

## Direct Connect Setup Instructions for Business accounts

- 1. Open up <u>Quickbooks Desktop</u> to the main dashboard.
- 2. Select Banking Bank Feeds Set Up Bank Feeds for an Account.
- 3. If you receive the following popup, click Yes to proceed:

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

4. You will be brought to a *Find your bank* window. Search for <u>American National Bank WF Bus</u> and click on the first result that is titled the same.

Enter your bank's name American National Bank WF Bus Examples: Bank of America, Olibank, American Express.	Or choose from
American National Bank WF Bus Examples: Bank of America, Citibank, American Express.	Or choose from
Examples: Bank of America, Citibank, American Express.	these nexular hanks
Matching Results American National Bank WF Bus American National Bank WF Per American National Bank WF Per QBDC	Bank of America-All Other States Chase Fidelty Bank U.S. Bank - PPM Direct Connect JPMorgan Chase Bank Wells Fargo Bank Capital One Card Services Citl Cards Discover Card Express Web American Express
Showing 1-3 of 3	

5. After selecting the correct bank, you will be brought to an *Enroll in Direct Connect* window.



- If you already have an AMNAT Online Banking Login, click continue. If not, please contact Customer Service at 1-940-397-2400 to request Online Banking Credentials.
- 6. Enter your Online Banking username under *Customer ID* and your Online Banking password under *PIN*.

Step 2: Connect American National Bank WF	Bank Feed Setup 🗶	
	ican National Bank WF	
Customer ID       For your account         I       Strike provided by the showed and the showed	Circle Books	
How does QuickBooks protect my financial information?	Back Connect	

7. After logging in, you will be brought to a *Step 3: Link your Accounts* window. Here you will select each account that will be linked to Quickbooks.

Step 3: Link your accounts	FIND CONNECT LINK DONE
YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS
COMMERCIAL A/A-	Select existing or create new
FREEDOM checking	Select existing or create new
Champion Premier-	Select existing or create new
SAVINGS ACCOUNT - CARLER (XX - CARL)	Select existing or create new
AutoLPAALo	
VUICKDUUKS NA	

- 8. If there is an account that you do not want imported into Quickbooks, select *Do Not Add to Quickbooks* from the drop-down menu next to the account.
- 9. To add an account to Quickbooks, select *<create new account>* from the drop-down menu next to the account you want to add. Leave the account type as *Bank* at the top, and proceed to fill out the rest of the fields with the appropriate information.

	Add New Account	
Account <u>Type</u> B:	ank	
Account Name		Select from Examples
OPTIONAL	Subaccount of	
Description		
Bank Acct. No		
Routing Number		
	Enter Opening Balance Should I enter an	opening balance?
	Remind me to order checks when I reach check number	
	Order checks I can print from QuickBooks	earn more

- 10. After you have added the accounts you want connected to Quickbooks, click *Save & Close* and then *Connect*.
- 11. You should be brought to a window that says *Success* and shows you the accounts successfully linked to Quickbooks.

		Bank Feed Setup				
Success!			FIND	CONNECT	LINK	4 DONE
Your American	National Bank WF Bus	accounts have been added to QuickE	Books			
YOUR BANK ACCOUNTS		QUICKBOOKS ACCOUNTS		STATUS		
COMMERCIAL A/A		testing1		Added		
QuickBooks	Service provided by https://www.amnait.com NA	v A	VHAT'S NEXT?	om another ba	ank	
		L	Jownload your	transactions fi	om Bank	Feeds

## Download Transactions/Update Accounts in Quickbooks

- 1. From the Quickbooks main dashboard select Banking Bank Feeds Bank Feeds Center
- 2. You will be brought to a page that looks like the one below:

,	ater   🖪 R	ules			Bank Feeds
nk and	Credit cards	s   American	National Bank WF Bus	🗘 Sync this Bank	
General	Test Acct	្រា	testing1	0 m	
Account e	ending in <b>Read</b>		Account ending in	\$0.00	
In QuickB	ooks	_	In QuickBooks	\$0.00	
Transactio	ns pending for re	view 35	9 Transactions pending for rev	view O	
	Date ↑	Check no 🗘	Downloaded as 🗘	Payee 🗘	Bank memo

3. Click the *Sync* button at the top right of the Account card. The button looks like a Refresh symbol. You will be prompted to enter your Online Banking password.

Access to American National E	ank WF Bus
QuickBooks	
Enter your PIN/ Password	

4. After entering the correct Online Banking password, all transactions for that specified account should populate on Quickbooks.