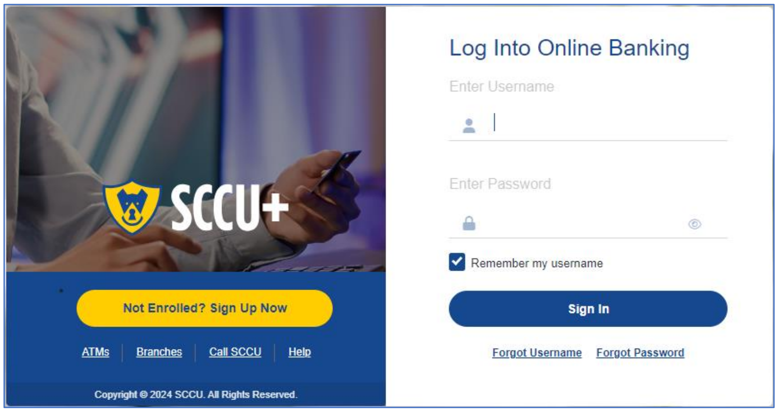
SCCU+ & Quicken Integration Guide Page 1

Quick Guide for Syncing Online Banking Transactions Manually

In this guide we hope to provide you a comprehensive set of instructions for manually syncing SCCU Online Banking transactions to Quicken.

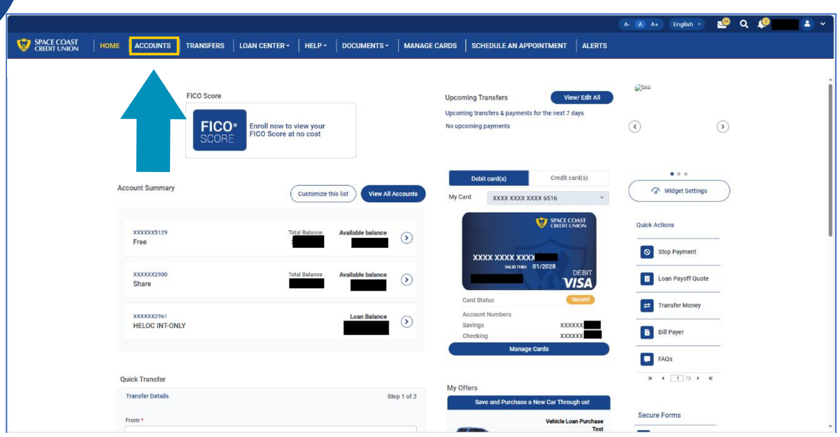
STEP 1



Log into Online Banking

To access your account, visit SCCU.com and click ‘Log In|Enroll’ at the top right corner of the screen. Enter your username and password, and then click ‘Sign In.’

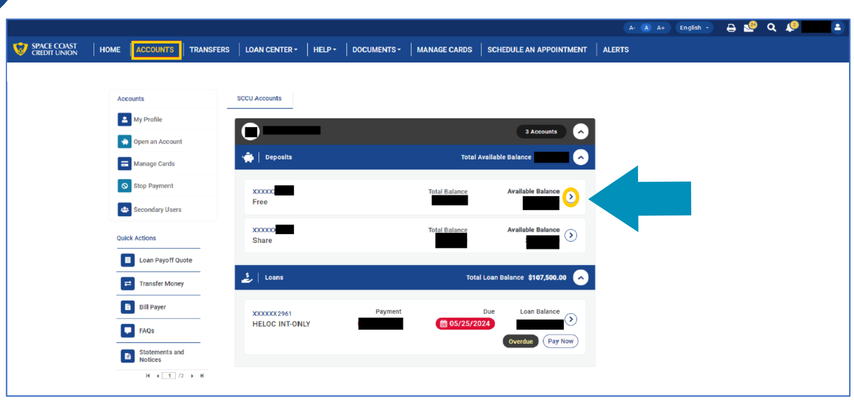
STEP 2



From The Home Dashboard

After logging in, select the ‘Accounts’ tab to view your account details.

STEP 3



Downloading the CSV File

Once you’ve clicked on the ‘Accounts’ tab, select the button to the right of the account deposits summary.

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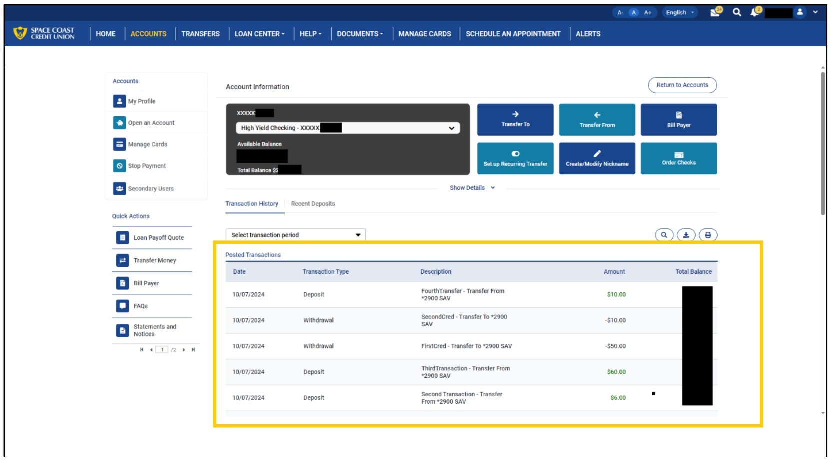
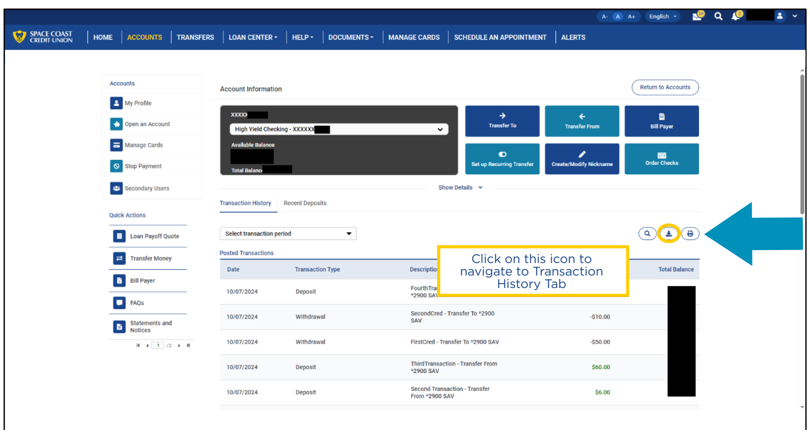
STEP 4



Posted Transaction History

After selecting an account, your transaction history will appear under the 'Posted Transactions' section.

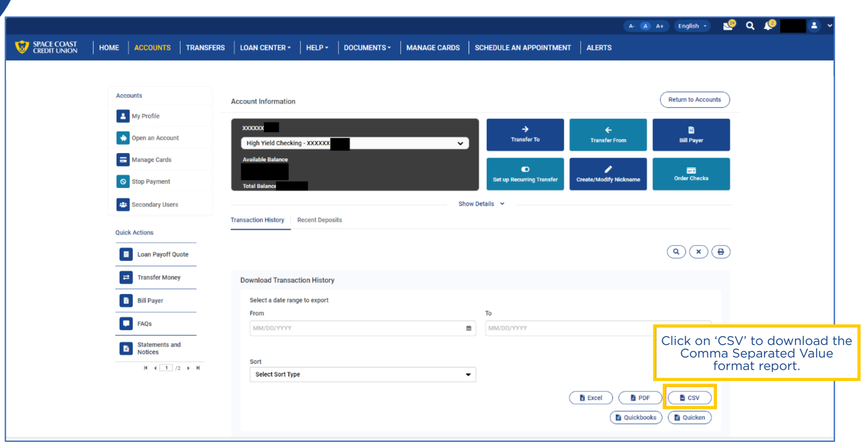
STEP 5



Download Your History

To download Transaction History data for a specific period, click the Export Transaction icon.

STEP 6



Ensuring Correct File Type

In the new tab that opens, input your desired From and To dates for the transaction history you wish to download and select the CSV button to download the file in CSV format.

Once you click 'CSV' the file will be downloaded to your PC and saved in the 'Downloads' folder.

After you've located the file, next steps will take place in the Quicken app.

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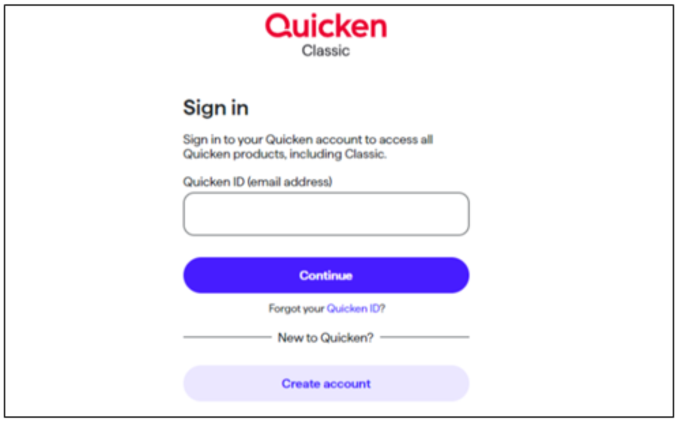
Sync Your Online Banking Transactions in Quicken

Now that you have your transactions file downloaded, we're going to move on to configuring that file in the Quicken Classic app.

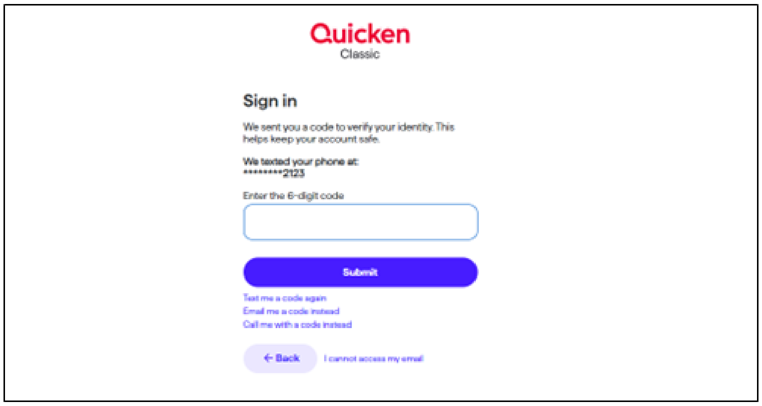
STEP 7



Log into Quicken

Open the INTUIT login page at **APP.QUICKEN.COM** and enter your username and password.

STEP 8



2-Factor Authentication

Before you can proceed, you'll need to verify the 6-digit code sent to your phone or email.

STEP 9

New Sign-On Prompt

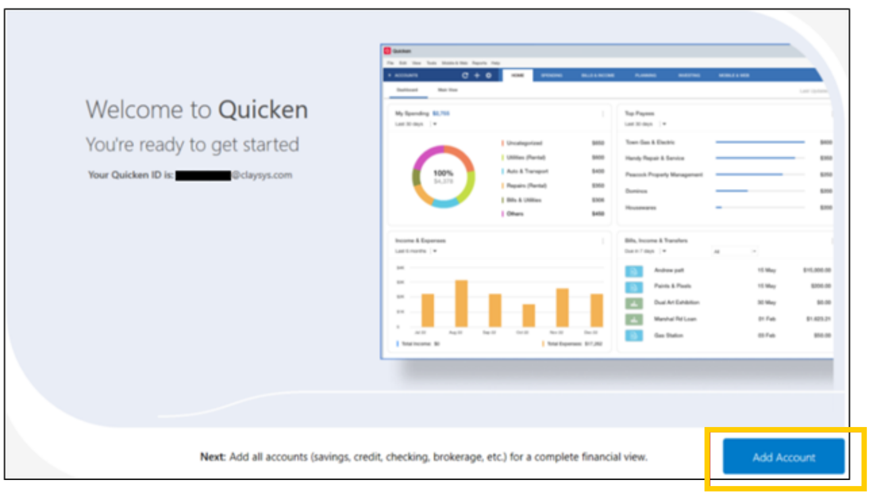
Quicken will prompt you to indicate whether you're new to the application or an existing user. You can skip to step 13 if you already have an account.

STEP 10

Syncing Data to Mobile/Web

You have the option to sync your data to Mobile & Web using a toggle switch. Enable or disable this feature as needed, then click 'Next.'

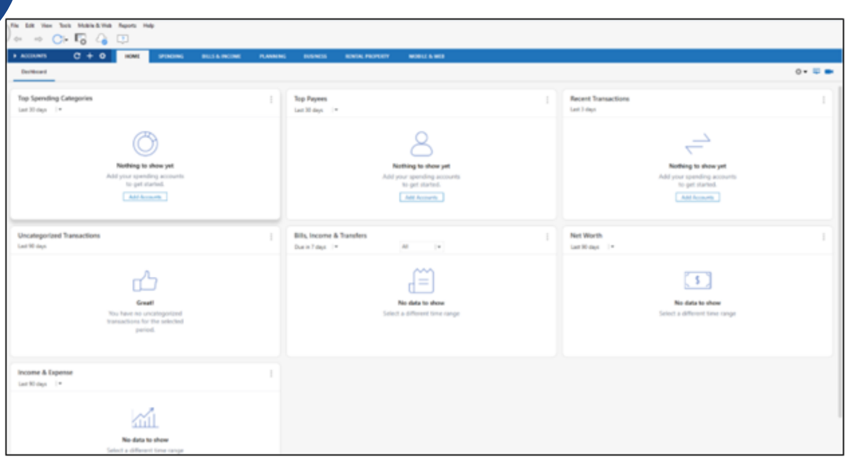
STEP 11



Financial Overview

Click on the 'Add Account' button to obtain a comprehensive financial overview.

STEP 12



From the Dashboard

The next page will display a financial overview, including top spending categories, payees, recent transactions, net worth, etc. You can also adjust the timeframe.

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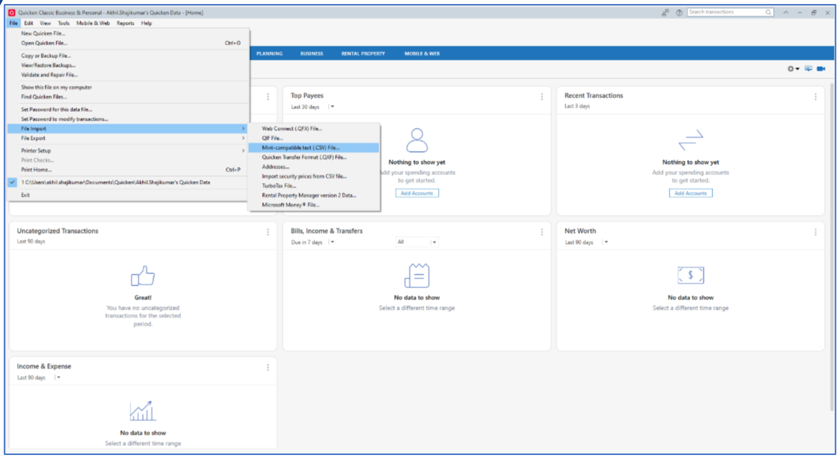
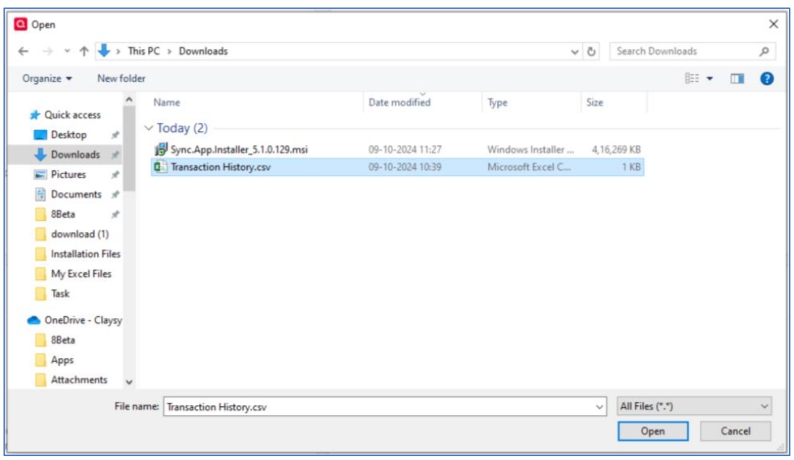
STEP 13



Importing Your CSV

Click on the ‘File’ option, then select the ‘File Import’ option, and finally select the ‘Mint-compatible text (.CSV) File’ option.

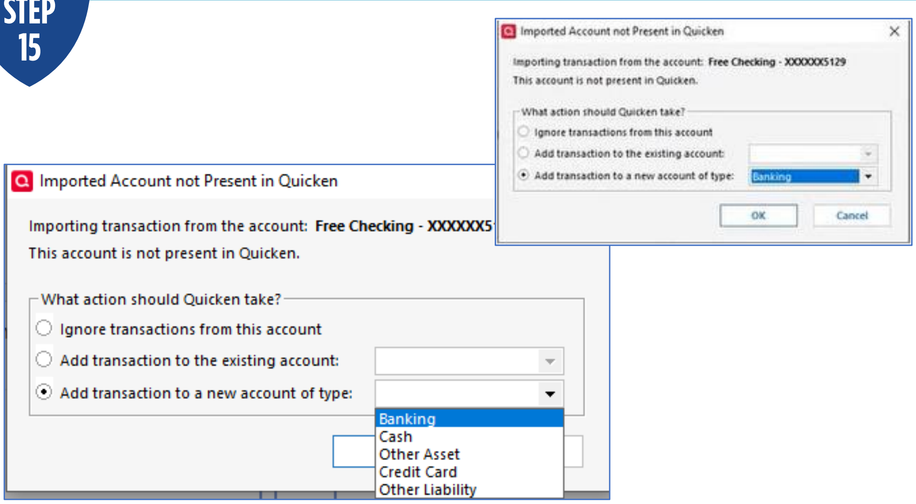
STEP 14



Finding Your File

Browse and select the Transaction History.csv file stored on your computer and then click on the ‘Open’ option.

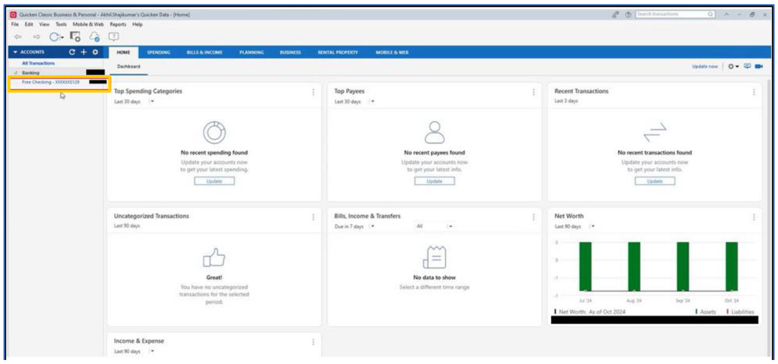
STEP 15



Mapping To Your Account

You'll then see options to select where to sort these records—either to a new or existing account. If you're creating a new account type, select the account type from the dropdown.

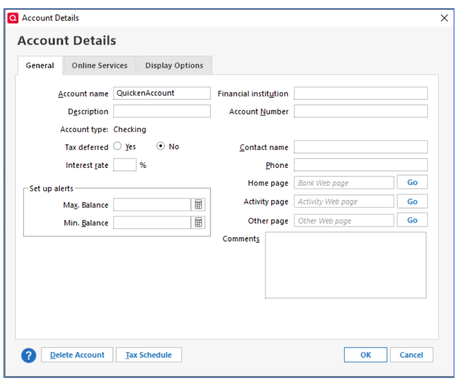
STEP 16

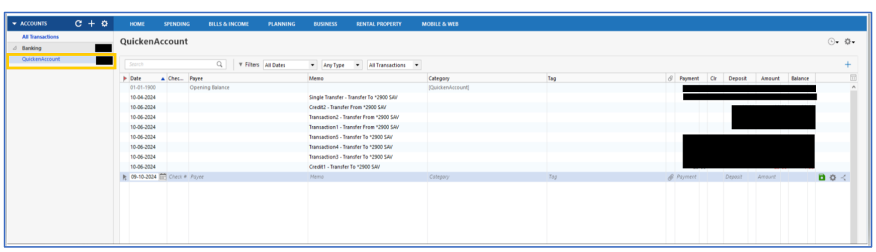


Where Your Accounts Live

If you chose to add a new account, it'll be available under the 'Banking' section of the home dashboard.

STEP 17





Renaming The Account

If you want to rename the new account, right click it and select 'Edit/Delete Account,' then you can rename it in the General tab of Account Details. Once you're happy with the name, navigate back to the Banking section of the dashboard and click on the account to verify that it is mapped correctly.

And that's it!

For the time being, you'll need to export the CSV from Online Banking and upload it in to the Quicken app every time you want to sync the data, until we are able to configure a complete integration. Rest assured, we're working on it with our business Members in mind!