

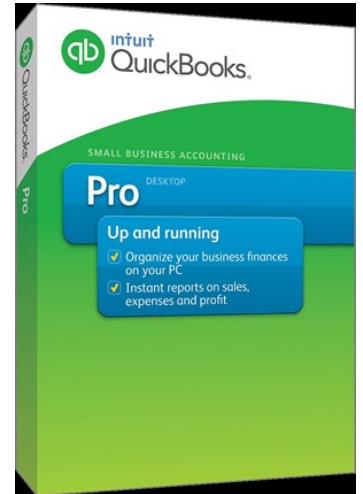
# QuickBooks 2016 for Windows Getting Started Guide

Thank you for choosing QuickBooks!

## About this Guide

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

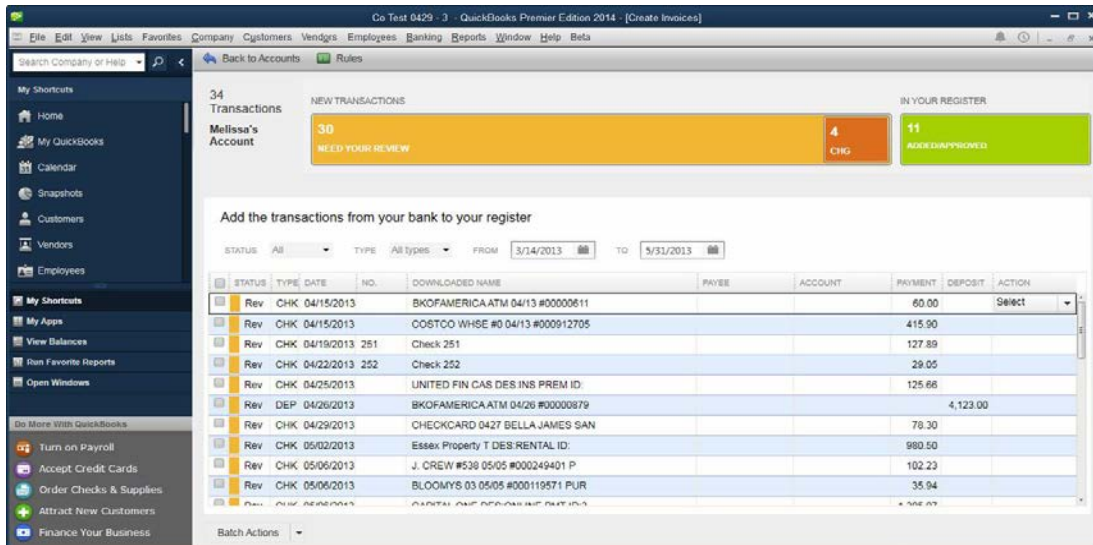
- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to update an account (Direct Connect)



## The Online Banking Center – Bank Feeds

1. To get to the Bank Feeds menu go to **Banking** menu > **Bank Feeds** > **Bank Feeds Center**.
2. You will use Bank Feeds to keep your QuickBooks accounts up to date.
3. Click **Refresh Account** to synchronize transactions with your financial institution (more information below).

The Transaction List window allows you to match downloaded transactions to existing ones in your account register and add new transactions (see the special note at the end of this document for more information).



## Display Modes

Express Mode (Bank Feeds) is the default Online Banking interface in QuickBooks 2015. Compared to Side-By-Side Mode, the online banking interface has changed significantly. This new interface provides a better workflow and offers better visuals to showcase customer data.

The first time you set up an account for online banking, you will be prompted to set the display mode; either Express Mode (Bank Feeds) or Register mode. This guide focuses on the new Express Mode. This is the newest mode with the most advanced features.

Choose **Help** menu > **QuickBooks Help**. Search for **Online Banking Modes**, then select **Online Banking Modes overview** for more information about display modes.

## Connect and Update Your Data

Before you set QuickBooks 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. Back Up Your QuickBooks Data File.

For instructions to back up your data file, choose Help menu > QuickBooks Help. Search for Back Up and follow the instructions.

2. Download the latest QuickBooks update.

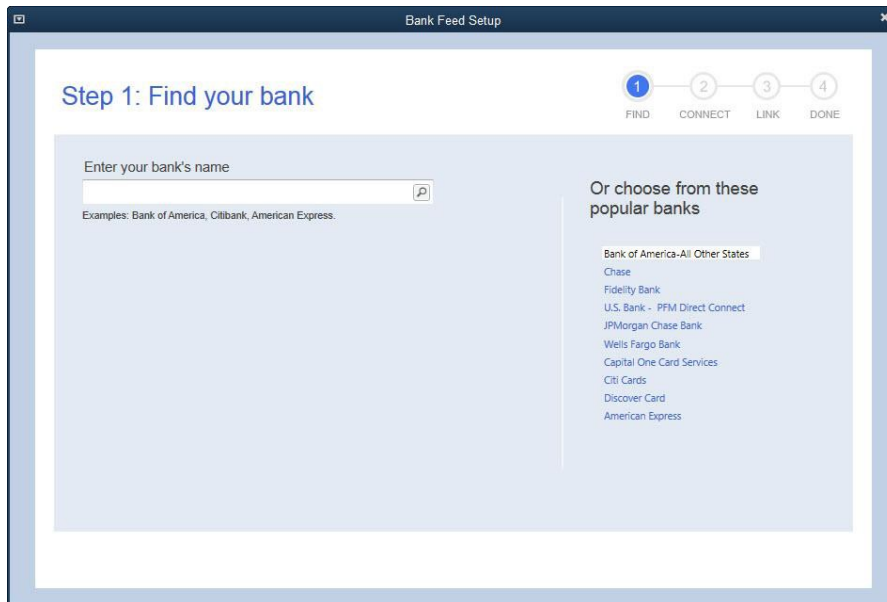
For update instructions, choose **Help** menu > **QuickBooks Help**. Search for *Update QuickBooks*, then select **Updating QuickBooks**, or **Update QuickBooks**, and follow the instructions.

3. Switch to single user mode, if you are sharing the QuickBooks data file among multiple computers.

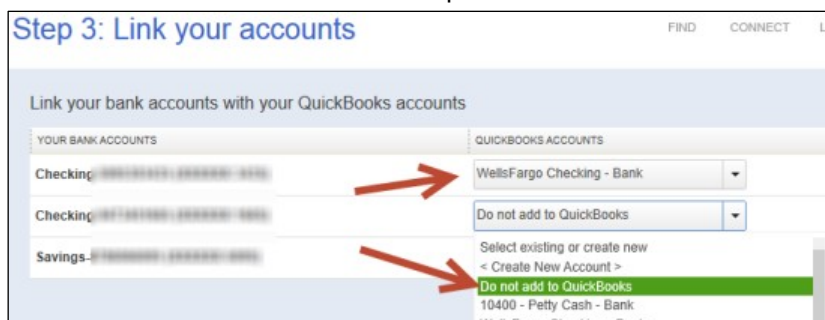
For instructions to switch to single user mode, choose **Help** menu > **QuickBooks Help**. Search for *Switch to Single User Mode* and follow the instructions.

## Set Up an Account for Online Banking (Direct Connect)

1. Choose **Banking** menu > **Bank Feeds** > **Set Up Bank Feeds for an Account**.
2. On the **Step 1: Find your bank** screen, type the name of your bank (First Federal Lakewood-Bus QBDC ) in the entry field. When your bank appears in the filter results, click it.



3. Depending on your financial institution, after you click your bank name, you may see a screen to select Direct Connect, or you may be asked to enter your credentials.
4. If you already enrolled in Direct Connect, click **Continue**. The **Step 2: Connect Financial Institution to QuickBooks** screen will appear.
5. Enter your credentials and click **Connect** to connect to your bank.
6. After you connect, you will see all accounts at your financial institution that you can add to QuickBooks. If you don't have an account ready in QuickBooks, click **<Create New Account>** to create a new account. If you don't want to download data from a particular account, choose **Do not add to QuickBooks** from the drop-down menu.

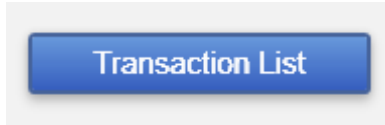


7. After you add your accounts, click **Close**.

## Special Note: Matching and Adding Transactions

After you set up Bank Feeds and open the Bank Feeds Center, you need to tell QuickBooks how to handle downloaded transactions.

1. Go to **Banking** menu > **Bank Feeds** > **Bank Feeds Center**, select the account you want to work on and click **Transaction List**.



A colored bar will indicate the following:

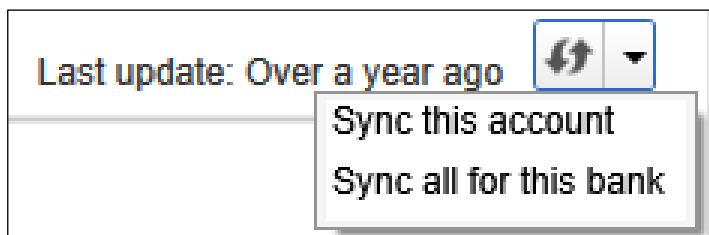
- Transactions in orange need your review
- Transactions in red have been changed by rules
- Transactions in blue have been automatically matched.

**NOTE:** You can filter your transactions easily using the status, type, and date range filters.

2. Add or Verify the QuickBooks income/expense account on each transaction.

## Updating an Account (Direct Connect) – Express Mode (Bank Feeds)

1. Choose **Banking** menu > **Bank Feeds** > **Bank Feeds Center**.
2. Select the account you want to update in the Bank Feeds window.
3. After you select the account, click **Download Transactions** to start the update process. If you have multiple accounts with the same bank, you can choose to sync either one or all accounts by clicking the sync button in the upper-right hand corner.



After the sync is complete, your accounts should be up to date.