

# Setting Up Bank Feeds with Enhanced Online Banking – Direct Connect

- 1. Open Quickbooks.
- 2. Go to Banking/Bank Fees/Bank Feeds Center. If no prior Bank Feeds are enabled then skip to step 6.

	<u>Banking</u> <u>R</u> eports <u>W</u> indow <u>H</u> elp	
	Write Checks     Ctrl+W       Order Checks & Envelopes     Image: Ctrl+R       Enter Credit Card Charges       Use Register     Ctrl+R	
-	Make <u>D</u> eposits <u>T</u> ransfer Funds Reconci <u>l</u> e	nformation
۱.	Bank Feeds )	Bank Feeds <u>C</u> enter
7	L <u>o</u> an Manager	Set Up Bank Feed for an Account Participating <u>Financial Institutions</u>
1	Other <u>N</u> ames List	Import Web Connect File
L	See Funding Options 40866 transactions	Create a Message for your Bank Change Bank Feeds Mode
		Learn About Online Bill Payment
		Inquire About Online Banking Payment

3. Click on Disable bank feeds. It is important to make sure there are no outstanding transactions that need to be added to your register before you do this step. If there are, take care of the pending transactions and then click on disable bank feeds.



4. Click on Deactivate All Online Services, then click Save & Close.

			Edit Account		_ 🗆 ×
	Account <u>T</u> ype	Bank	•		
G	eneral B	ank Feed Settings	•		
Acco	ount Name Che	cking at Peoples B	ank of Co		
Ac	ctivate Online <u>S</u> er	vices			
- C	CONNECTION INFOR	MATION			
	Financial Institut	ion Peoples Ba	nk of Commerce_QB		
	Account Custom	er ID nh	offmansteel	ICKBOOKS	
	Last Download:	02/28/2019 (4086)	6 transactions)		
0	State <u>m</u> ent Dow	mloads ments			
• <u>D</u>	eactivate All Onlin	e Services			
	If you deactivate :	all services, you wi	II have to set them up for this account a <u>c</u>	jain.	
Acc	count is inactive			S <u>a</u> ve & Close	Cancel

5. Click OK.



6. Go to Banking/Bank Feeds/Set Up Bank Feed for an Account.

<u>Banking</u> <u>R</u> eports <u>W</u> indow <u>H</u> elp	
Write Checks       Ctrl+W         Order Checks & Envelopes       I         Enter Credit Card Charges       I         Use Register       Ctrl+R         Make Deposits       Iransfer Funds         Reconcile       I	VENDORS
Bank Feeds )	Set Up Bank Feed for an Account
L <u>o</u> an Manager Other <u>N</u> ames List	Participating <u>F</u> inancial Institutions Import <u>W</u> eb Connect File Change Bank Feeds Mode
See Funding Options	Learn About Online Bill Payment

7. Click Yes.

Temporarily Close All Windows				
All open QuickBooks windows will be closed temporarily to set up Bank Feeds services. Do you want to continue?				
<u>Y</u> es <u>N</u> o				

8. Type in Peoples Bank of Commerce in the field for Enter Your Bank's Name. Click Next until you get to Showing 34-44 of 52 and then click on People's Bank of Commerce.

Bank Feed Setup	
Step 1: Find your bank	1 2 3 4 FIND CONNECT LINK DONI
Enter your bank's name	
Peoples Bank of Commerce	Or choose from
Examples: Bank of America, Cilibank, American Express.	these popular banks
Matching Results	Bank of America-All Other States
National Bank of Commerce-Superior	Chase
Nebraska Bank of Commerce	Fidelity Bank
North Shore Bank of Commerce-MN	U.S. Bank - PFM Direct Connect
People's Bank of Commerce	JPMorgan Chase Bank
Plains Commerce Bank DC Bus	Wells Fargo Bank
Plains Commerce Bank Retail	Capital One Card Services
Plains Commerce Bank WC Business	Citi Cards
Redding Bank of Commerce	Discover Card
Seacoast Commerce Bank - Bus	American Express
Showing 34-44 of 52   Previous Next	

9. Type in your Username and Password then click Connect

E Bank	Feed Setup 3
Step 2: Connect People's Bank of to QuickBooks No fees apply. Want more options? Use Advanced Setup.	f Commerce
Username For your account          I         Password For your account	Service provided by https://www.peoplesbank.bank 541-776-5350 Use your People's Bank of Commerce user ID and password to sign in here.
How does QuickBooks protect my financial information?	Back Connect

10. From the dropdown, select the appropriate account you want to link the account in online banking to in Quickbooks. Click Connect once the account(s) have been selected.

a Ba	nk Feed Setup
Step 3: Link your accounts	FIND CONNECT LINK DONE
YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS
Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Checking-Che	Select existing or create new
Checking- 00 (XXXXX 5200) Checking- 000 (XXXXX 6000) Checking- 000 (XXXXX 7800)	Select existing or create new
Service provided by https://www.peoplesbank.bank 541-776-5350	×
	Back Connect

11. You will then get a summary screen that says Success! Click Close.

	Bank Feed Setup		
Success!		FIND CONNECT LINK E	4 ONE
Your People's Bank of Commerce a	ccounts have been added to QuickBooks		
YOUR BANK ACCOUNTS		STATUS	
Checking-	Checking at Peoples Bank of Co	Added	
Service provided by https://www.peoplesbank.bank 541-776-5350	WHAT Add Dowr	"S NEXT? accounts from another bank nload your transactions from Bank Fee	ds
		Close	

### 12. Go back to Banking/Bank Feeds/Bank Feeds Center



#### 13. Click Download Transactions

Account Information		LAST UPDATE: 1 day(s) ago 49 💌
Peoples Bank of Commerce_QB ACCOUNT ENDING IN ***	In QuickBooks ENDING BALANCE Checking at Peoples Bank of Co	
\$3,944,044.46	\$173,783.09	
There are no transactions to review.		Download Transactions

#### 14. Enter your password to Online Banking, then click OK

Access to Peoples Bank of Commerce_QB		
QuickBooks		
Enter your PIN/ Password		
OK Cancel Help		

15. Click Close or Print depending on your preference

Online Transmission Summary	×
1 online banking account updated.	
ONLINE BANKING TRANSACTIONS	
Received 896 new transaction(s) for account Test Account.	
Print <u>C</u> lose	

## 16. Click on Transaction List to review and add transactions to the register.

Account Information		LAST UPDATE: Today 47 -	•
Peoples Bank of Commerce_QB ACCOUNT ENDING IN **	In QuickBooks ENDING BALANCE Test Account		
\$50,000.00	\$0.00		
896 transactions are waiting to be added to QuickBooks.		Transaction List	