



Refer to the Getting Started Guide for instructions on using QuickBooks' online account services; to save time, improve accuracy, and keep your records updated. This guide will specifically show you how to download transactions.

The Getting Started Guide includes the following information:

Information You will Need to ..

Get Started- Provides a listing of the information you will need to have on hand before downloading transactions into QuickBooks.

Setting Up Online Account Access- How to set up transaction downloads for your QuickBooks accounts.

Keeping Your QuickBooks Accounts Updated- How to automatically download transactions into QuickBooks.

Information You'll Need to Get Started

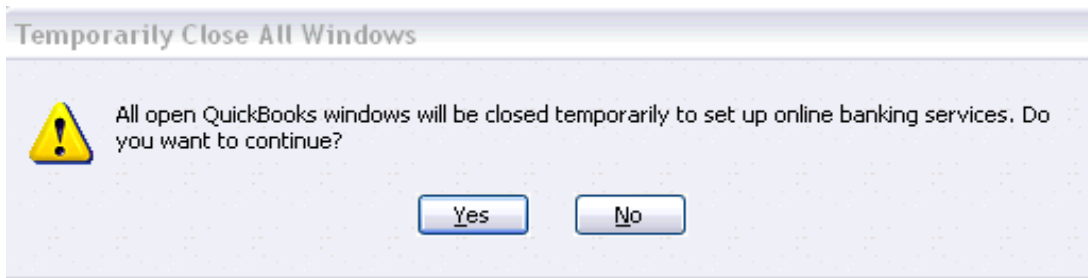
Before you enable your QuickBooks accounts to download transactions you will need your Silver Express Internet banking login information.

Customer ID

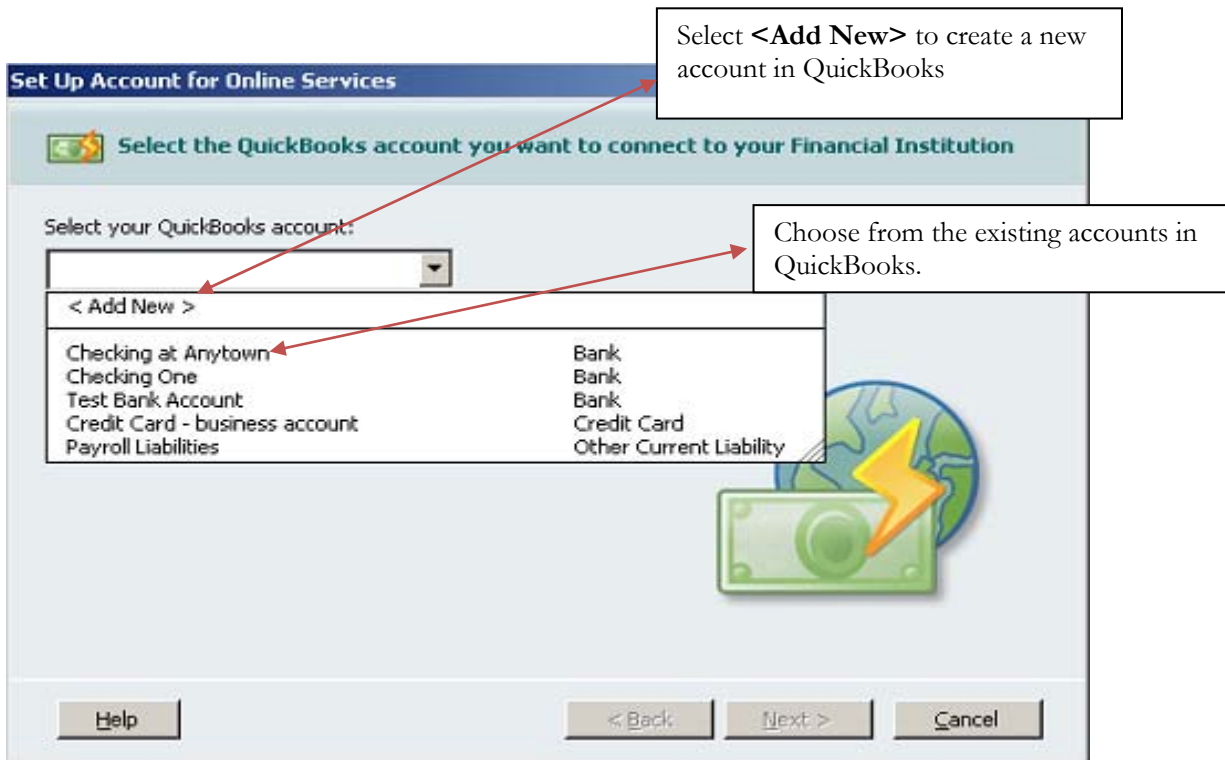
Personal Identification Number (PIN) or password

Setting Up Online Account Access

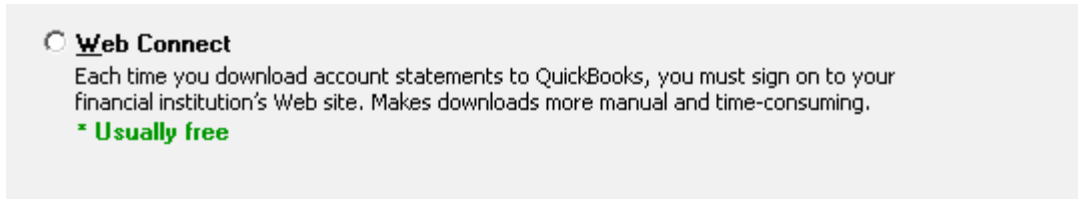
1. Go to the Banking drop down menu in QuickBooks → Online Banking → Setup Account for Online Access.
2. You will be prompted to close all QuickBooks windows, click YES to continue.



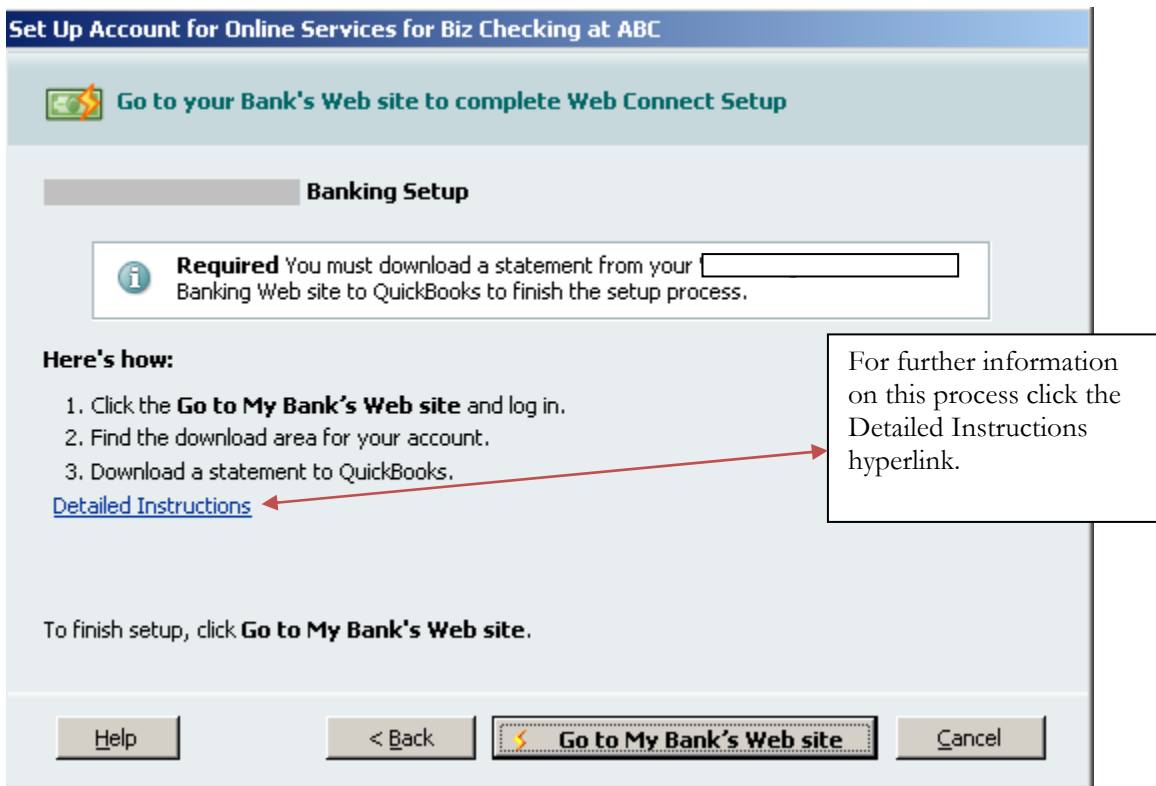
3. The Set Up Account for Online Services window will appear → click the drop down arrow for options to choose from or create a new account → click next to continue.



4. Select your financial institution →click next.
5. Silver Lake Bank supports Web Connect downloads within QuickBooks. You will be prompted to select your preferred method, select Web Connect.



6. You will see the window below →click on Go to My Bank's Web site →QuickBooks will launch a web browser directly to your financial institution's website.



See the following sections for an overview on **Keeping Your QuickBooks Accounts Updated and Sending Online Payments**.

Keeping QuickBooks Accounts Updated

1. Once in the Online Banking Center (Banking drop down menu → Online Banking → Online Banking Center), you can download transactions to keep you QuickBooks accounts up to date.
2. Click the Send/Receive Transactions → Enter your password to download transactions from your financial institution.
3. Once transactions are downloaded from your financial institution you can add them to QuickBooks by clicking the Add Transactions to QuickBooks button.

The screenshot shows the 'Online Banking Center' window. At the top, there are links for 'Contact Info', 'Video Tutorial', and 'Renaming Rules'. Below this, the 'Financial Institution' section has a dropdown menu set to 'Anytown Bank'. The 'Online Accounts' section shows 'Checking' with a balance of '\$19,801.81'. A red box highlights the 'Send/Receive Transactions' button, with a callout box stating: 'Click **Send/Receive Transaction** to download transactions from your financial institution.' Below this, the 'Items To Be Sent (0)' section includes options like 'Write Online Checks', 'Transfer Funds', 'Pay Bills', and 'Create Messages'. A table shows transaction types: Online Checks, Transfers, Bill Payments, and Messages, all with 0 items to send. The 'Items Received (4)' section shows a table with columns 'Item', 'No. To Review', and 'QuickBooks'. The 'Checking' item has 4 items to review and a value of \$2. A red box highlights the 'Add Transactions to QuickBooks' button, with a callout box stating: 'To update QuickBooks with the downloaded transactions, click **Add Transactions to QuickBooks**.'

4. The Add Transactions To QuickBooks window will appear, with a summary of transactions downloaded from your financial institution.
5. Click on the transaction you wish to add to QuickBooks → follow the prompts to insure accuracy → click Add to QuickBooks.