

QUICKBOOKS DESKTOP CONNECTION GUIDE

In this guide, we'll walk you through the steps required to connect your Mountain America account to QuickBooks Desktop.

1. Open QuickBooks Desktop.
2. Click Create a new company.

No Company Open

Select a company that you've previously opened and click Open

COMPANY NAME	LAST MODIFIED	FILE SIZE

[Open](#)
[Edit List](#)

LOCATION:


Create a new company


Open or restore an existing company


Open a sample file


Find a company file

3. Select who you are creating the company file for.



What does creating a company file require?

For creating a company file you need to have an Intuit account, which would provide you:



-  Better control of your data
-  Superior fraud protection
-  One account for all Intuit products

Who are you creating the company file for?

☐ For myself (I'm the admin)
My email will be used to create an Intuit account, which will be used to access all Intuit products.

☐ For someone else
I'm creating the company file on behalf of the admin.

[Start Setup](#)

[Other Options](#) ▼ Open or convert existing files from QuickBooks or other software.

4. Sign in to your Intuit account. If you don't have one, you will need to create one.

5. Enter your business information.

Glad you're here.

Help us customize your settings to offer you the right tools for seamless business experience.

Business Name *

Industry *

Business Type *

Admin's email *

Employer Identification Number (EIN) 12-3456789 Phone

Business Address

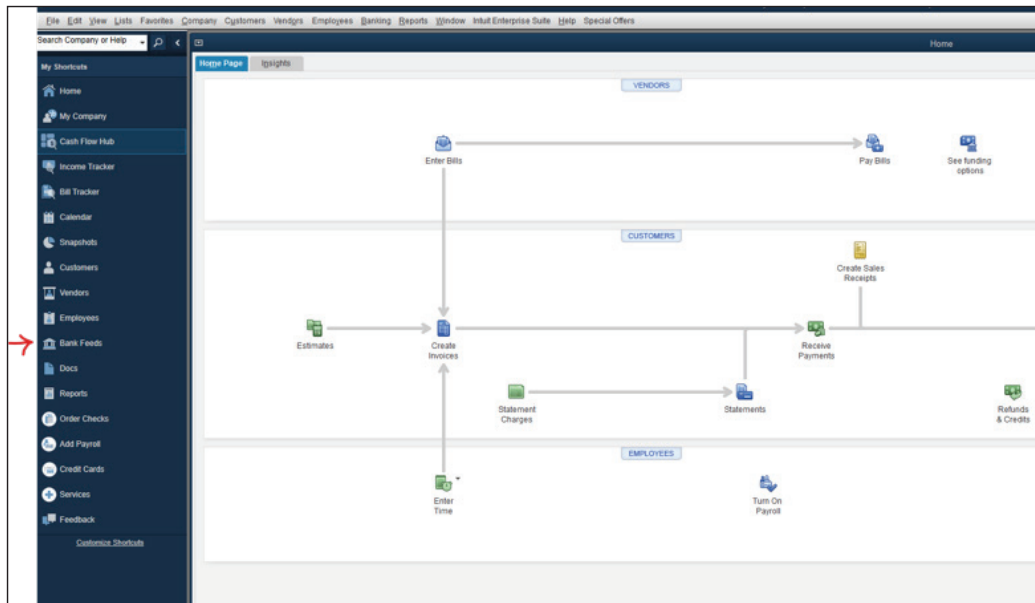
City ZIP

State Select state Country U.S.

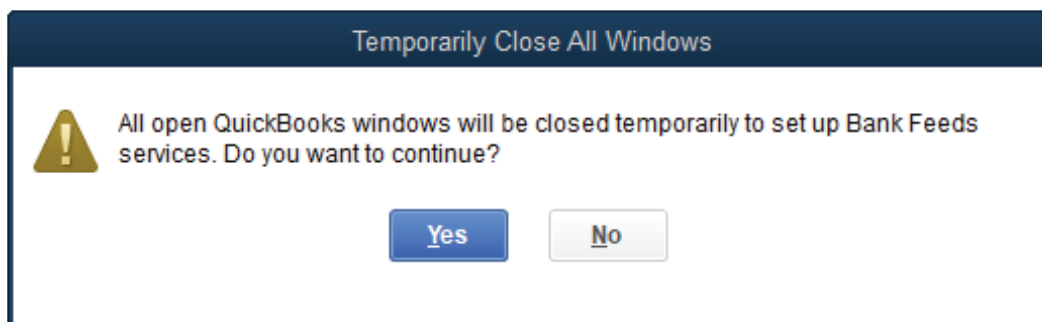
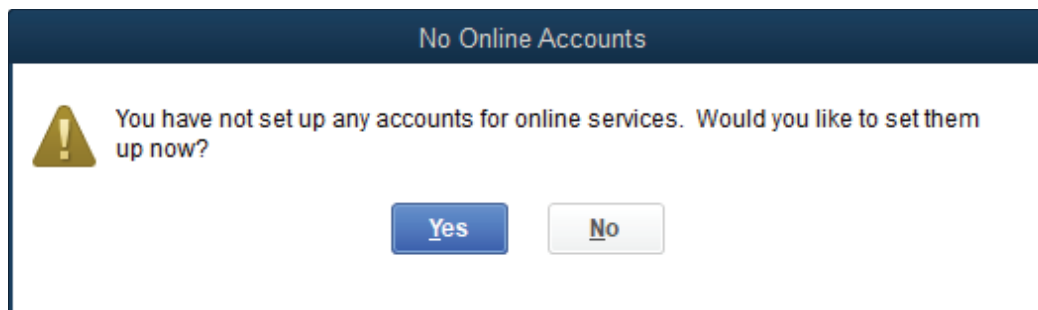
* Required
[Intuit's Privacy Statement](#)

[Back](#) [Create Company](#)

6. Click on Bank Feeds from the left menu.

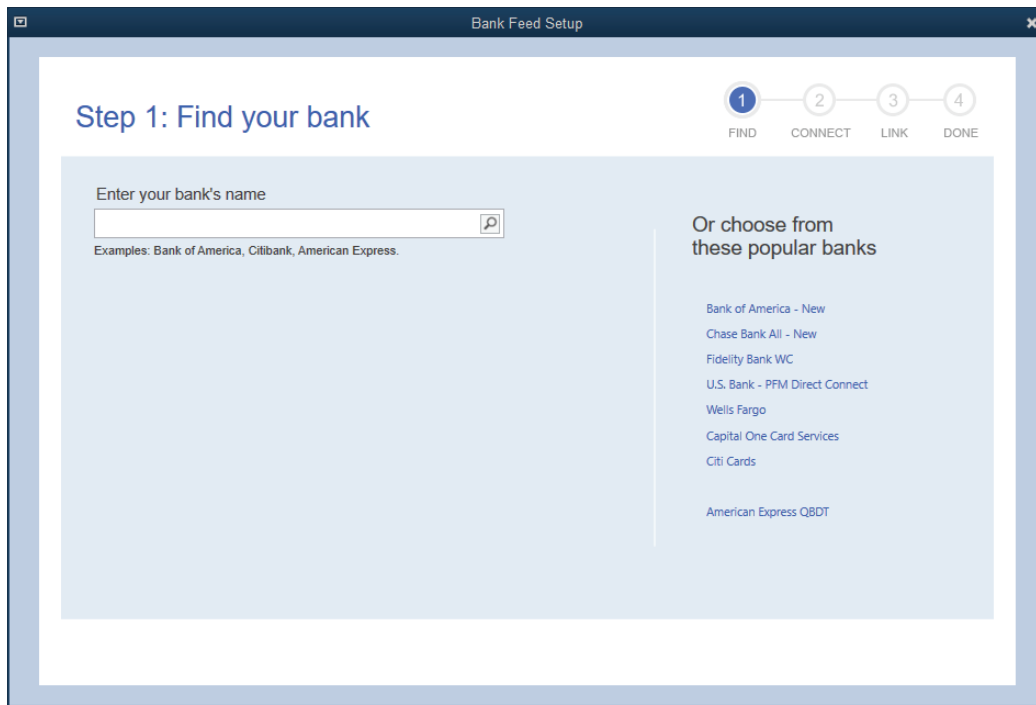


7. Click Yes to set up an account for online services.



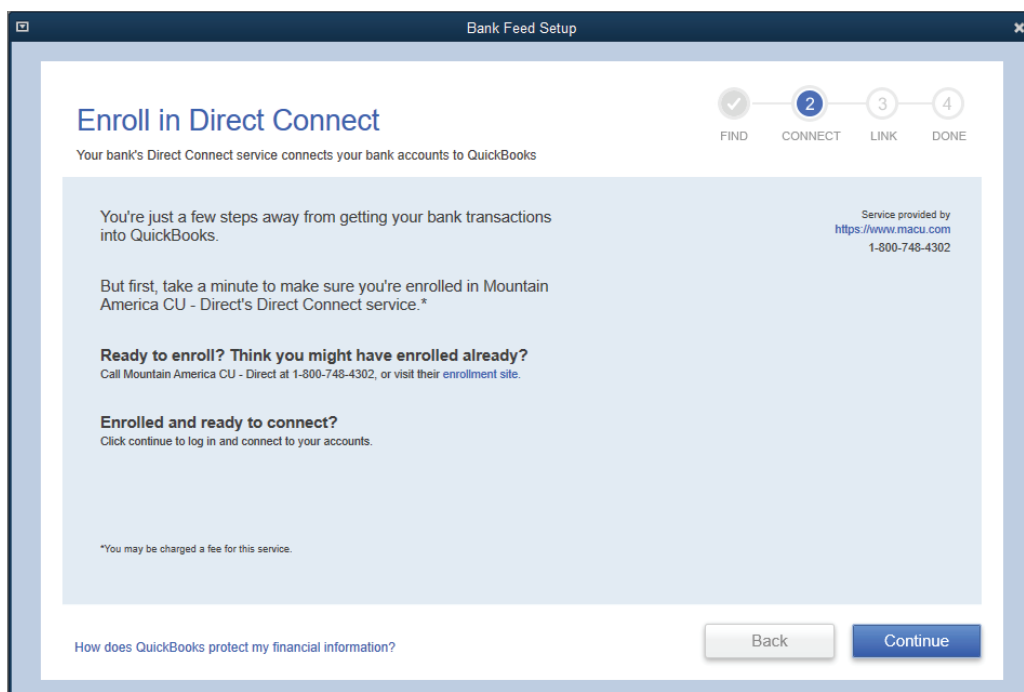
8. Click Yes to close all open QuickBooks windows and set up Bank Feeds.

9. Search for Mountain America and select Mountain America CU–Direct.



The screenshot shows the 'Bank Feed Setup' window with the title bar 'Bank Feed Setup'. The main heading is 'Step 1: Find your bank'. A progress bar at the top right shows four steps: 1 (FIND), 2 (CONNECT), 3 (LINK), and 4 (DONE). Step 1 is currently active. Below the heading, there is a text input field labeled 'Enter your bank's name' with a magnifying glass icon. Below the input field, it says 'Examples: Bank of America, Citibank, American Express.' To the right of the input field, there is a section titled 'Or choose from these popular banks' with a list of banks: Bank of America - New, Chase Bank All - New, Fidelity Bank WC, U.S. Bank - PFM Direct Connect, Wells Fargo, Capital One Card Services, Citi Cards, and American Express QBDT.

10. On the enrollment screen, click Continue.



The screenshot shows the 'Bank Feed Setup' window with the title bar 'Bank Feed Setup'. The main heading is 'Enroll in Direct Connect'. A progress bar at the top right shows four steps: 1 (FIND), 2 (CONNECT), 3 (LINK), and 4 (DONE). Step 2 is currently active. Below the heading, there is a text input field labeled 'Enter your bank's name' with a magnifying glass icon. Below the input field, it says 'Examples: Bank of America, Citibank, American Express.' To the right of the input field, there is a section titled 'Or choose from these popular banks' with a list of banks: Bank of America - New, Chase Bank All - New, Fidelity Bank WC, U.S. Bank - PFM Direct Connect, Wells Fargo, Capital One Card Services, Citi Cards, and American Express QBDT.

11. Enter your Mountain America online banking username in the Account Number field. Then enter your online banking password.

Bank Feed Setup

Step 2: Connect Mountain America CU - Direct to QuickBooks

Fees will apply.

Account Number For your account

Online banking username

Password For your account

Online banking password

Service provided by <https://www.macu.com>
1-800-748-4302

Use your Mountain America CU - Direct user ID and password to sign in here. Click here to activate

Back Connect

How does QuickBooks protect my financial information?

12. Select the checking or savings accounts you want to link to the business. Then from the dropdown menu, select create new account.

Bank Feed Setup

Step 3: Link your accounts

YOUR BANK ACCOUNTS

QUICKBOOKS ACCOUNTS

PRIMARY SAVINGS-0001 (0001)

Select existing or create new

HOUSE-0002 (0002)

Select existing or create new

KIDS-0003 (0003)

Select existing or create new

CASEY-0004 (0004)

Select existing or create new

SECONDARY SAVINGS-0005 (0005)

Select existing or create new

Service provided by <https://www.macu.com>
1-800-748-4302

Back Connect

13. Fill out the form for each account.

Add New Account

Account Type

Bank

Account Name

Select from Examples

☐ Subaccount of

OPTIONAL

Description

Bank Acct. No.

Routing Number

Tax-Line Mapping

<Unassigned>

How do I choose the right tax line?

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

Learn more

Save & Close

Cancel

14. Once you have linked all your accounts, click Connect.

15. On the success screen, click close.

Bank Feed Setup

Success!

FIND

CONNECT

LINK

4

DONE

Your Mountain America CU - Direct accounts have been added to QuickBooks

YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS ?	STATUS
PRIMARY SAVINGS-0001 (0001)	Prod checking	Added

Service provided by
<https://www.macu.com>
1-800-748-4302

WHAT'S NEXT?

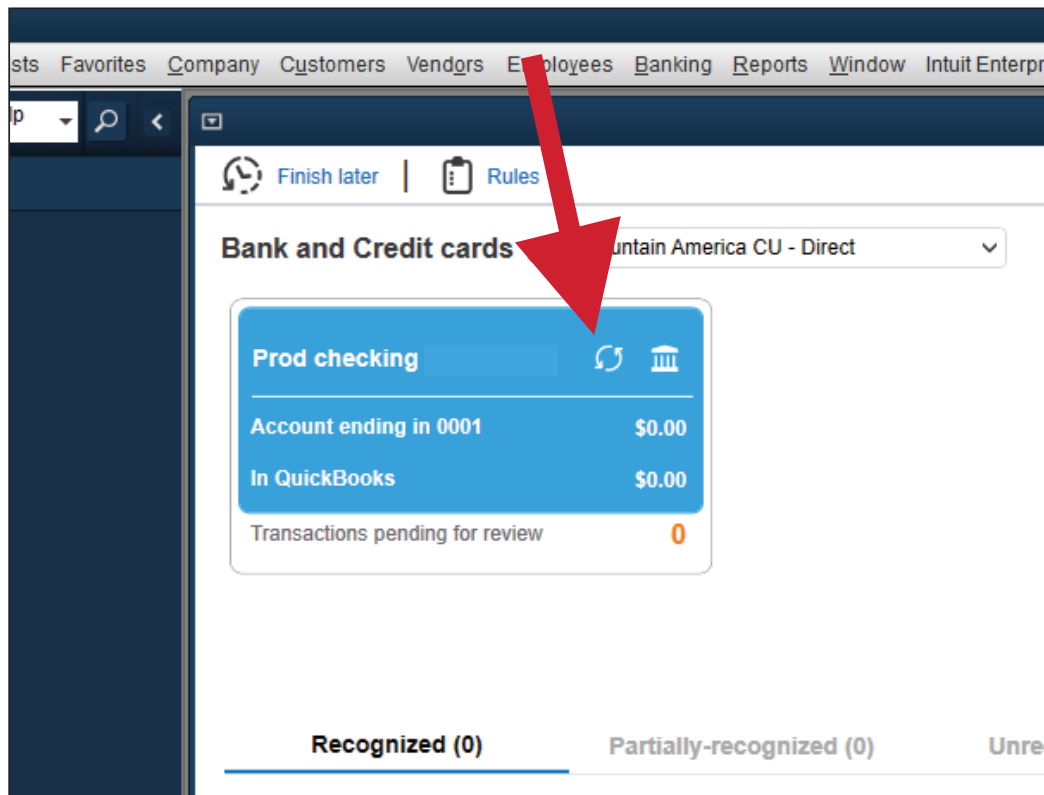
Add accounts from another bank

Download your transactions from Bank Feeds

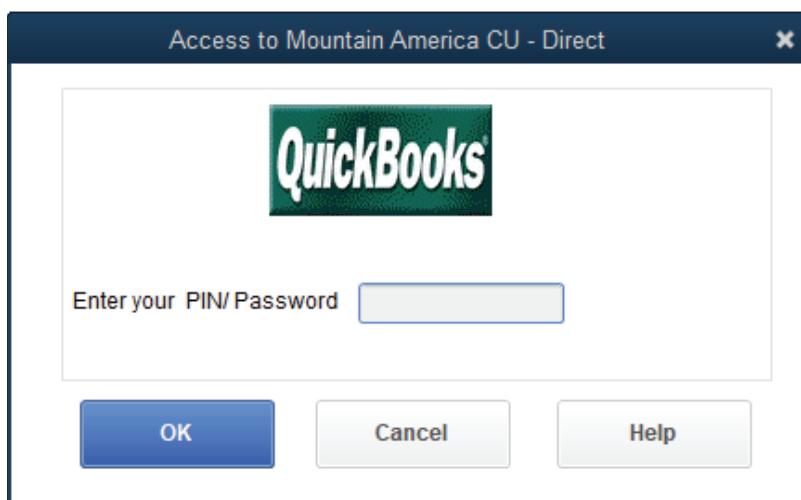
Close



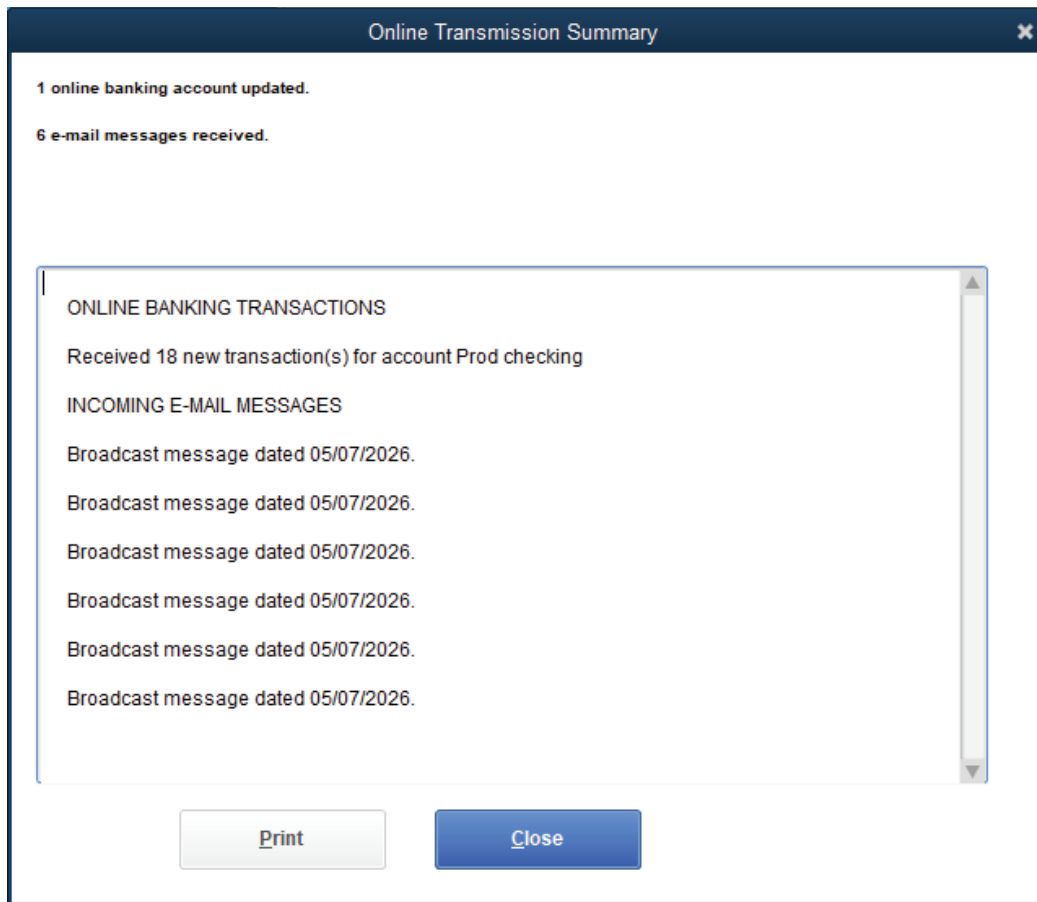
- 16.** You should be back on the dashboard.
- 17.** Click on Bank Feeds from the left menu again.
- 18.** Click on the refresh icon within the account box (upper-right corner).



- 19.** Click Ok.
- 20.** Log in to your Intuit account again. If this page doesn't load, shut down QuickBooks and reopen it.
- 21.** On the Enter your PIN/Password screen, enter your Mountain America online banking password.



22. A success screen will appear, saying accounts have been updated. Click Close.



23. You should now have access to your Mountain America balances and transactions within QuickBooks Desktop.

If you have any questions during the account linking process, please contact the business operations team at 801-325-6504, option 4.