



Setting up Online Banking in QuickBooks

Instructions to set up online banking through Direct Connect for QuickBooks 2008 or later.

For QuickBooks 2009 or later:

1. Choose **Banking > Online Banking > Set Up Account for Online Services**.
2. Click the **Select your QuickBooks account** drop-down arrow, select the QuickBooks account that will connect to Consumers Credit Union, and then click **Next**.
3. Click the **Enter the name of your Financial Institution (FI)** drop-down arrow and select **Consumers Credit Union - DC** for this account.
4. Click **Next**.
5. Select the **Direct Connect** option (if displayed) and click **Next**.
6. Select **Yes, my account has been activated for QuickBooks online services** and click **Next**.
7. Enter your **Member Number, Online Banking Password,** and **Confirm your Online Banking Password** to sign in to Consumers Credit Union.
8. Click **Sign In**. QuickBooks will connect to the bank's server to download bank data for the selected account.
9. Select the account you want to connect to QuickBooks.
10. Click **Finish** after the download completes. You have successfully activated online banking.
11. To ensure online banking is functioning correctly, select the following option that fits your online banking preference:
 - **For side-by-side mode:** Select the account you want to download from the **Financial Institution** section labeled **Download Online Accounts** and click **Receive Transactions**.
 - **For register mode:** Select **Download Bank Data for account: XXXXXXXX** from the **Items To Send** section and click **Go Online**.

For QuickBooks 2008:

1. Choose **Banking > Online Banking > Set Up Account for Online Services**.
2. Click the **Select your QuickBooks account** drop-down arrow, select the QuickBooks account that will connect to Consumers Credit Union, and then click **Next**.
3. Click the **Enter the name of your Financial Institution** drop-down arrow and select **Consumers Credit Union - DC** for this account.
4. Click **Next**.
5. Select the **Direct Connect** option (if displayed) and click **Next**.
6. Select **I have my special QuickBooks online services FI.com Password** and click **Next**.
7. Enter your **Member Number, Online Banking Password, and Confirm your Online Banking Password** to sign in to Consumers Credit Union.
8. Click **Sign In**. QuickBooks will connect to the bank's server to download bank data for the selected account.
9. Select the account you want to connect to QuickBooks.
10. Click **Finish** after the download completes. You have successfully activated online banking.
11. To ensure online banking is functioning correctly, select **Download Bank Data for account: XXXXXXXX** from the **Items To Send** section and click **Go Online**.