

## QuickBooks for Mac Getting Started Instructions

**QuickBooks for Mac Direct Connect** 



## **Documentation and Procedures**

## Task 1: Connecting to Sound Credit Union Direct Connect

1. After logging into QuickBooks, Choose Banking menu  $\rightarrow$  Online Banking Setup...



2. Type 'Sound CU' into the Search Box for the Financial Institution name. It will display the results, click on Sound CU. NOTE: Do NOT choose Sound Credit Union–it's for Web Connect, which is being phased out.

0 0 0	Online Banking Assistant	
	Select the financial institution for this account	
	Select your financial institution:	
	121 Financial Credit Union	
	1st Advantage Bank_CM_QBO	
	1st Advantage Federal Credit Union	
	1st Bank & Trust	
	1st Bank - Evanston	
	1st Bank of Sea Isle City Business	
	1st Bank Sidney & Broadus MT	
	1st Bank Yuma	
	1st Capital Bank	
	1st Choice Community FCU	
	1st Colonial Bancorp	
	1st Commerce Bank	
	1st Commonwealth Bank of Virginia	
	1st Community Bank Corpus Christi	
	1st Community Bank-Sherrard	
	Questions?	
	Questions	
	What do I do if my financial institution is not listed?	
	Tell me more about online banking.	
	Cancel	Pack Novt
	Cancel	Back



- 3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
- The Online Banking Assistant window displays during setup. Select Yes, my account has been activated for QuickBooks online services, then click Next.

000	Online Banking Assistant			
Account activation required by Sound Credit Union				
	Have you contacted Sound Credit Union to activate your account for QuickBooks services?			
	● Yes, my account has been activated for QuickBooks online services. ○ No, I need to contact them to activate my account for QuickBooks online services.			
	Note: If you need to contact Sound Credit Union, you can view their contact information by clicking Next.			
(	Cancel Back Next			

5. Enter your Sound Online Banking credentials and click **Sign In**.

000		Online Banking Assistant
	Log in to Sound Cro	edit Union
	Customer ID:	testing
$\frown$	Password:	••••
	Confirm Password:	
		Add Password to Keychain
		To sign in to Sound Credit Union with a secure Internet connection, click Sign In.
	Need a custome	r ID and password?
	Your QuickBooks	login is the same as the login to your Sound Credit Union website.
(		
	URL: https://www	w.soundcu.com
	Phone: 253-383-	-2016
	No fees for state	ment download
	Cancel	Back Sign In



6. For each account you wish to download into QuickBooks, click **Select an Account**.

Select the Sound Credit	Union accounts y	ou want to cor	nnect to QuickBooks	
Now you need to link eac transactions from your b you've linked to the bank	ch of your bank acco ank account, the tra < account.	ounts to a QuickE nsactions are sto	Books account. When you import ored in the QuickBooks account	
Account Name	Account Number	Account Type	Store in the OuickBooks Account	
PRIME SAVINGS S11 FREE CHECKIN VISA BLUE VISA PLATINUM VISA GOLD		Savings Checking Creditline Creditline Creditline	<ul> <li>✓ Select an Account Checking</li> <li>Savings</li> <li>New</li> <li>Select an Account</li> </ul>	

- 7. Click **Next**.
- 8. Click Done.