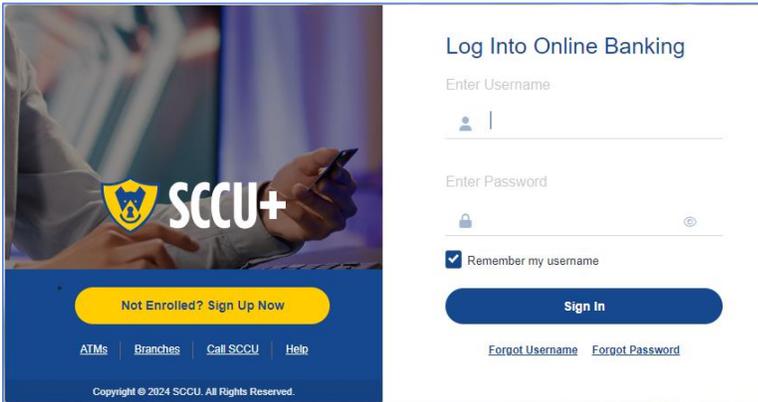


## Quick Guide for Syncing Online Banking Transactions Manually

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

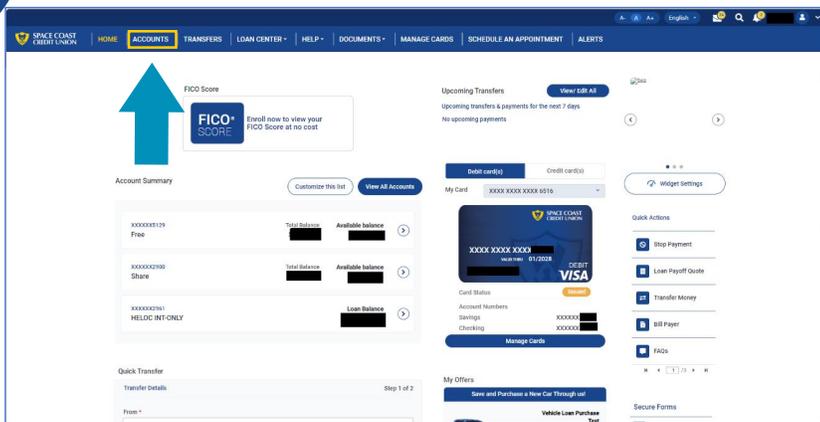
### STEP 1



### Log into Online Banking

To access your account, visit [SCCU.com](https://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.'

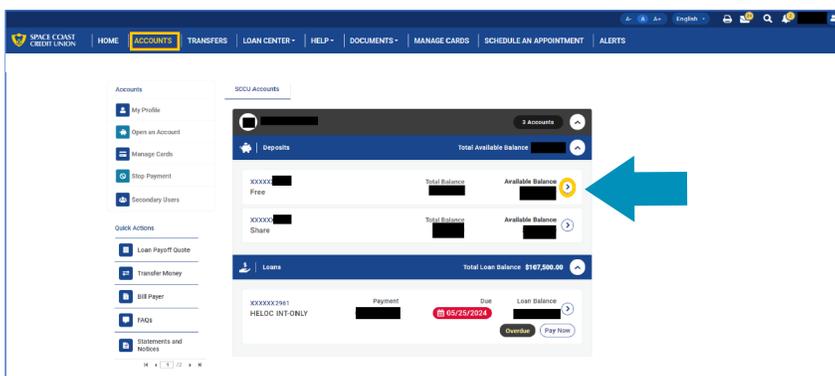
### STEP 2



### From The Home Dashboard

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

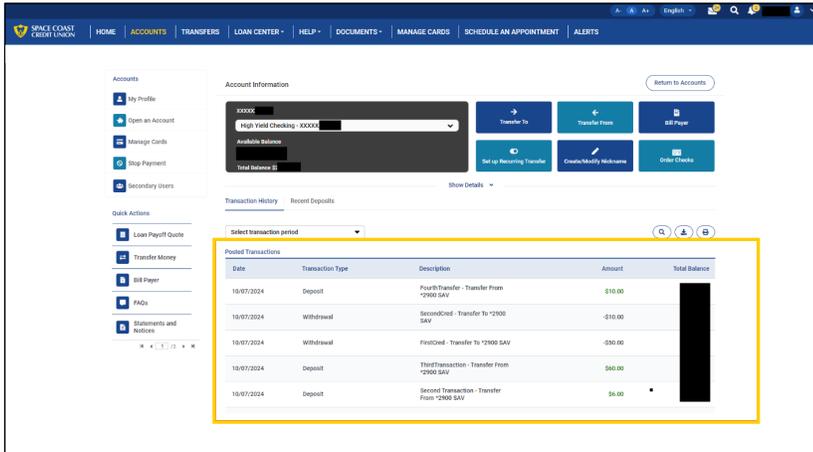
### STEP 3



### Downloading the CSV File

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

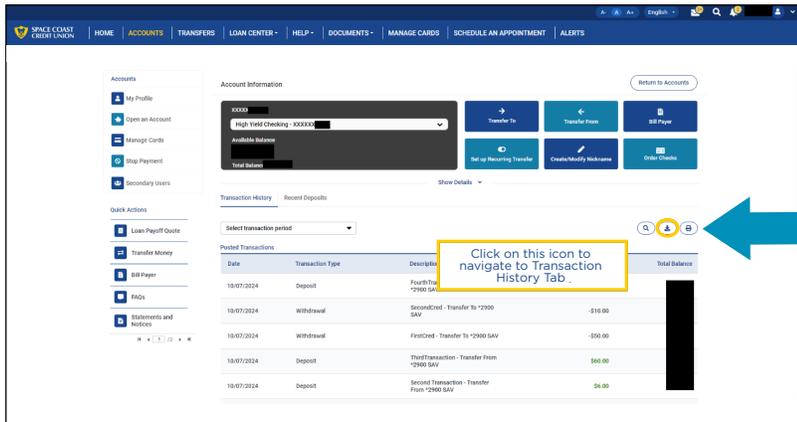
**STEP  
4**



## Posted Transaction History

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

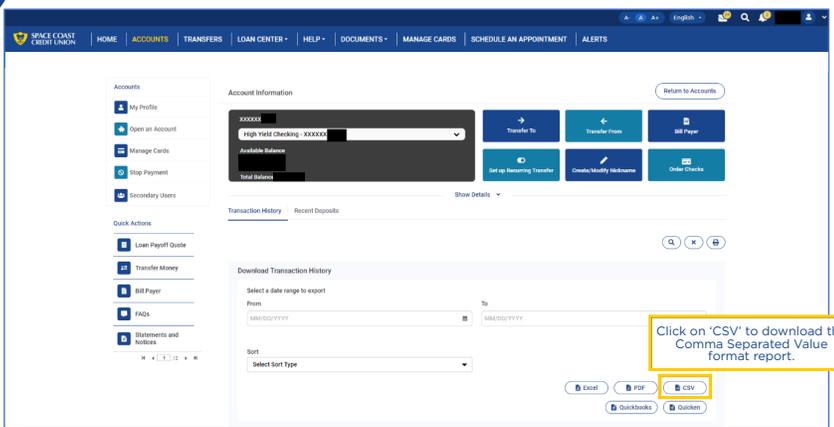
**STEP  
5**



## 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.

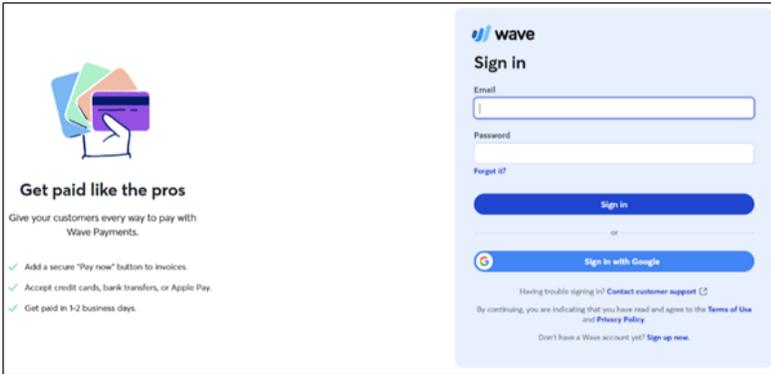
**Once you click 'CSV' the file will be downloaded to your PC and saved in the 'Downloads' folder.**

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

## Sync Your Online Banking Transactions in Wave

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

### STEP 7

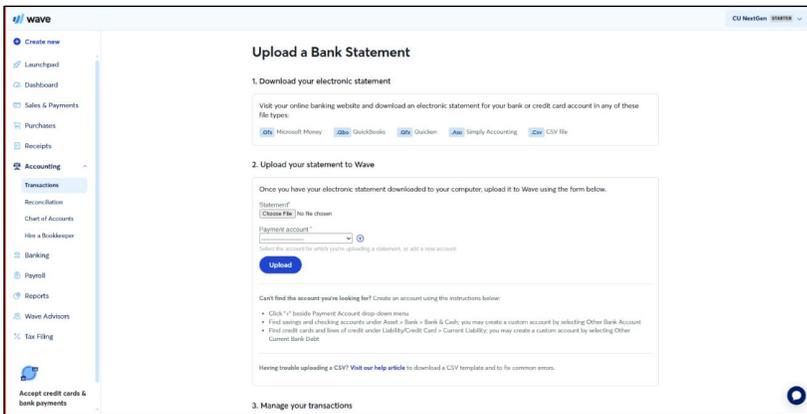


### Log into Wave

Open the Wave login page at **MY.WAVEAPPS.COM** and enter your username and password.

Note: Based on your settings, you may have to provide multi-factor authentication.

### STEP 8

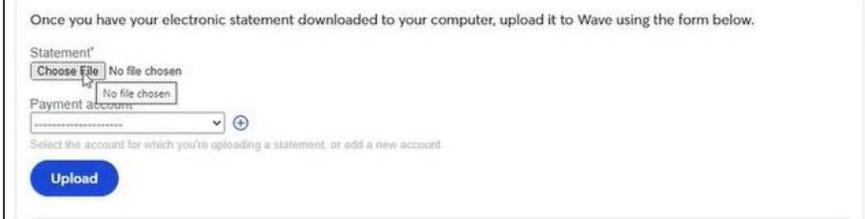


### From The Home Dashboard

Navigate to the 'Transactions' Tab on the left side bar beneath Accounting.

### STEP 9

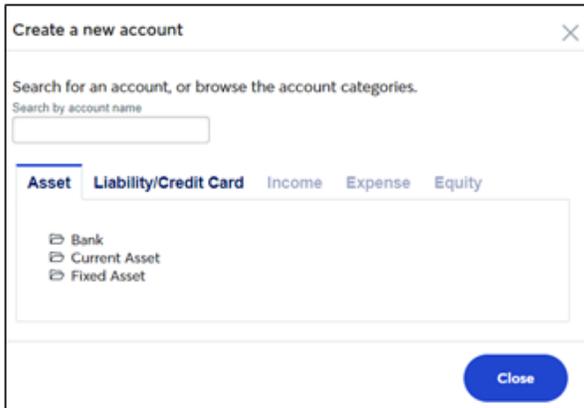
#### 2. Upload your statement to Wave



### Upload Statements

In the 'Upload your statement to Wave' section, click on the 'Choose File' option. This allows you to browse and select the Transaction History.csv file. Then select which account to map to from the dropdown, or add a new one using the + sign.

## STEP 10



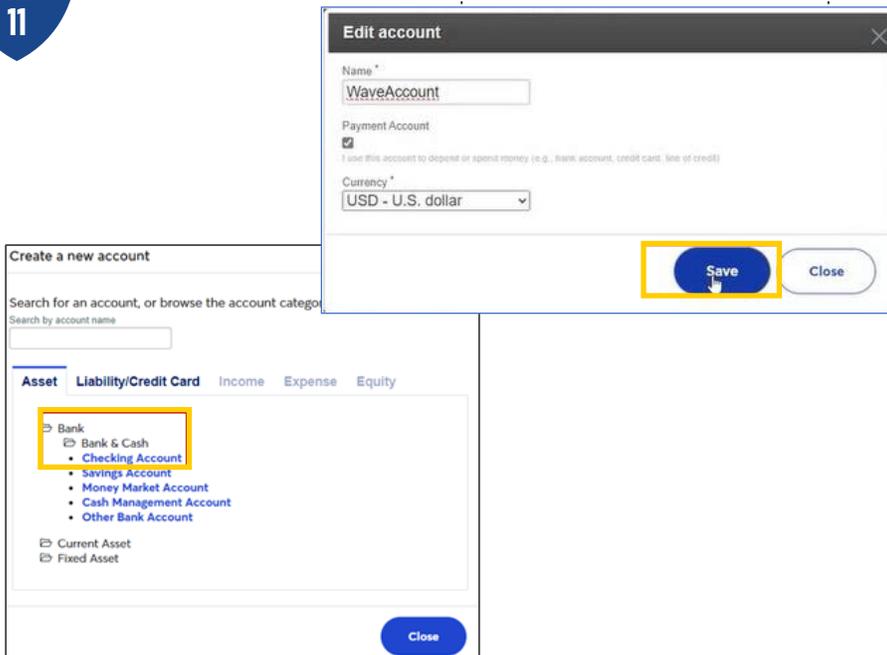
The screenshot shows a dialog box titled "Create a new account" with a search bar and tabs for "Asset", "Liability/Credit Card", "Income", "Expense", and "Equity". Under the "Asset" tab, there are three expandable folders: "Bank", "Current Asset", and "Fixed Asset". A "Close" button is at the bottom right.

### Creating New Accounts

You can skip to step 12 if you already have an account.

To create a new account, select the 'Bank' folder option under the 'Asset' tab.

## STEP 11



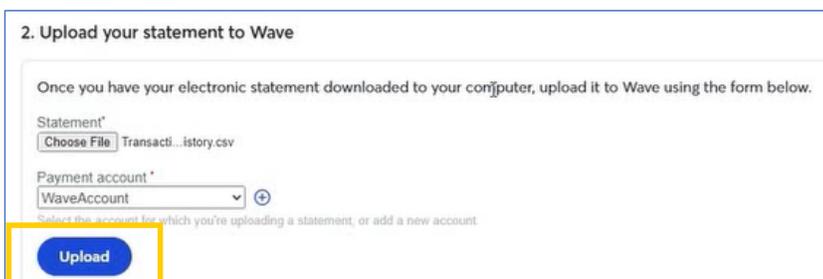
The screenshot shows two overlapping dialog boxes. The background one is "Create a new account" with the "Bank" folder expanded to show "Bank & Cash", "Checking Account", "Savings Account", "Money Market Account", "Cash Management Account", and "Other Bank Account". The foreground one is "Edit account" with fields for "Name" (WaveAccount), "Payment Account" (checked), and "Currency" (USD - U.S. dollar). A "Save" button is highlighted with a yellow box.

### Creating New Accounts Contd.

Next, navigate to the 'Bank & Cash' folder inside the 'Bank' folder and select the relevant option. (In this example, let's select the 'Checking Account' option)

On clicking the 'Checking Account' option, a new window 'Edit Account' will appear. You can change the account name in this window and then click 'Save' option.

## STEP 12



The screenshot shows a form titled "2. Upload your statement to Wave". It includes a "Statement" field with a "Choose File" button and a file name "Transacti...istory.csv". Below it is a "Payment account" dropdown menu set to "WaveAccount". A yellow box highlights the "Upload" button at the bottom.

### Continuing With Upload

Now that the account is created, click on the 'Upload' button.

**STEP  
13**

### CSV Import

1 Select date 2 Select amounts 3 Select description 4 Confirm import

Click on the column containing the dates your transactions were made. [Learn more.](#)

Date	Payee	FI Payee	Amount	Transaction Type	Category	Account	Tag	Notes	Check number
10/06/2024				Expense	Transaction5 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Credit2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Credit1 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction - Transfer From	XXXXXX329		*2900 SAV	

[Confirm date](#)

### CSV Import

1 Select date 2 Select amounts 3 Select description 4 Confirm import

Confirm that the column we've selected contains deposit and withdrawal amounts you made to this account. If a different column is highlighted, please visit our [Help Center](#) for help formatting your CSV.

Date	Payee	FI Payee	Amount	Transaction Type	Category	Account	Tag	Notes	Check number
10/06/2024				Expense	Free Checking - Transaction5 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction4 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction3 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Credit2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Credit1 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction - Transfer From	XXXXXX329		*2900 SAV	

[Confirm amounts](#)

## Confirming CSV Fields

When importing your CSV file, columns containing certain data such as the date, amount, and description will need to be confirmed during import. In step 1, select the date column, in step 2, select the amounts.

**STEP  
14**

### CSV Import

1 Select date 2 Select amounts 3 Select description 4 Confirm import

Click on the column containing the best descriptions for your transactions. [Learn more.](#)

Date	Payee	FI Payee	Amount	Transaction Type	Category	Account	Tag	Notes	Check number
10/06/2024				Expense	Free Checking - Transaction5 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction4 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction3 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Credit2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Credit1 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction - Transfer From	XXXXXX329		*2900 SAV	

[Select description](#)

### CSV Import

1 Select date 2 Select amounts 3 Select description 4 Confirm import

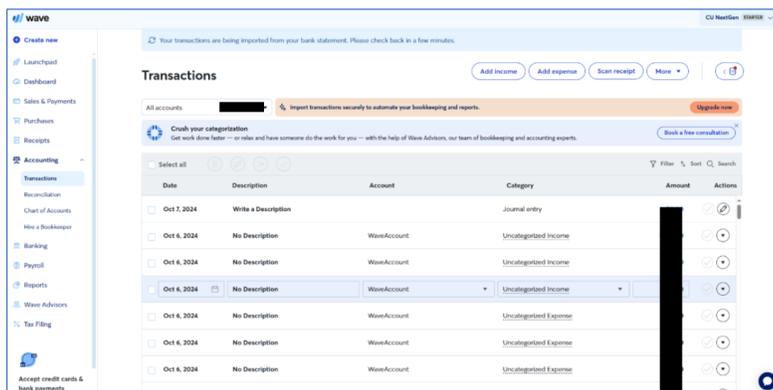
Confirm that the date, amount and description columns you've selected are correct. If everything looks okay, upload your statement.

Date	Payee	FI Payee	Amount	Transaction Type	Category	Account	Tag	Notes	Check number
10/06/2024				Expense	Free Checking - Transaction5 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction4 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Transaction3 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Credit2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Expense	Free Checking - Credit1 - Transfer To	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction2 - Transfer From	XXXXXX329		*2900 SAV	
10/06/2024				Income	Free Checking - Transaction - Transfer From	XXXXXX329		*2900 SAV	

[Upload my statement](#)

## Confirming CSV Fields Contd.

In step 3, map the correct column for descriptions. And finally for step 4, confirm your import and select 'Upload My Statement.'

**STEP  
15**


The screenshot shows the Wave app interface with a list of transactions. The transactions are categorized as 'Uncategorized Income' and 'Uncategorized Expense'. The list includes:

Date	Description	Account	Category	Amount	Actions
Oct 7, 2024	Write a Description		Journal entry		
Oct 6, 2024	No Description	WaveAccount	Uncategorized Income		
Oct 6, 2024	No Description	WaveAccount	Uncategorized Income		
Oct 6, 2024	No Description	WaveAccount	Uncategorized Income		
Oct 6, 2024	No Description	WaveAccount	Uncategorized Expense		
Oct 6, 2024	No Description	WaveAccount	Uncategorized Expense		
Oct 6, 2024	No Description	WaveAccount	Uncategorized Expense		

## Final Confirmation

Once uploaded, confirm if the transaction is mapped on the home dashboard.

## And that's it!

For the time being, you'll need to export the CSV from Online Banking and upload it in to the Wave 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!