

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.



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.'



From The Home Dashboard After logging in, select the 'Accounts' tab to view your account details.



Downloading the CSV File

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

SCCU+ & Wave Integration Guide Page 2



Your life. Your financial watchdog.

CREDIT UNION	HOME ACCOUNTS TH	RANSFERS LOAN CENTER	HELP - DOCUMENTS -	MANAGE CARDS SCHEDULE AN APPOINTMEN	T ALERTS	
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	Loan Payoff Quote	Select transaction	seriod 👻			Q (1)
	Transfer Money	Posted Transactions				
	B Dill Payer	Date	Transaction Type	Description	Amount	Total Balan
	TAQS	10/07/2024	Deposit	FourthTransfer - Transfer From *2900 SAV	\$10.00	
		10/07/2024	Withdrawal	SecondCred - Transfer To *2500 SAV	-\$10.00	
	Statements and					
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	Statements and Notices	H 10/07/2024 10/07/2024	Withdrawal Deposit	FirstCred - Transfer To '2503 SAV ThirdTransaction - Transfer From '2360 SAV Second Transaction - Transfer	-\$50.00	

Posted Transaction History

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



Download Your History

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

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SPACE COAST CREDIT UNION	HOME ACCOUNTS TRANSFER	RS LOAN CENTER • HI	ELP - DOCUMENTS -	MANAGE CARDS	SCHEDULE AN APPOINTMEN	T ALERTS	
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	Loan Payoff Quote						() × ()
	Transfer Money	Download Transaction	History				
	Bill Payer	Select a date range to e	oxport				
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	Statements and						Click on 'CSV' to dow
	Notices	Sort					Comma Separated format repor
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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.

Get paid like t Give your customers every Wave Paymer -> Add a secuer "Pay now" but -> Accept credit cards, bank t -> Get paid in 1-2 business de	Wave Sign in End End End Passend Passend P	 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.

pload your statement to Wave
sce you have your electronic statement downloaded to your computer, upload it to Wave using the form belo
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yment account
the account for which you're uploading a statement, or add a new account
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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.



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SCCU+ & Wave Integration Guide Page 4

Create a new account	×
Search for an account, or browse the account categories. Search by account name	
Asset Liability/Credit Card Income Expense Equity	
D Bank D Current Asset D Fixed Asset	
Close	

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.

	Name * WaveAccount Payment Account I I use this account to depend or apend money (e.g., have account, credit card, line of credit) Currency * USD - U.S. dollar
ate a new account rch for an account, or browse the account th by account name sset Liability/Credit Card Income Bank Bank & Cash Checking Account Saving Account Money Market Account	catego

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.

2. Upload your stat	tement to Wave
Once you have you	r electronic statement downloaded to your conj̃puter, upload it to Wave using the form below
Statement'	
Choose File Transact	iistory.csv
Payment account	

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



STEP

SCCU+ & Wave Integration Guide Page 5

CSV Im	port				CSV Import						
1 Select d	ate 2 Select amounts	3 Select description	4 Confirm import		1 Select o	tele 2 Select.anounts	3 Select description	4 Confirm Import			
Click on the co	olumn containing the dates yo	ur transactions were made. Le	arn more.		Confirm that t	he column we've selected co	ntains deposit and withdrawal	amounts you made to th	is account. If a dif	erent co	
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10/06/2024		Income	Free Checking - X0000005129	Transaction1 - Transfer From *2900 SAV	10/06/2024	_	Income	Free Checking	Transactioni - Transfer From		

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.

CSV Im	port				1 Select of	aa) 2 sa	lect amounts 3 5	elect description 4 G	selim import	
1 Selected	lu 2 Select are	sunts 3 Select description	4 Confirm Import		Confirm that t	he date, amoun	t and description colur	ms you've selected are corre	sct. If everything look	s okay, upload your :
Click on the co	dumn containing the b	sest descriptions for your transacti	kons. Learn more.		Date	Description	FIPayee Amount	Transaction Type Calegory	Account 1	kg Memo
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10/06/2024		Income	Free Checking - XX000005129	Transaction1 - Transfer From *2900 SAV	10/06/2024		-	Income	Free Checking - X0000005129	Transaction1 - Transfer From *2900

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.'

🕖 wave					CU NextGen
Create new	${\boldsymbol{\mathcal{Z}}}$ Your transactions are b	sing imported from your bank statement	Please check back in a few minute	P5.	
 <i>G</i> Launchpad 	Transactions			Add income Add expense Scan m	Icelpt More •
Sales & Payments	All accounts	• $\Phi_{\rm e}$ Import transactions s	scurely to automate your bookkeeping a	and reports.	Upgrade now
Receipts	Crush your categor Get work done faster	ization — or relax and have someone do the work for	you — with the help of Wave Advisors.	our team of bookkeeping and accounting experts.	Book a free consultation
₽ Accounting	Select all				γ Filter № Sort Q Search
Transactions	Date	Description	Account	Category	Amount Actions
Chart of Accounts	Oct 7, 2024	Write a Description		Journal entry	
Hire a Bookkeeper	Oct 6, 2024	No Description	WaveAccount	Uncategorized Income	
Payroll	Oct 6, 2024	No Description	WaveAccount	Uncategorized Income	
Reports	Oct 6, 2024	No Description	WaveAccount	Uncategorized Income	• • • • •
2 Wave Advisors % Tax Filing	Oct 6, 2024	No Description	WaveAccount	Uncategorized Expense	• 📀 💿
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5	Oct 6, 2024	No Description	WaveAccount	Uncategorized Expense	
accept credit cards & bank payments					

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!