

# First Federal Transaction Sync for QuickBooks



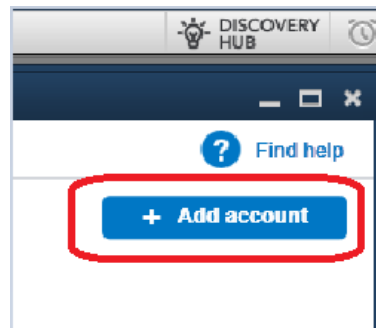
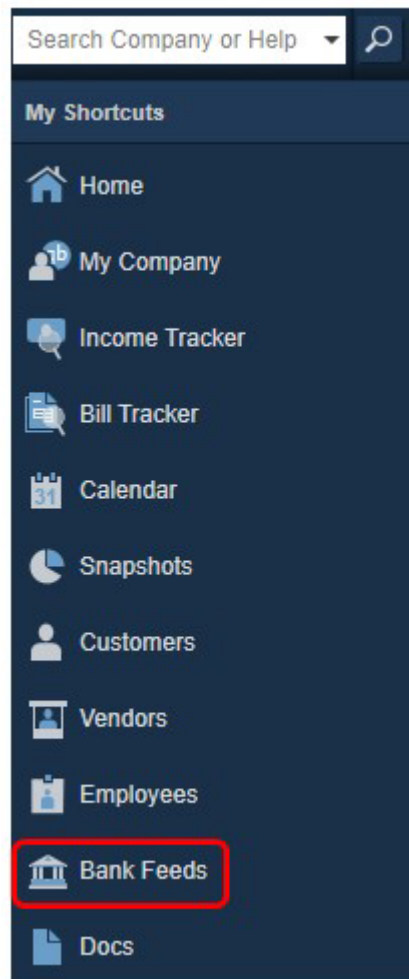
For First Federal Business Online Banking customer only. You can now connect your QuickBooks to your First Federal Business account to automatically synchronize your transactions. This means, if you are currently downloading your transactions and then importing them, you will no longer need to do that if you prefer this new connection method.

To connect your QuickBooks to your First Federal Business Online Banking account follow these steps:

\*Note: There are two different instruction sections, one section for QuickBooks Desktop users and one section for QuickBooks Online users.

## QuickBooks Desktop – How to Add An Account

**Step 1.** In your QuickBooks left hand navigation pane select **Bank Feeds** and then select **Add Account**. When prompted with the Temporarily Close All Windows message, select **Yes**.



**Step 2.** In the Bank Name search field enter **First Federal Yamhill** and select **First Federal Yamhill BO DC**

Bank Feed Setup

### Step 1: Find your bank

1 FIND 2 CONNECT 3 LINK 4 DONE

Enter your bank's name

First Federal Yamhill

Examples: Bank of America, Citibank, American Express.

**Matching Results**

First Federal Yamhill BO DC

Showing 1-1 of 1

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
- Citi Cards
- Discover Card
- American Express

**Step 3.** Enter your First Federal Business Online Banking username and password. (Note: when you change your Online Banking password you will need to update it in your QuickBooks Bank connection as well.)

Bank Feed Setup

### Step 2: Connect First Federal Yamhill BO DC to QuickBooks

No fees apply.

1 FIND 2 CONNECT 3 LINK 4 DONE

Username For your account

Password For your account

**QuickBooks**

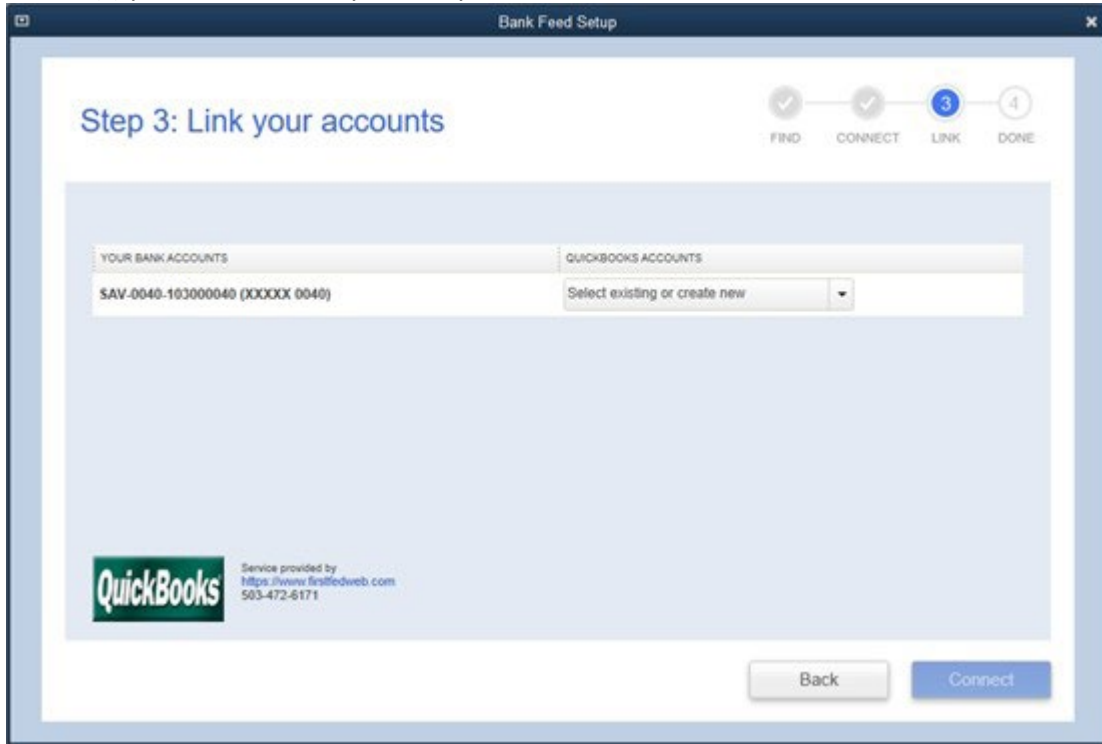
Service provided by  
<https://www.firstfedweb.com>  
503-472-6171

Use your First Federal Yamhill BO DC user ID and password to sign in here.

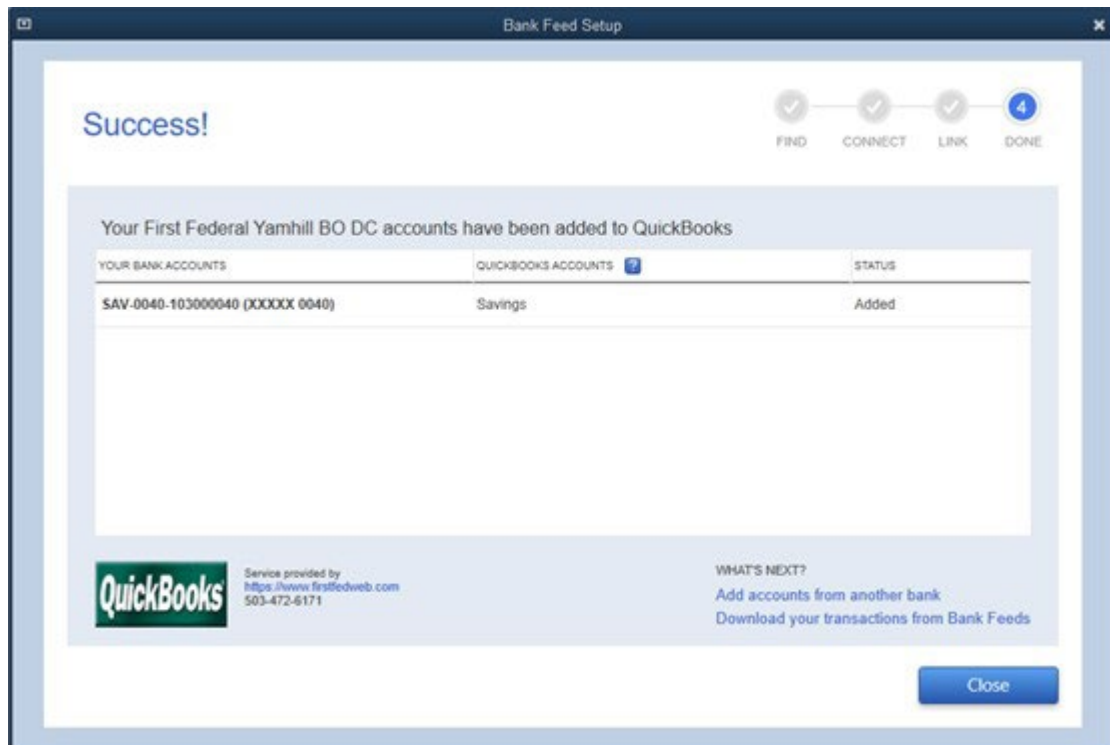
How does QuickBooks protect my financial information?

Back Connect

**Step 4.** Your accounts will show up in the left column, use the drop down menu to select which account(s) you would like to sync with your QuickBooks and then click **Connect**.

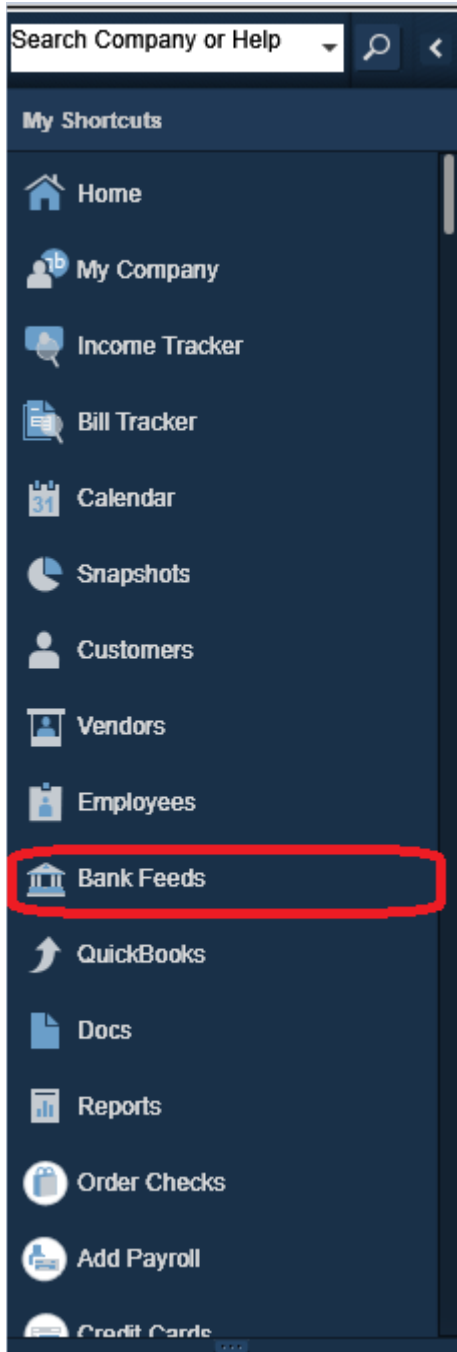


**Step 5.** Your QuickBooks is now connected to your First Federal Business Account, click **Close** to exit the window.



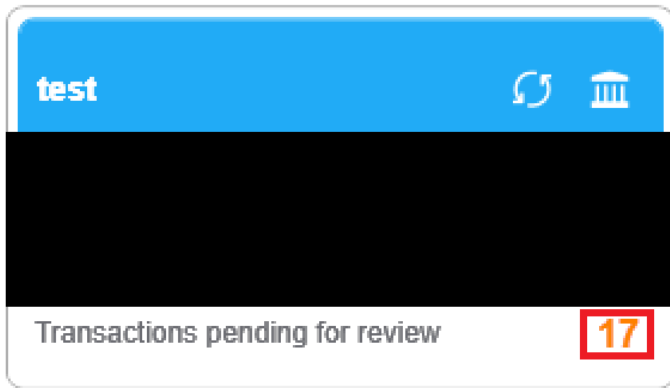
## QuickBooks Desktop – How to Delete an Account

**Step 1.** In your QuickBooks left hand navigation pane select **Bank Feeds** and then select **Add Account**.

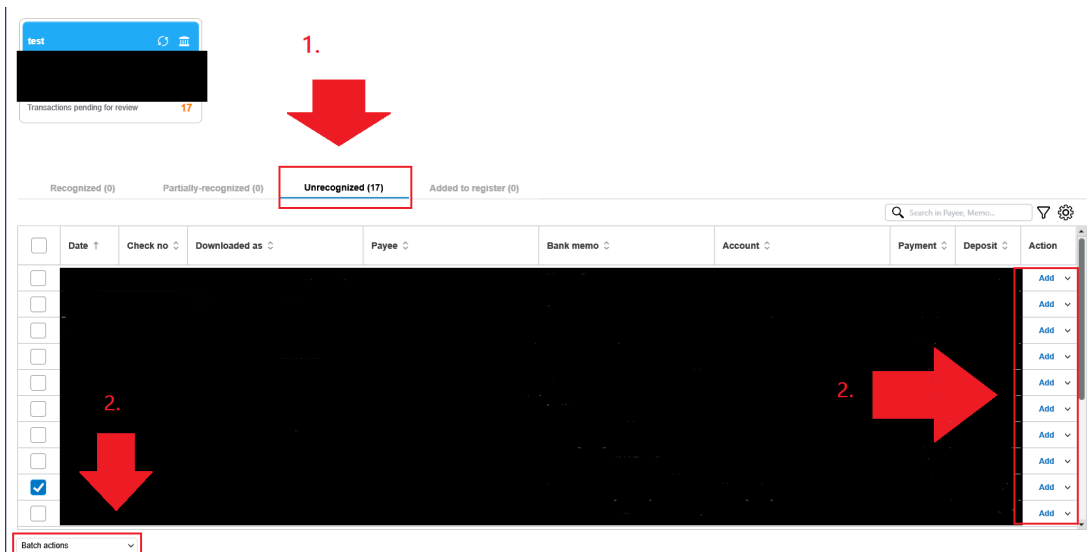


Step 2. If the user logged in as the QuickBooks Administrator (not to be confused with the BOB Senior Admin) and there are no transactions pending/downloading (if orange number to the right of “Transactions pending for review” is anything other than 0, then there are transactions that must be added to the register/downloaded)

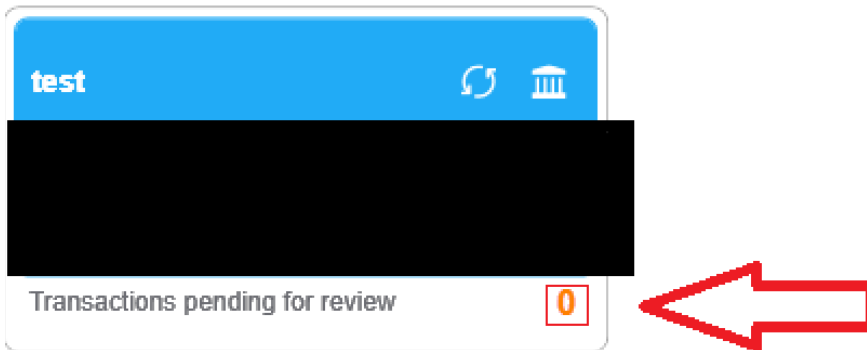
- If the orange number **IS NOT** 0, such as indicated below, follow these steps:



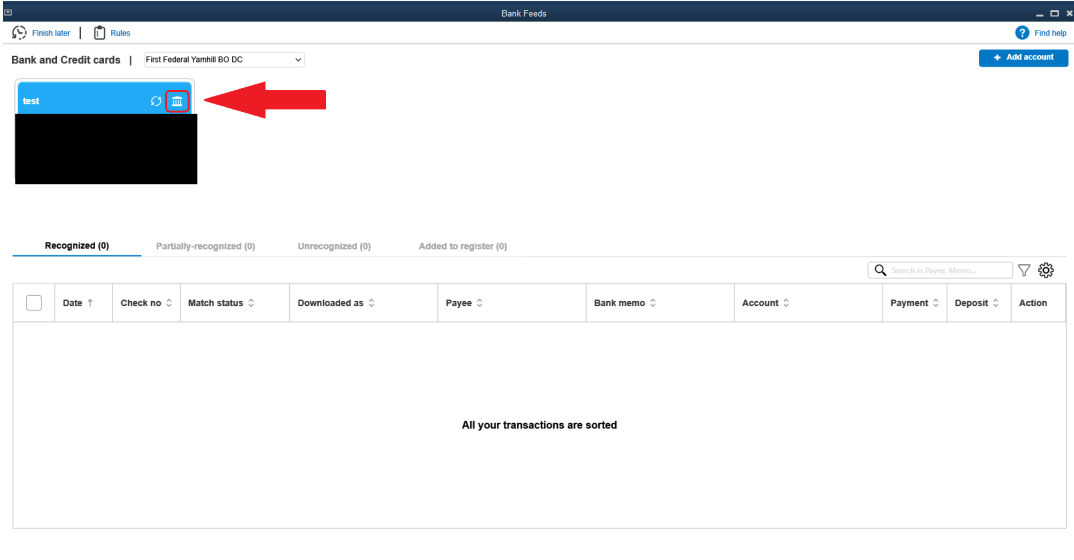
1. Select **Unrecognized (#)**
2. You will now have to decision each transaction. Decisioning can be done either by clicking the downwards arrow to the right of the Add link under the Action column (Options: Add more detail, match to existing transactions, or ignore) per transaction or by selecting the checkbox to the left of the transactions and choose a decision that applies to selected transactions with the batch action (Options: Modify, Add/Confirm, Ignore) on the bottom left of the page.



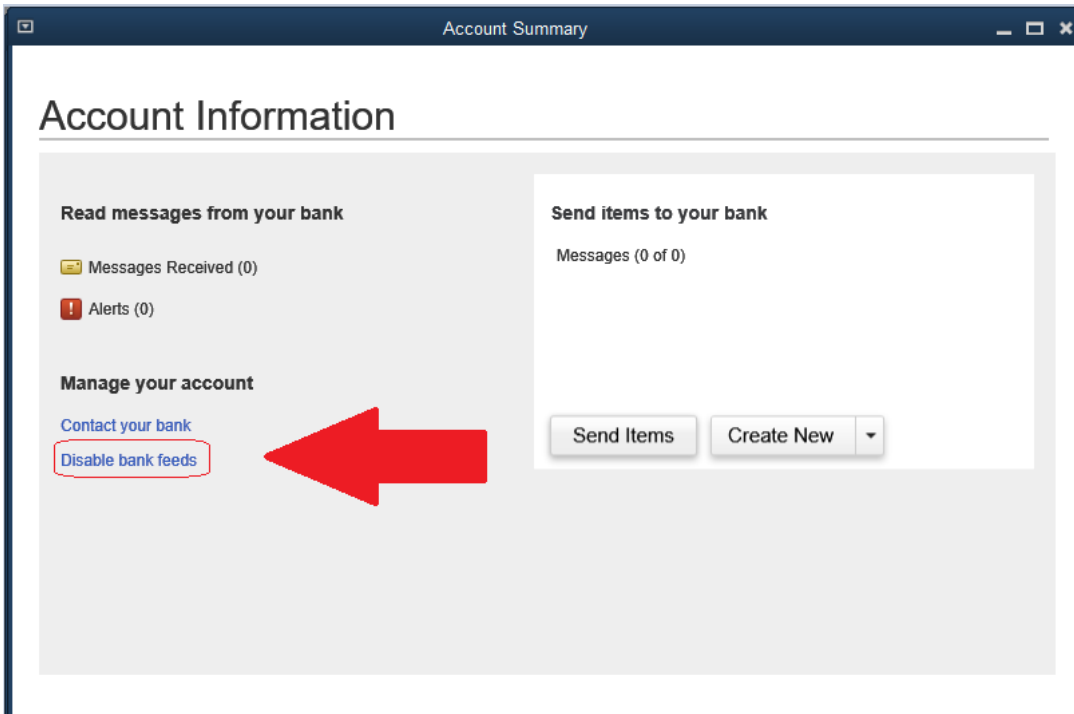
- If the orange number **IS 0**, such as indicated below, then can click along...



1. Select the bank icon to view Account Summary Information.



2. Select **Disable bank feeds**.



3. Select **Deactivate All Online Services**.

Account Type: Bank

General | Bank Feed Settings

Account Name: test

Activate Online Services

CONNECTION INFORMATION

Financial Institution: First Federal Yamhill BO DC

Account Customer ID: [REDACTED]

Last Download: (0 transactions)

Statement Downloads

Online Bill Payments

Deactivate All Online Services

If you deactivate all services, you will have to set them up for this account again.

Account is inactive

Save & Close | Cancel

4. Finally, select **Ok** to confirm deletion of account.

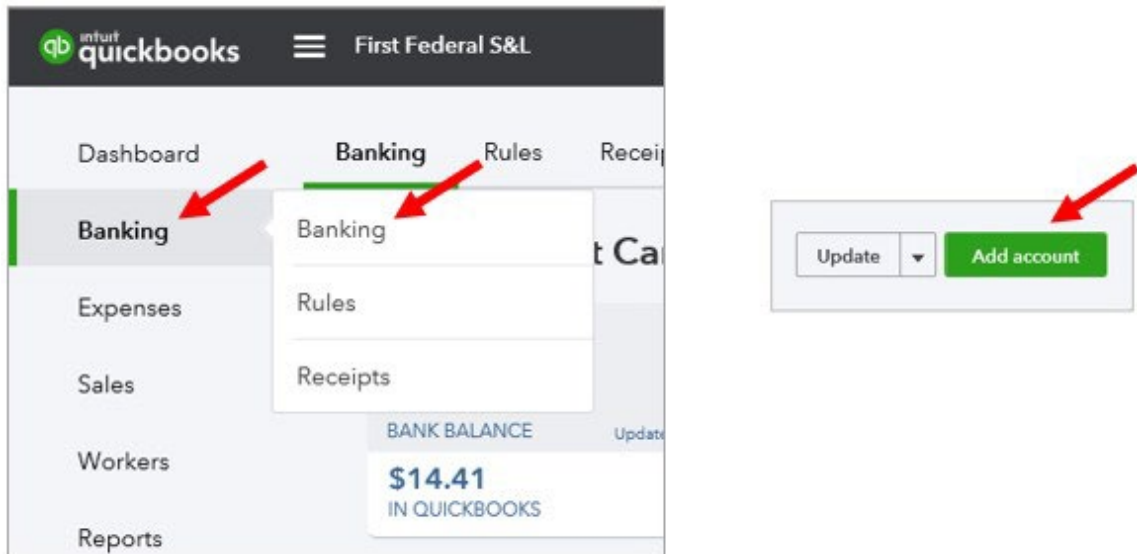
QuickBooks Desktop Information

**i** You have just disabled one or more online services for this account. Please note that this does not cancel the services for which you have enrolled this account at your financial institution. You will continue to be charged for these services until you contact your financial institution directly to cancel them.

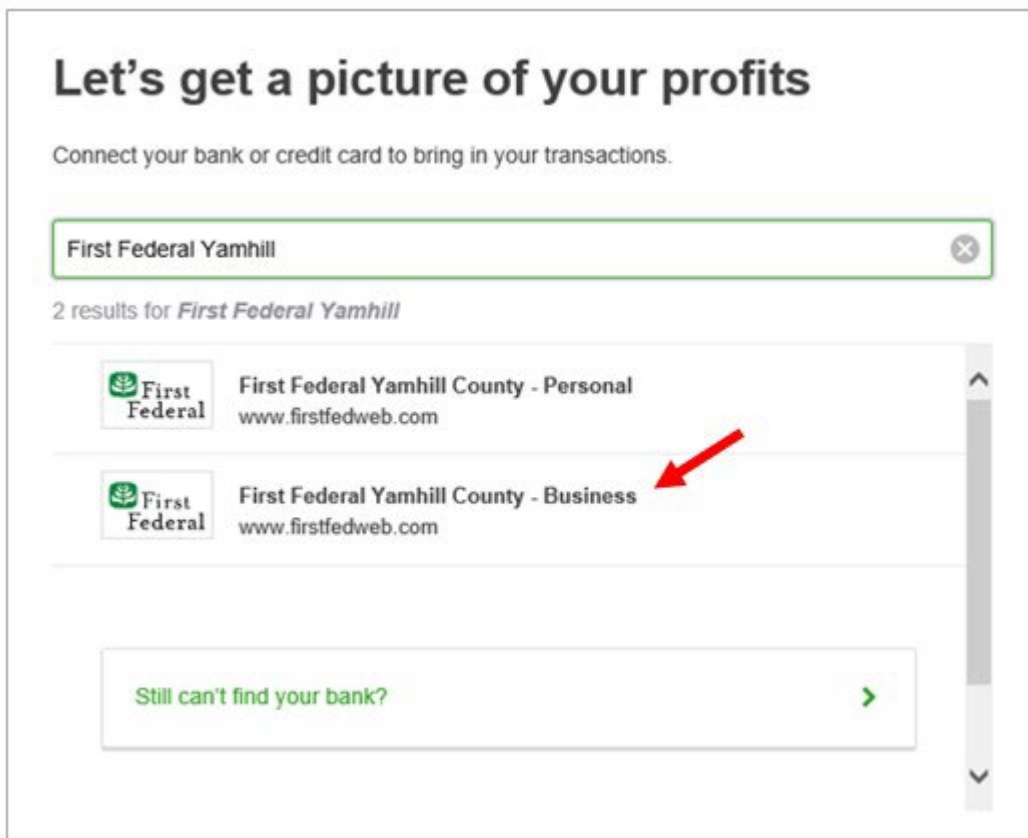
OK

## QuickBooks Online

**Step 1.** In your QuickBooks left hand navigation pane select **Banking** and then **Banking** again from the sub-menu. Then click **Add account**.



**Step 2.** In the Bank Name search field enter **First Federal Yamhill** and select **First Federal Yamhill County – Business**




**Step 3.** Enter your First Federal Business Online Banking username and password and click **Continue**.



(Note: when you change your Online Banking password you will need to update it in your QuickBooks Bank connection as well.)

## Sign in to account



First Federal Yamhill County - Business  
<https://www.firstfedweb.com/>  
(888) 317-8333

**Username**

**This field is required**


**Password**

[SHOW](#)

**This field is required**


**Step 4.** Check the Captcha box and click **Continue**. Your QuickBooks is now connected to your First Federal Business Account

## Sign in to account

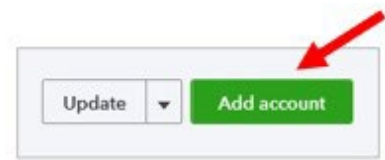


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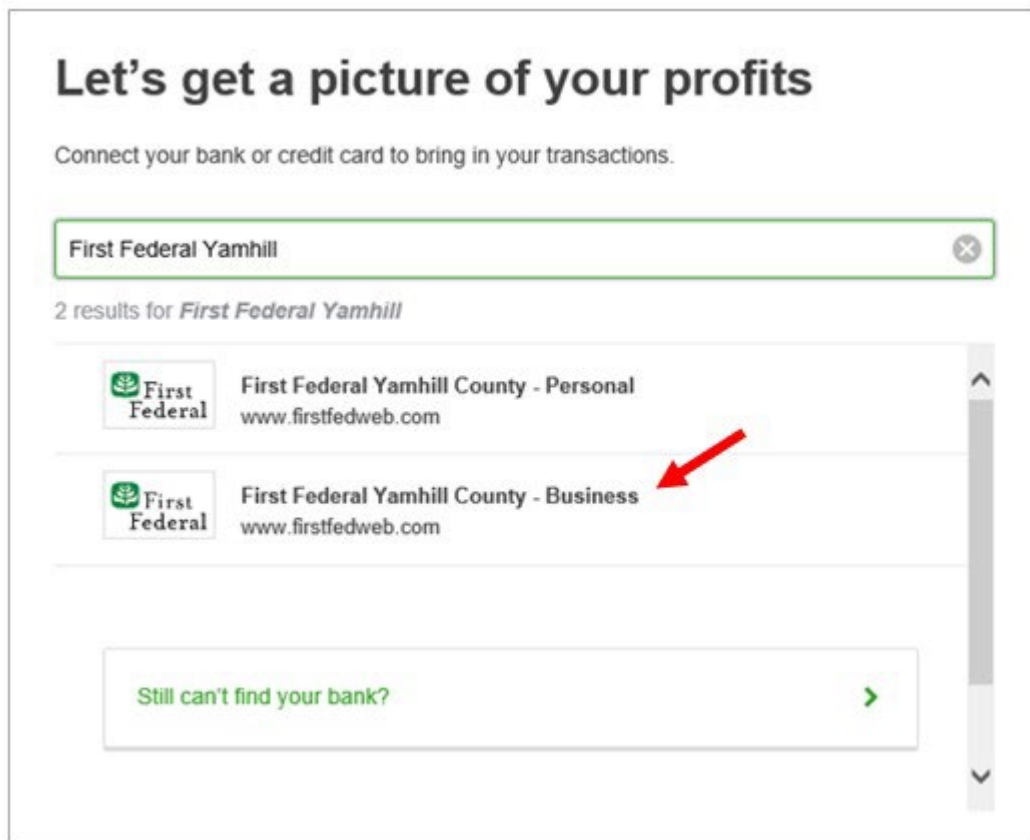
We just want to make sure you're human.

I'm not a robot   
reCAPTCHA  
Privacy · Terms

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