authority (PRA) and regulated by the Financial Conduct Authority and the PRA. Our Financial Services Register number is 730427.

5

## Approve the connection in your banking app

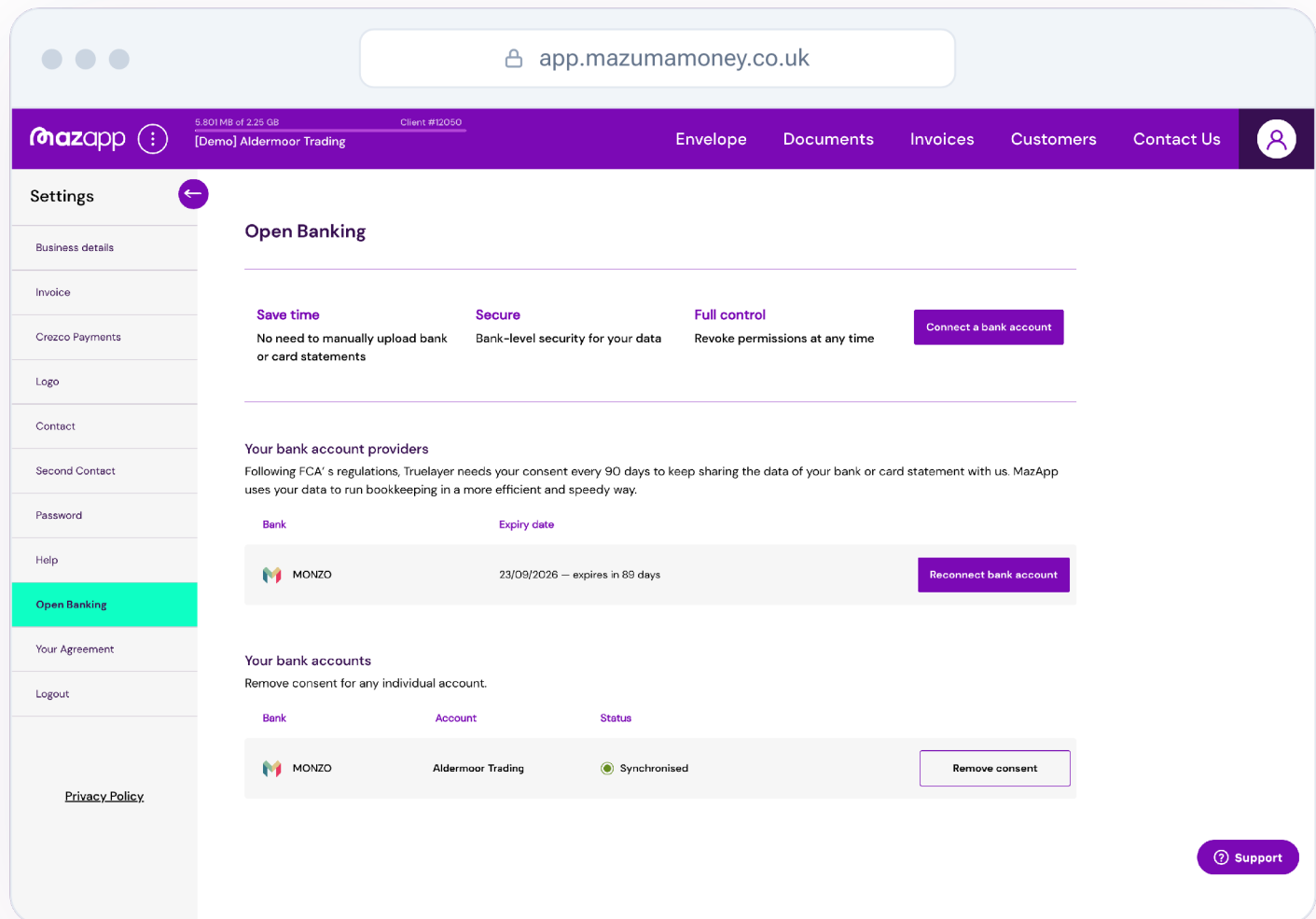
Keep this page open, then open your banking app on your phone and approve the request. Once you've done that, the page updates automatically.



## 6

## You're connected

Back in MazApp, you'll see your bank listed with the status **Synchronised**. That's it. Your transactions now flow through to your Mazuma accountant automatically.



## Keeping your feed connected



Under Financial Conduct Authority rules, your consent needs refreshing **every 90 days**. MazApp shows the expiry date on the Open Banking page, and reconnecting takes seconds: just click **Reconnect bank account** and approve it with your bank. We'll remind you when it's due.

## Need a hand?

If you get stuck at any point, we're happy to walk you through it. Get in touch and we'll get you connected.

[Get in touch →](#)