



Quick Start

From your bank file to "who paid" in five steps · version 1.0.1

- 1 Create your organization** at epayrecon.com/signup and choose its type (school, rental, childcare, sports, lessons, HOA, club, nonprofit, business or other) — the words and features follow.
- 2 Import your list** (People > Import a list): a CSV, Excel or PDF with names, groups and contacts' emails. Everyone gets a permanent account number such as EP-1042.
- 3 Tell payers their number:** print or email the "How to pay" notices. Numbers in memos make matching instant.
- 4 Upload your bank export** (Upload payments): CSV, Excel or a PDF statement. Check the columns once; your bank's layout is remembered.
- 5 Review and finalize:** accept the matches, approve or change the AI's suggestions, split, ignore or make rules — then Finalize to lock the list and run your reports.

Keyboard on the review screen

j / k	next / previous
a	accept (approve an AI suggestion)
e	choose someone else
s	split
r	rule for this payer
i	not a payment
u	undo

Good to know

- The AI only suggests; nothing is assigned until someone on your team approves it. Turn AI off in Settings.
- Roles: Owner, Admin, Staff, Viewer (view only).
- Everything personal is encrypted; every view and download is in the access log.
- Help: epayrecon.com/help · support@epayrecon.com