

Sage



# How to connect Nedbank to Sage

Your user guide

October 2023

see money differently

**NEDBANK**

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## Nedbank and Sage direct feeds



We are excited to announce that our direct feed is now available to Sage users with Nedbank small-business profiles.

### **What are direct feeds?**

Direct bank feeds allow Sage users to automatically import their financial transactions, without the need to do it manually or to use a third party.

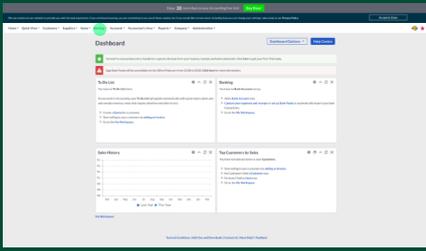
With direct feeds, Sage users can ensure that their financial records are accurate and up to date, making it easier to reconcile their accounts.

Once you have set up the feed, automatically retrieve transactional data from Nedbank to Sage on a daily basis. The data is imported into Sage, where you or your bookkeeper can review and categorise it.

With direct feeds, it's easier to ensure that your financial records are accurate and up to date, making it seamless to reconcile your accounts.

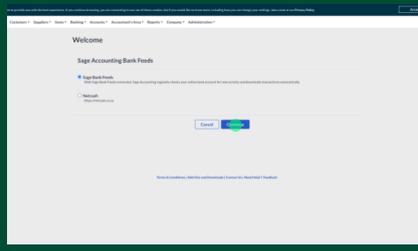
# 2 How to set up a new direct feed

## A Sage Business Cloud Accounting



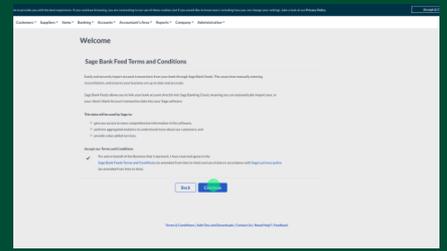
1

Log in to Sage and go to **Banking > transactions > Manage bank feeds**.



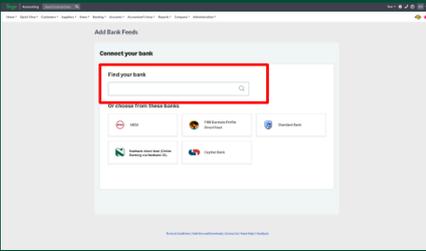
2

Select Sage Bank Feeds and click on **Continue**.



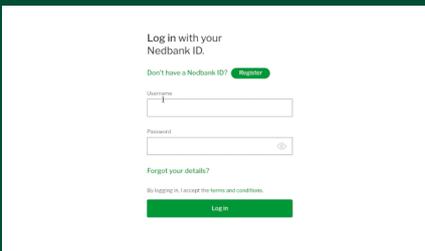
3

Accept the terms and conditions.



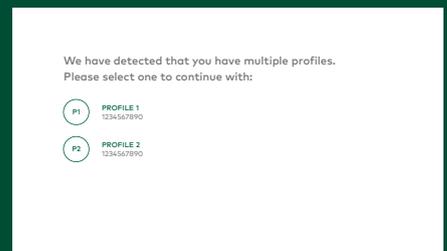
4

Search for **Nedbank Direct Feed**.



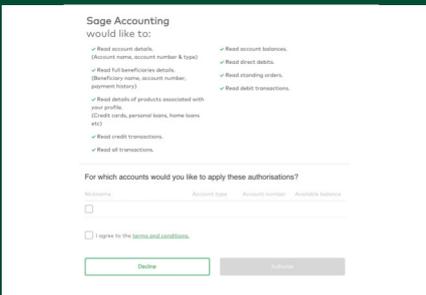
5

You will be redirected to the Nedbank ID API\_Marketplace website. Log in with your Nedbank ID.



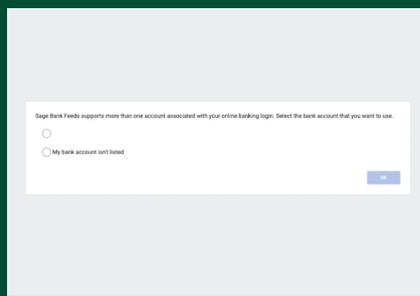
6

Choose the profile(s) you would like to link and continue.



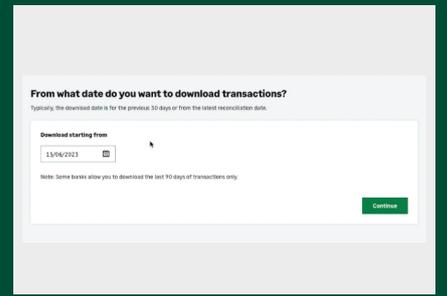
7

Choose the account(s) you would like to link and continue.



8

You will now be redirected to Sage.

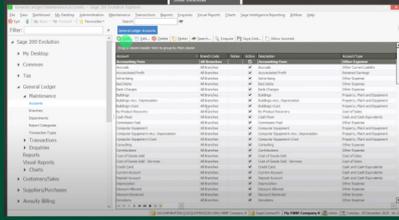


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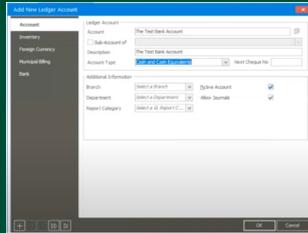
Select the date from which you want to download transactions. Your bank feed is now connected.

# 2 How to set up a new direct feed

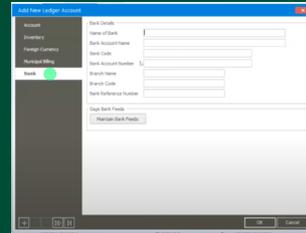
## B Sage 200 Evolution



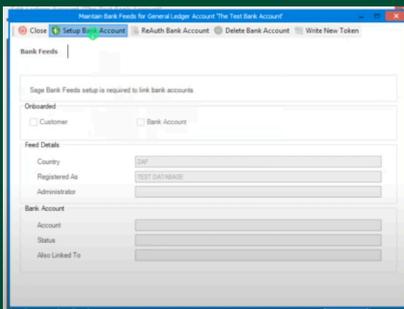
1 From your dashboard, click on **Add bank account**.



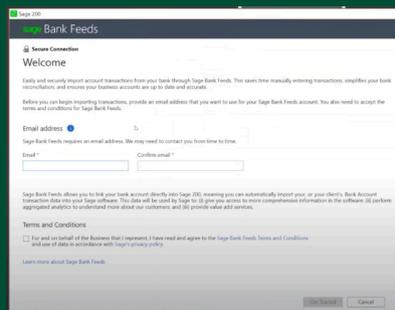
2 Bank feeds are applicable only to general ledger accounts using cash and cash equivalent account types.



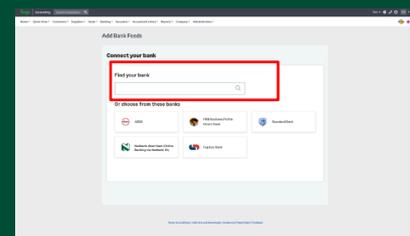
3 From the bank tab, click on **Manage bank feeds**.



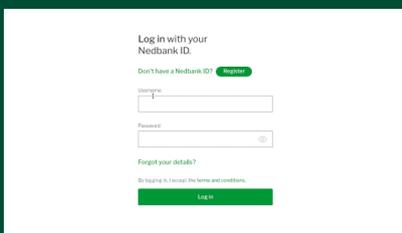
4 To configure your bank feed, click on **Set up Bank Account**.



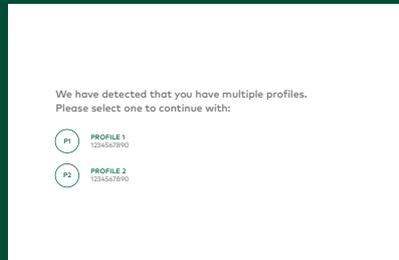
5 Set up your email address and click on **Get started**.



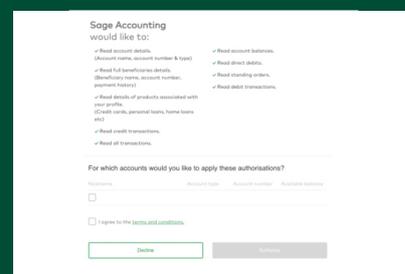
6 Search for **Nedbank Direct Feed**.



7 You will be redirected to the Nedbank ID API\_Marketplace website. Log in with your Nedbank ID.

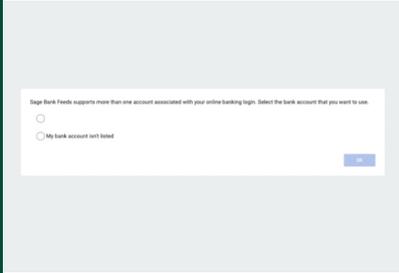


8 Choose the profile(s) you would like to link and continue.



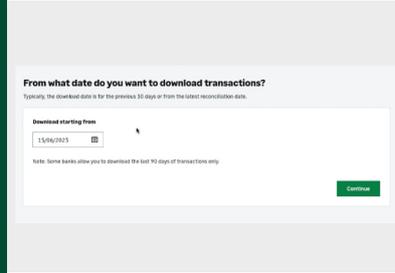
9 Choose the account(s) you would like to link and continue.

## ▶ 2 How to set up a new direct feed B Sage 200 Evolution



10

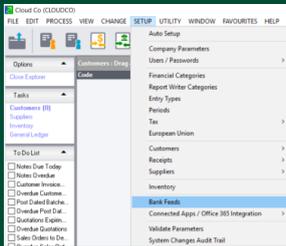
You will now be redirected to Sage.



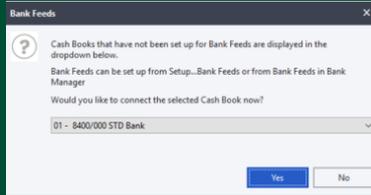
11

Select the date from which you want to download transactions. Your bank feed is now connected.

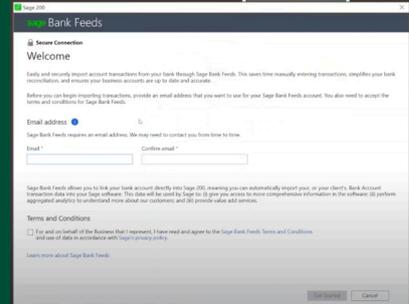
# 2 How to set up a new direct feed C Sage 50c Accounting



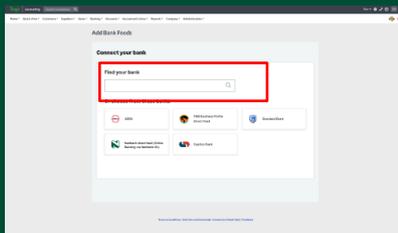
1 Select Setup > Bank feeds.



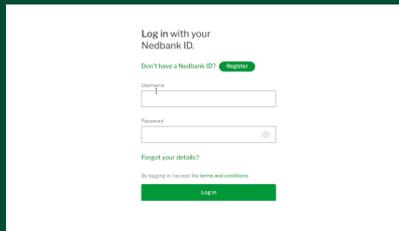
2 The Bank Feeds screen will appear



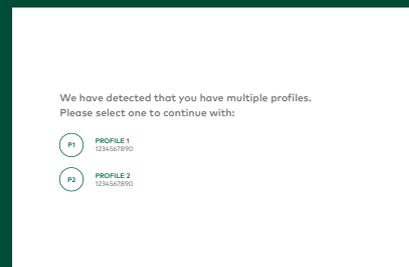
3 Set up your email address and click on **Get started**.



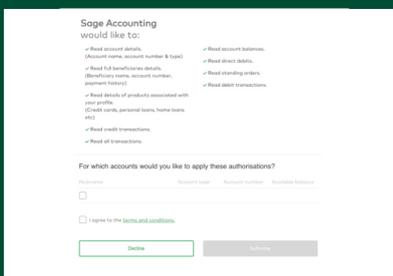
4 Search for **Nedbank Direct Feed**.



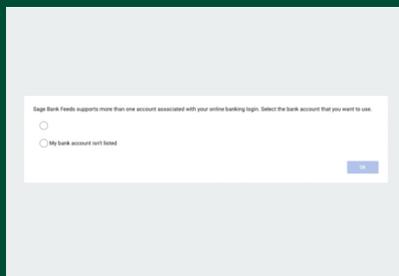
5 You will be redirected to the Nedbank ID API\_Marketplace website. Log in with your Nedbank ID.



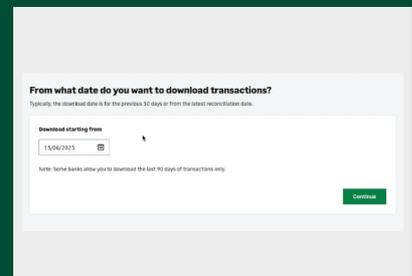
6 Choose the profile(s) you would like to link and continue.



7 Choose the account(s) you would like to link and continue.



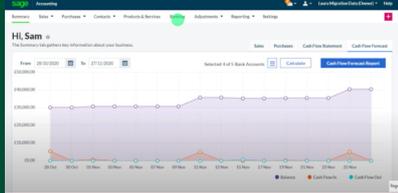
8 You will now be redirected to Sage.



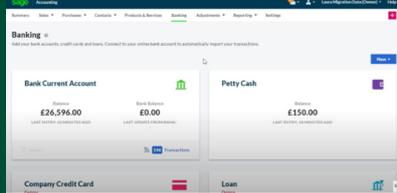
9 Select the date from which you want to download transactions. Your bank feed is now connected.

## 2 How to set up a new direct feed

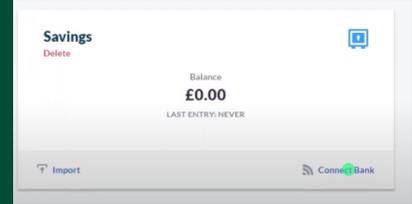
### D Sage Intacct



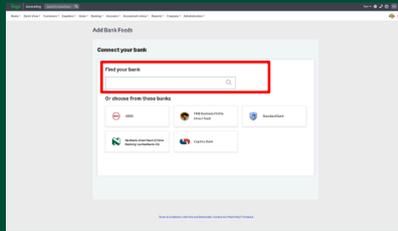
1 From your dashboard, click on **Banking**.



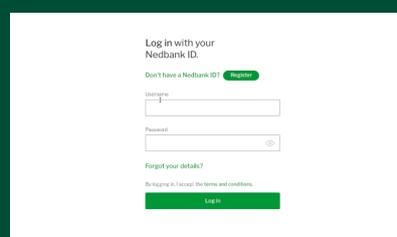
2 Locate the bank account you would like to use.



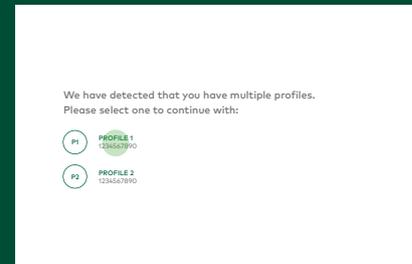
3 Click on **Connect bank**.



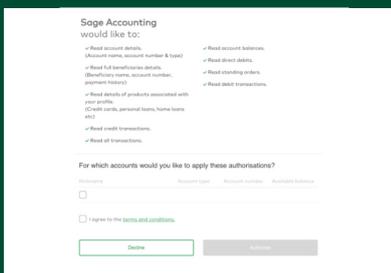
4 Search for **Nedbank Direct Feed**.



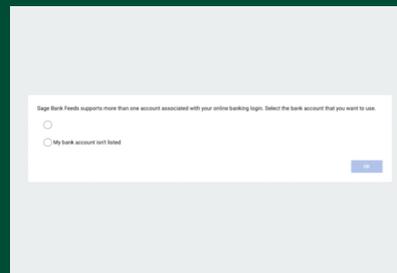
5 You will be redirected to the Nedbank ID API\_Marketplace website. Log in with your Nedbank ID.



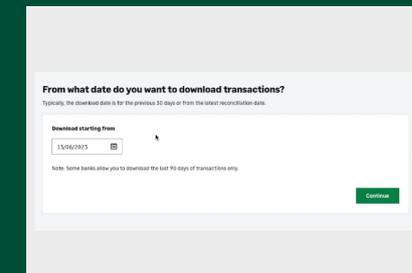
6 Choose the profile(s) you would like to link and continue.



7 Choose the account(s) you would like to link and continue.



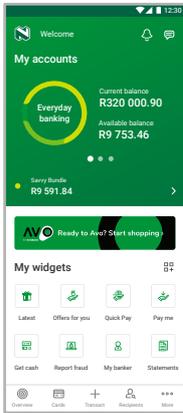
8 You will now be redirected to Sage.



9 Select the date from which you want to download transactions. Your bank feed is now connected.

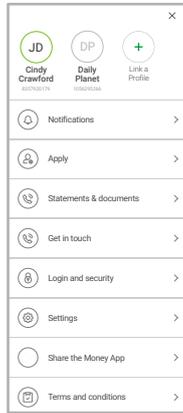
# ▶ 3 How to revoke a feed

## Money App



1

Log in to the Money app and tap on More.



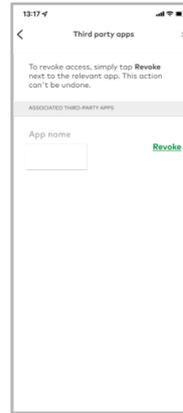
2

Tap on Login and security.



3

Tap on Third-party apps.



4

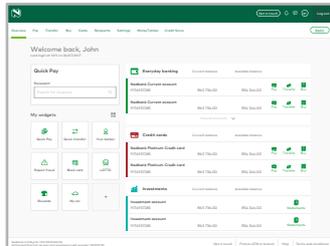
Tap on Revoke next to the associated third-party app that you would like to revoke.



5

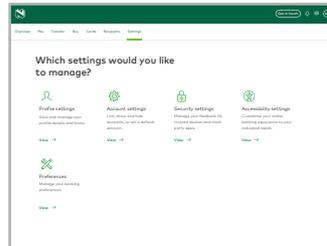
Tap on Revoke.

## Online Banking



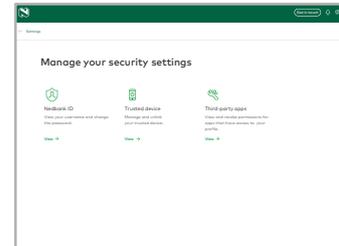
1

Log in to Online Banking at <https://secured.nedbank.co.za> and click on Settings.



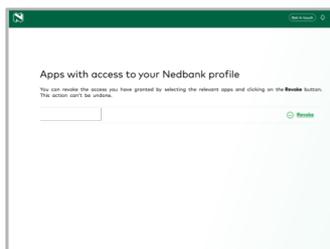
2

Click on Security settings.



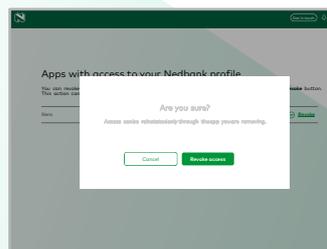
3

Click on Third-party apps.



4

Click on Revoke next to the Sage app you would like to revoke.



5

Click on Revoke access.

## ▶ 4 Frequently asked questions

### **How do I disconnect an existing Yodlee link before activating my direct feed?**

Please visit the Sage Knowledgebase for more information:

<https://za-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=201020111909077&page=2&position=1&q=disconnect%20bank%20feed>

### **Which Sage products support a direct feed?**

The following products support direct feeds:

- Sage 200 Evolution
- Sage Intacct
- Sage 50c Accounting
- Sage Business Cloud Accounting

### **Which profiles do the direct feed support?**

The direct feed currently works with Nedbank's retail profiles that are accessible via the Money app and Online Banking.

Juristic profiles that are accessible via the Nedbank Business Hub will be supported in the future.

### **I can't find all my transactions in Sage.**

Transactions are updated in Sage only after your direct feeds update. Pending transactions will synchronise only when they have been finalised. For transactions to be finalised your Nedbank statement frequency must be set to daily.

Contact your relationship banker or call the Nedbank small-business contact centre to change your statement frequency.

Get support from Nedbank – call us 24/7.

Calls within South Africa: 0800 116 400

Calls outside of South Africa: +27 (0) 31 820 5915

If you're a small-business client, you can contact your relationship banker:

- Log in to the Money app and go to **More > Get in touch > Your banker.**
- On Online Banking, go to **Get in touch** in the top menu.

If you think your problem is with Sage:

Log a support ticket at <https://www.sage.com/en-za/support/>.

### **What transactional history is available on the direct feed?**

You will be able to access up to six months (180 days) of transactions on setting up your direct feed.

### **I have forgotten my Nedbank ID username and password.**

To recover your login details, please visit <https://secured-id.nedbank.co.za> and click on **Forgot your details?**

### **Can I link multiple Nedbank accounts to Sage?**

Yes. Follow the steps above under How to set up a new direct feed.

## ▶ 4 Frequently asked questions

### **Are direct feeds secure?**

Direct feeds do not use any third parties, but leverage API technology to create a secure feed between your bank account and accounting software.

### **How much do direct feeds cost?**

Direct feeds are free.

### **When does the feed sync?**

The direct feed syncs at 02:00 daily. Ensure your statement cycle setting has been set to daily.

### **How do I set my statement cycle to daily?**

Contact your relationship banker to help you change your statement cycle to daily.

Contact your relationship banker:

- Log in to the Money app and go to **More > Get in touch > Your banker**.
- On Online Banking, go to **Get in touch** in the top menu.

### **I'm a secondary user in the business. Can I set up the bank feed on my client's behalf?**

Secondary users can set up direct feeds using the steps under 'How to set up a new direct feed', using their own Nedbank ID username and password.

Speak to your banker for more information:

- Log in to the Money app and go to **More > Get in touch > Your banker**.
- On Online Banking, go to **Get in touch** in the top menu.

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For more information please visit  
[nedbank.co.za/smallbusiness](http://nedbank.co.za/smallbusiness).