

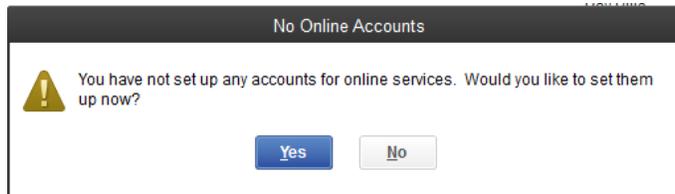
QuickBooks for Windows Getting Started Instructions

QuickBooks Direct Connect

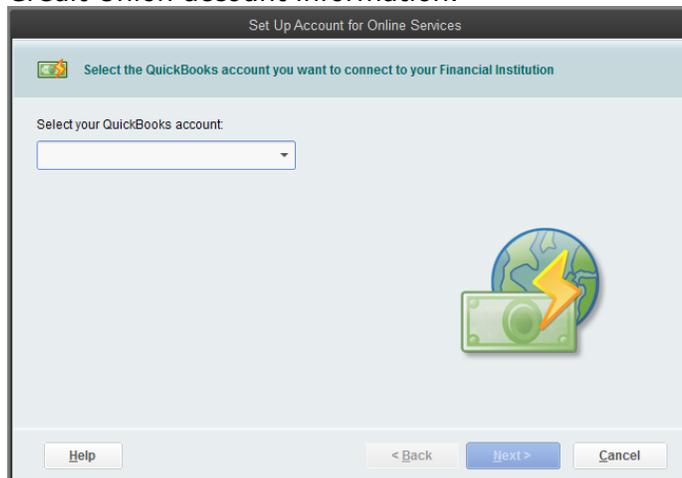
Documentation and Procedures

Task 1: Connecting to Sound Credit Union Direct Connect

1. After logging into QuickBooks, choose Banking Menu → Online Banking → Set Up Account for Online Services. In QuickBooks 2014 choose Banking Menu → Bank Feeds → Setup Bank Feed for an Account.
2. Two new windows will pop-up, please select 'Yes' on each.



3. Select your QuickBooks Account or add a new account to sync with your Sound Credit Union account information.



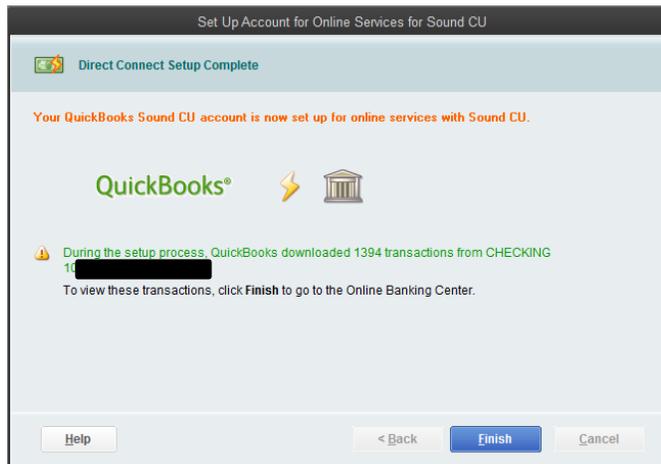
- Type in 'Sound CU' into the search box for the financial institution name. In the results, select Sound CU. **NOTE: Do NOT choose Sound Credit Union—it's for Web Connect, which is being phased out.**

- Enter your Sound Online Banking User ID and Password.

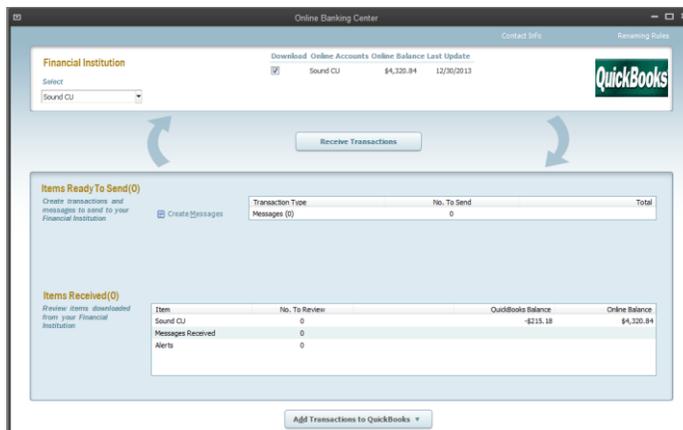
- Once the loading bar disappears, the accounts that are added will display.

ACCOUNT NAME	ACCOUNT NUMBER	ACCOUNT TYPE	ROUTING NUMBER
SAVINGS 00	[REDACTED]	Savings	325183220
CHECKING	[REDACTED]	Checking	325183220

7. Select one account and click 'Next'.



8. Repeat steps 4-7 for any additional accounts you wish to sync with QuickBooks.
9. Once completed, you can update your transactions at any time by clicking on 'Receive Transactions' from the Online Banking Center in QuickBooks.



10. Each time you sync, QuickBooks will prompt you for your PIN which is your Online Banking password.

