

# QuickBooks 2016 Getting Started Guide for Financial Institutions

Financial Institution Support – OFX Connectivity Group

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# QuickBooks 2016 for Windows Getting Started Guide

#### Thank you for choosing QuickBooks!

# **About this Guide**

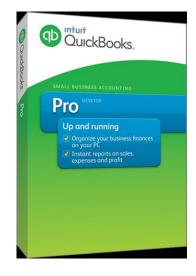
This guide helps you get started with QuickBooks as quickly as possible. You'll learn:

- What you will need to get started
- How to set up an account for online banking (Direct Connect)
- How to set up an account for online banking (Web Connect)
- An overview of online banking modes and the Online Banking Center
- How to update an account (Direct Connect)
- How to update an account (Web 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).



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### **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.

# New in QuickBooks 2016

QuickBooks 2016 delivers interface and support improvements that will significantly improve the customer experience.

# **Batch Delete/Void Transactions Utility**

With this utility any QuickBooks Accountant or Enterprise QuickBooks users (admin/external accountant only) will be able to remove many Invoices, Bills, and Check transactions in just a few clicks!

- Only runs in Single User Mode, does not remove paychecks, deposits, online transactions that have been sent, invoices with reimbursable expenses, or transactions in a closed period.
- Located under the Accountant tab.

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6			what a thia!		ed transactions PAYE			-		
OW TRANSACTIONS	BY Entered date	▼ FOR All		▼ FROM		то				
of 521 Selected										
ENTERED DATE	LAST MODIFIED DAT	E PAYEE	TYPE	NUMBER	TRANSACTION DATE	CLR	ACCOUNT	MEMO	LINKED TRNS V	AMOUNT
7/30/1999	12/15/2019	Abercrombie,	Check	476	12/1/2020		Checking		CREDMEM	-711.15
12/15/2003	12/15/2019	Patton Hardwa	Bill Pmt-C	503	12/15/2020		Checking	Bill #35698	BILL	-754.50
12/15/2003	12/15/2019	Perry Window	Bill Pmt-C	504	12/15/2020		Checking		BILL	-6,935.75
12/15/2003	12/15/2019	Timberloft Lum	Bill Pmt-C	507	12/15/2020		Checking	1890-76	BILL	-1,358.00
12/15/2003	12/15/2019	Timberloft Lum	Bill Pmt-C	510	12/15/2020		Checking	1890-76	BILL	-896.00
12/15/2003	12/15/2019	East Bayshore	Bill Pmt-C	508	12/15/2020		Checking		BILL	-1,476.23
12/15/2003	12/15/2019	East Bayshore	Bill Pmt-C	511	12/15/2020		Checking		BILL	-696.52
12/15/2003	12/15/2019	Patton Hardwa	Bill Pmt-C	512	12/15/2020		Checking	RC 93	BILL	-400.00
12/15/2003	12/15/2019	Timberloft Lum	Bill Pmt-C	513	12/15/2020		Checking	1890-76	BILL	-1,610.00
12/15/2003	12/15/2019	Daigle Lighting	Bill Pmt-C	502	12/15/2020		Checking		BILL	-640.92
12/15/2003	12/15/2019	East Bayshore	Bill Pmt-C	506	12/15/2020		Checking		BILL	-1,631.52
12/15/2003	12/15/2019	Lew Plumbing	Bill Pmt-C	505	12/15/2020		Checking	5-487	BILL	-45.00
40/45/0000	10/15/2010	E+ D	D:= D-++ O	100	10/10/0000		01	11-10-1 T-11-1	D	500.07
Transactions line	ked to the highlighted	check							Showin	ıg 1 - 250 of 521 <b>4</b> i
you delete or void th	his check, QuickBooks	will unlink these transact		won't delete or	void them.					
YPE •		NSACTION DATE MEMO	)				AMOUNT			
Credit Memo	4002 12/0	01/2020					711.15			

# **Remove Send Forms**

- Click File > Send Forms
- Notice that the Send Forms screen now shows about how long it will take to send all the emails that have been selected. (This does not show up if outlook is the default email)

Note: This **does not work** if you use QuickBooks email.

Note: If transactions were created with Sales Tax was turned off, any attempts to remove those transactions from the Send Forms window AFTER Sales Tax is turned on will result in an Unrecoverable Error.

						Send Forms			
elec	t the email(s) you	want to	send and	click Send Now			FROM		•
of 2	Selected				< 2 email(s) t	o Send	то	Cc: B	:c:
<b>V</b>	SEND TO	TYPE STMT	NUM	DATE 07/29/2015		1.00	TTACH	Statement from Poke World6452.pdf	)
	Bill's Lighthouse	INV	510	08/12/2015	\$2,00	ТЕМ		Attached 60KB of 2MB limit Basic Statement Statement from Poke' World	•
							BODY	Dear Customer: Your statement is attached. Please remit payment at your earliest convenience. Thank you for your business - we appreciate it very much. Sincerely, Poke' World 1234567890	
	emove							Check Spelling	

# **New Verify/Rebuild Feature**

- From our Product Information window, we now have the option to review previous verify and rebuild results in the bottom right corner.
- This will take you to two screens that show both errors found and errors fixed or not fixed.

Product QuickBook	s Accountant Desk	top 2016 Release	eR1P		
Product number User Licenses	6837-0148-6375-2 919-282 3 06/17/2015		TIVATED	SERVICES INFORMATION AuthID Company Realm ID Online Billing Token Shopping Source Toke	null
Audit Trail E FILE INFORMATION Location C:\Users\P	nabled since 12/15 Public\Documents\lr Files\QuickBooks 2 gbw	ntuit\QuickBooks\	Sample duct-based h File 7/07/2015	INTEGRATED APPLICATIO # of apps Last accessed 0 CONDENSE INFORMATIO Last run Last as of date Last payroll deleted Last inventory deleted List Information Total Accounts: 116 Total Names: 212 Customers: 146 Vendors: 54 Employees: 3	4 2/17/2011 06:54:41
Server Port Server IP Server Name # of Users Logged In Current Cache Size Max Cache Size	0 172.20.31.74 QB_data_engine_ 1 512 1024	_26		Free Memory	3042044 K
LOCAL SERVER INFORM Hosting: Initial Cache Cache		Server IP Server Port Server Name	ок	DB Engine versio Review last Verify /	
		6			

# **Bill Tracker**

The QuickBooks 2016 **Bill Tracker** is a new tool that allows you to easily see the status of your unpaid transactions. You can also use some new tools in the Bill Tracker to make managing your payables easier and more efficient.

VEGLLED	UNPAD				PAID
0.00 e purchase orders	779,197. 31 OPEN BLL		779,197.69 st overdue		263.00 4 PMD DI LAST DI DAVE
NDOR All	• TYPE AI	- STATUS All	- DATE AI		GROUP BY NOTE
VENDOR	TYPE	NUMBER OFF	DUE DATE .	STATUS	AMOUNT DUE ACTION
T Sing	Bil	6/30/2015	4/30/2015	Overdue	547.00 Pay Bill
Tibetan Monk	80	6/30/2015	5/15/2015	Overdue	95,598.69
- Sing	Bit	6/30/2015	5/30/2015	Overdue	547.00
Absolute Entertainment	84	6/18/2015	6/18/2015	Overdue	150.00
Sega	DII	6/23/2015	7/3/2015	Overdue	150.00
Allied Leisure Industries	BII	6/24/2015	7/4/2015	Overdue	5,100.00
- Sega	Bill	6/24/2015	7/4/2015	Overdue	9,300.00
Atari Games	84	6/24/2015	7/4/2015	Overdue	300.00
Taito	8/1	6/24/2015	7/4/2015	Overdue	14,400.00
- Namco	BII	6/24/2015	7/4/2015	Overdue	103,500.00
AmeriCorp	Bil	6/24/2015	7/4/2015	Overdue	30,450.00
Visco Games	B#	6/24/2015	7/4/2015	Overdue	150.00
Amutech, LTD.	DII	6/24/2015	7/4/2015	Overdue	150.00
Midway Games	Bill	6/24/2015	7/4/2015	Overdue	69,150.00
Nintendo	Bill	6/24/2015	7/4/2015	Overdue	73,950.00
Midway Manufacturing Co.	Bill	6/24/2015	7/4/2015	Overdue	106,350.00
Thomas Automatics Inc.	Bill	6/24/2015	7/4/2015	Overdue	150.00
Greyhound	BII	6/24/2015	7/4/2015	Overdue	150.00
- Vectorbeam	Bil	6/24/2015	7/4/2015	Overdue	150.00
- Sega	84	6/24/2015	7/4/2015	Overdue	150.00
UPL	BW	6/24/2015	7/4/2015	Overdue	150.00
Capcom	Dil	6/24/2015	7/4/2015	Overdue	200,250.00

# **Connect and Update Your Data**

Before you set QuickBooks to download transactions and make online payments, you may need to contact your financial institution (FI) for the following information:

- Customer ID
- Personal Identification Number (PIN) or password

NOTE:	For QuickBooks Web Connect accounts, use the same customer ID and
	PIN/password as your financial institution website. For Direct Connect, they
	may be different. Please contact your financial institution to verify your Direct
	Connect login information.

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 in the entry field. When your bank appears in the filter results, click it.

Step 1: Find your bank	1 2 3 4 FIND CONNECT LINK DONE
Enter your bank's name	
P Examples: Bank of America, Citibank, American Express.	Or choose from these popular banks
	Bank of America-All Other States Chase Fidelity Bank U.S. Bank - PFM Direct Connect JPMorgan Chase Bank Wells Fargo Bank Capital One Card Services Citil Cards Discover Card American Express

3. Depending on your financial institution, after you click your bank name, you may see a screen to select Direct Connect or Web Connect, or you may be asked to enter your credentials.

Enroll in Direct Connect Your bank's Direct Connect service connects your bank accounts to QuickBooks	FIND CONNECT LINK DONE
You're just a few steps away from getting your bank transactions into QuickBooks.         Betting the steps away from getting your bank transactions for Audio Bank of Audio Bank of Audio Bank of Steps Steps Steps Connect Service.*         Betting the steps Steps Steps Connect Service.*         Betting the steps Step	Service provided by http://www.bankofamerica.com (000) 933-6262

4. If you already enrolled in Direct Connect, click **Continue**. The **Step 2: Connect Financial Institution to QuickBooks** screen will appear.

Bank Feed Setup	
Step 2: Connect Bank of America-All Other States to QuickBooks Fees will apply. Want more options? Use Advanced Setup.	FIND CONNECT LINK DONE
Bank of America Online ID For your account Bank of America Online Passcode For your account	Bank of America Service provided by http://www.bank/ofamerica.com (800) 933-6582 Use your Bank of America-Ail Other States user ID and password to sign in here. Click here to activate
How does QuickBooks protect my financial information?	Back Connect

- 5. Enter your credentials and click **Connect** to connect to your bank.
- 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.

tep 3: Link your accounts	FIND CONN	ECT LI
Link your bank accounts with your QuickBoo	ks accounts	
YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS	
Checking	WellsFargo Checking - Bank -	
Checking	Do not add to QuickBooks	
Savings-	Select existing or create new < Create New Account >	1
	Do not add to QuickBooks 10400 - Petty Cash - Bank	-
	WellsEaron Checking - Bank	

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

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

- 1. Log into your financial institution's web site.
- 2. Download your transactions according to your financial institution's instructions.

If you are given a choice for your download format, choose "QuickBooks Web Connect (\*.QBO)" and save the file to your computer.

NOTE:	These instructions assume you will save the download to your computer. If you
	"open" it instead, your web browser should open QuickBooks and begin to
	import the transactions. If you plan to open the file directly, we recommend
	that you have your Company file open in QuickBooks 2016 before you begin
	Step 2.

- 3. Open QuickBooks and your Company file.
- 4. Choose **Banking** menu > **Bank Feeds** > **Import Web Connect File**. You will see an import dialog.

Irganize • New fo	older				-	• [	1 6
Favorites	Name	Date modified	Туре	Size			
Nesktop	BO Files 072012	7/20/2012 1:32 PM	File folder				
🍇 Downloads	Customer file not working.qbo	7/20/2012 9:25 AM	QBO File		134 10		
🔟 Recent Places	Sample of working file.qbo	7/20/2012 9:26 AM	Q80 File		102 K	B	
Music  Pictures  Videos							

5. Navigate to and select the file you downloaded in Step 2, then click **Open**.

	Select Ba	ank Account	×
You are downloading transacti	ions for the follow	ving account:	
- Account type:	First Federal of T Checking 19017819DD online account t		
Please make a selection belo			
Use an existing QuickB	ooks account		Ŧ
Create a new QuickBoo	ks account	Checking at First Federal of T	

You will see a dialog like this one with your FI information.

- 6. Click **Use an Existing QuickBooks Account** if you have an appropriate account in the Chart of Accounts. If you don't have an account yet, click **Create a new QuickBooks account** and enter a name for that account.
- 7. Click **Continue**.
- 8. Click **OK** to confirm and finish.

NOTE:	There is an alternate way of importing a Web Connect file into QuickBooks by
	going to <b>File</b> > <b>Utilities</b> > <b>Import</b> > <b>Web Connect file</b> , navigate to where the
	Web Connect file is located on your computer then click <b>Open</b> .

# **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**.

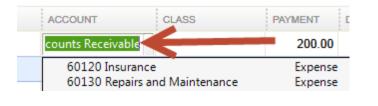
Transaction List

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.



**NOTE:** For more details about working in the Transaction List window, please refer to the QuickBooks In-Product Help Article titled Bank Feeds Center window.

# 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.

Last update: Over	rayearago 🚺 👻
	Sync this account
	Sync all for this bank

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

# Updating an Account (Web Connect) – 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 **Refresh Account** to start the update process.

**NOTE:** For Web Connect accounts, QuickBooks will open your financial institution (FI) website. Please log in and download the QuickBooks web connect file (\*.QBO) per the financial institution's instructions. Alternately, you can log into the FI website outside of QuickBooks and follow the same steps below.

- 4. When you begin the web connect download from the FI website, your web browser should give you the option to either "open" the file or "save" it.
  - If you open it, QuickBooks should open and begin the import process.
  - If you save it, you can import it later by going to Banking menu > Bank Feeds > Import Web Connect File, navigate to where the Web Connect file is located on your computer, then click Open.

# **NOTE:** You can also import a Web Connect file into QuickBooks by going to **File** > **Utilities** > **Import** > **Web Connect file**, navigate to where the Web Connect file is located on your computer, and then click **Open**.

5. QuickBooks will then import the online banking transactions and show you a Transmission Summary.

T online banking account updated.	
ONLINE BANKING TRANSACTIONS	
Received 26 new transaction(s) for account Wells Fargo Test 1.	
Print	

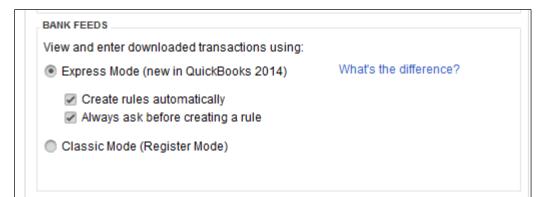
- 6. Review the Online Transmission Summary. You can print the summary or just click Close when done.
- After the Web Connect import, go to Banking menu > Bank Feeds > Bank Feeds Center, select the account, and click on the Transaction List button to view and match the downloaded transactions.

### **Switching Online Banking Modes**

You can easily switch from Express Mode (QuickBooks 2014 and later) to Classic Mode (formerly Register Mode).

1. Go to Banking menu > Bank Feeds > Change Bank Feeds Mode.

You'll see your Company Preferences. In the Bank Feeds area, you'll see your current mode.



2. Click either Express Mode or Classic Mode.

**NOTE:** Express Mode allows you to change your Rule preferences.