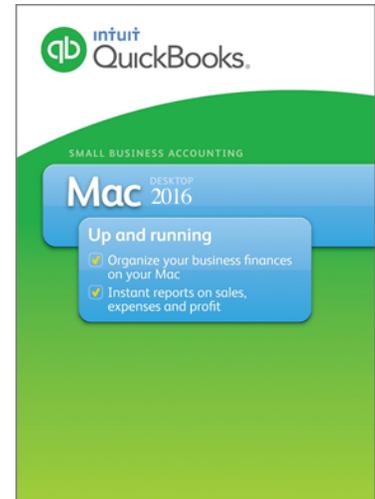# QuickBooks 2016 for Mac Getting Started Guide

Thank you for choosing QuickBooks!

About this Guide

This guide helps you get started with QuickBooks as quickly as possible. You'll learn:

- What you will need to get started

- How to set up an account for online banking (Direct Connect)

- How to update an account (Direct Connect)

QuickBooks 2016 Downloaded Transactions Interface

The QuickBooks 2016 Online Banking center is a one-stop-shop to download your online banking activity and match transactions.

What you Need to Get Started

Before you enable your QuickBooks accounts to download transactions and make online payments, you will need your User ID and Password for First Federal Lakewood Business Online Banking.

Then follow these steps:

1. Backup Your QuickBooks Data File.

   For backup instructions, choose the **Help** menu and use the Search bar available at the top. Search for *Back Up* and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.

2. Download the latest QuickBooks update.

   For update instructions, choose the **Help** menu and use the Search bar available at the top. Search for *Update QuickBooks*, select **Check For QuickBooks Updates**, and follow the instructions.

Set Up an Account for Online Banking (Direct Connect)

1. Choose **Banking** menu > **Online Banking Setup**.
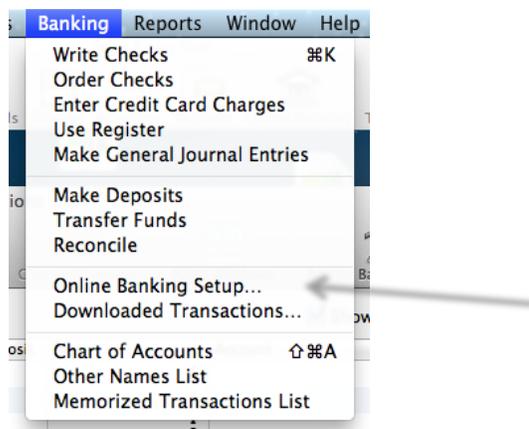
2. Enter the name of your financial institution - **First Federal Lakewood–Bus QBDC**.
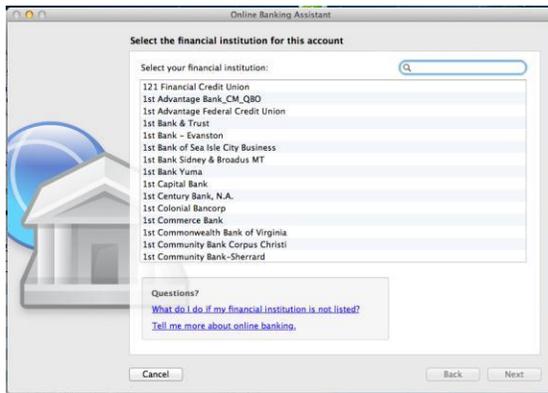
3. Choose your financial institution and click **Next**.

4. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.

5. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.

6. Enter credentials and click **Sign In**.

7. For each account you wish to download into QuickBooks, click **Select an Account** to connect to the appropriate existing account register.

8. Click **Next** and then click **Done**.

Updating an Account (Direct Connect)

1. Choose Banking menu > Downloaded Transactions.
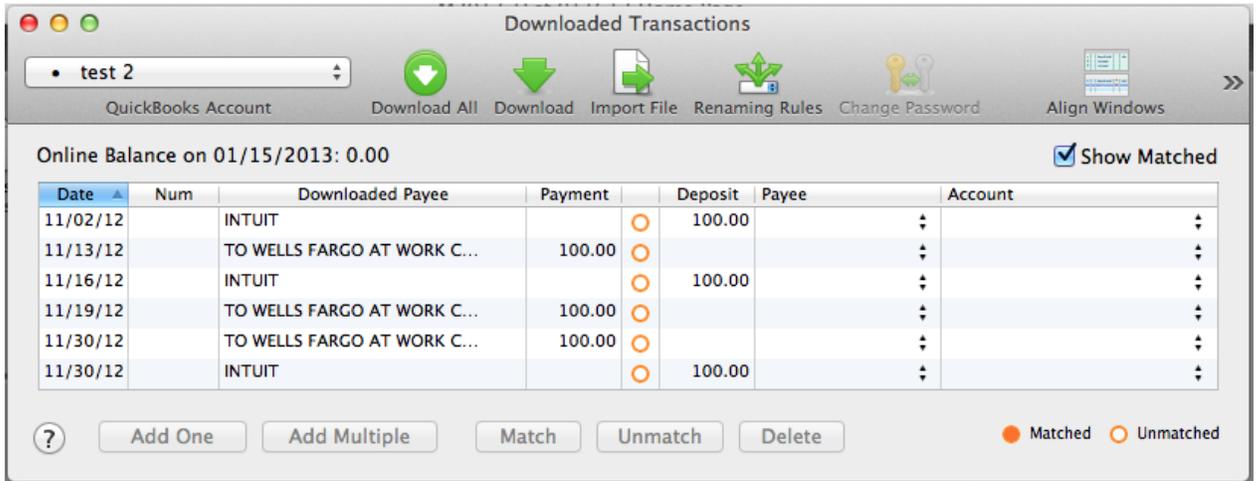
2. Click **Download** to update only the selected account, or **Download All** to update all of your accounts activated for online banking.

3. QuickBooks will open a window to enter the password for your Business Online Banking account. Enter this and then click OK.

> **NOTE:**   You can choose to add your online banking password to your Mac OS Keychain. Intuit does not recommend saving your online banking password in this manner.

QuickBooks will then connect and synchronize online banking transactions with the financial institution.

4. QuickBooks will give you a count of how many transactions were imported. Click **OK** to continue.

5. QuickBooks will then return to the Downloaded Transactions window and open the register for the selected account so that you can begin the transaction matching process.

Special Note 1: Matching and Adding Transactions

1. Choose **Banking** menu > **Downloaded Transactions**.

2. Click the QuickBooks Account menu and choose the account you want to import into.

3. Use the buttons at the bottom of the Downloaded Transactions window to add downloaded transactions to the account register. You can add multiple transactions at once, match them to transactions already in the register, and more.

4. For detailed instructions on how to match and add transactions go to the QuickBooks Help menu, and use the search field at the top to search for "Match Transactions," then select the article ***Online Banking: Updating your Register***.