

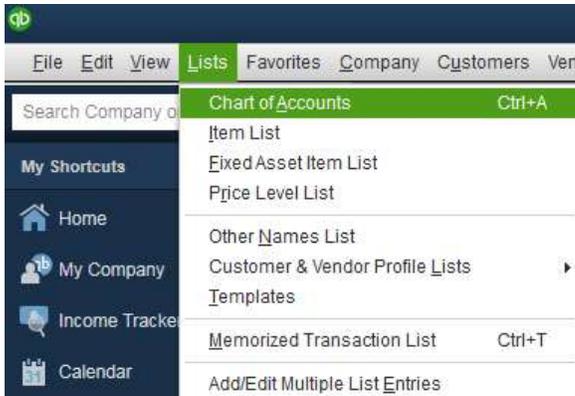
Setting Up Direct Connect within QuickBooks

Note: You must disconnect your ANB/UCBI accounts prior to setting up Direct Connect. Skip this step if the accounts are disconnected.

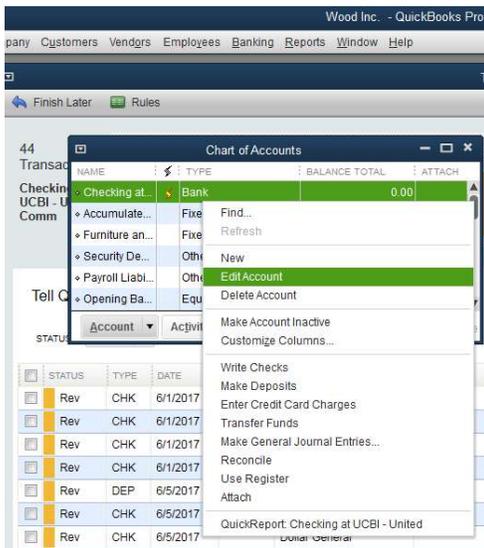
1. Click **Lists** from the menu along the top.



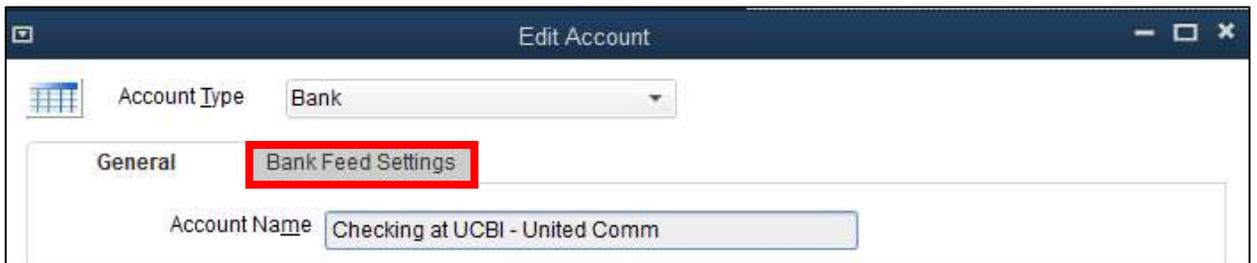
2. Click **Chart of Accounts**.



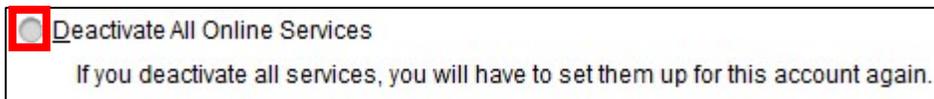
3. Right click on the bank account that is having the problem and click Edit Account.



4. Click on Bank Feed Settings tab.

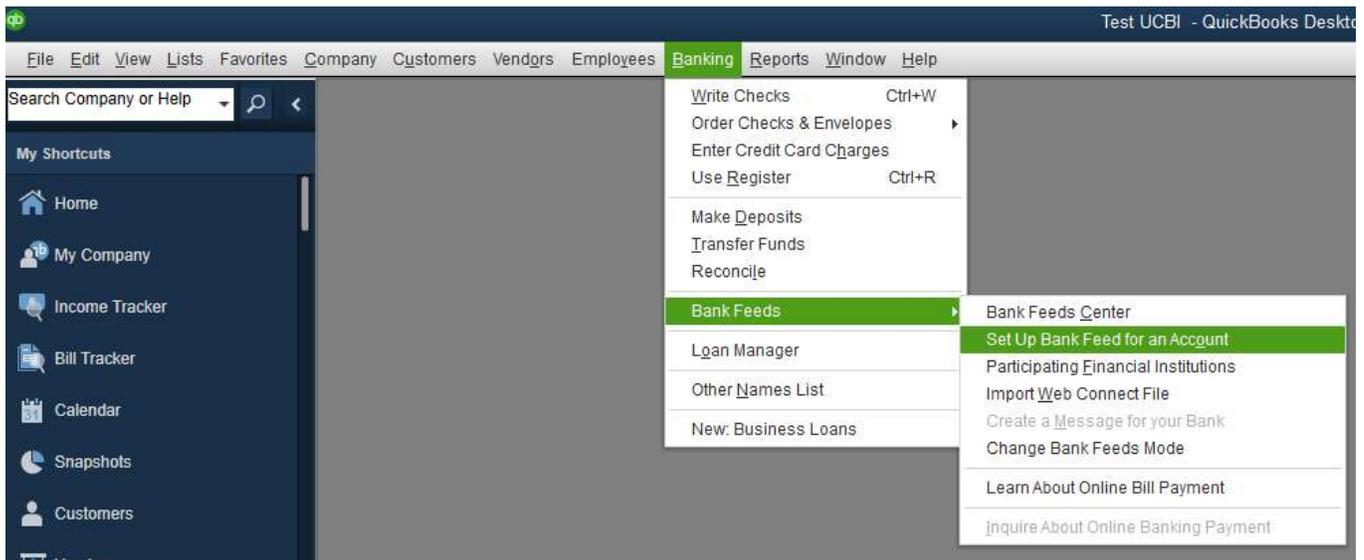


5. Check the box that says **Deactivate All Online Services**. Click OK.



**Complete the above steps for each United Account.

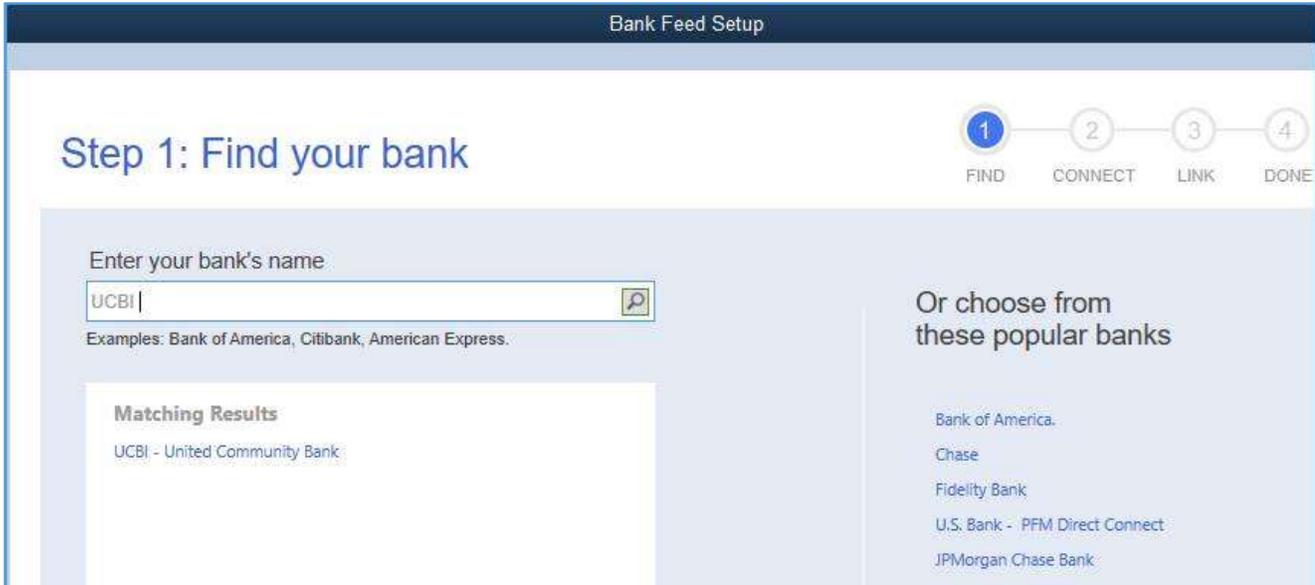
6. Click on the **Banking** tab at the top, then click on **Bank Feeds**. Click **Set up Bank Feed for an Account**.



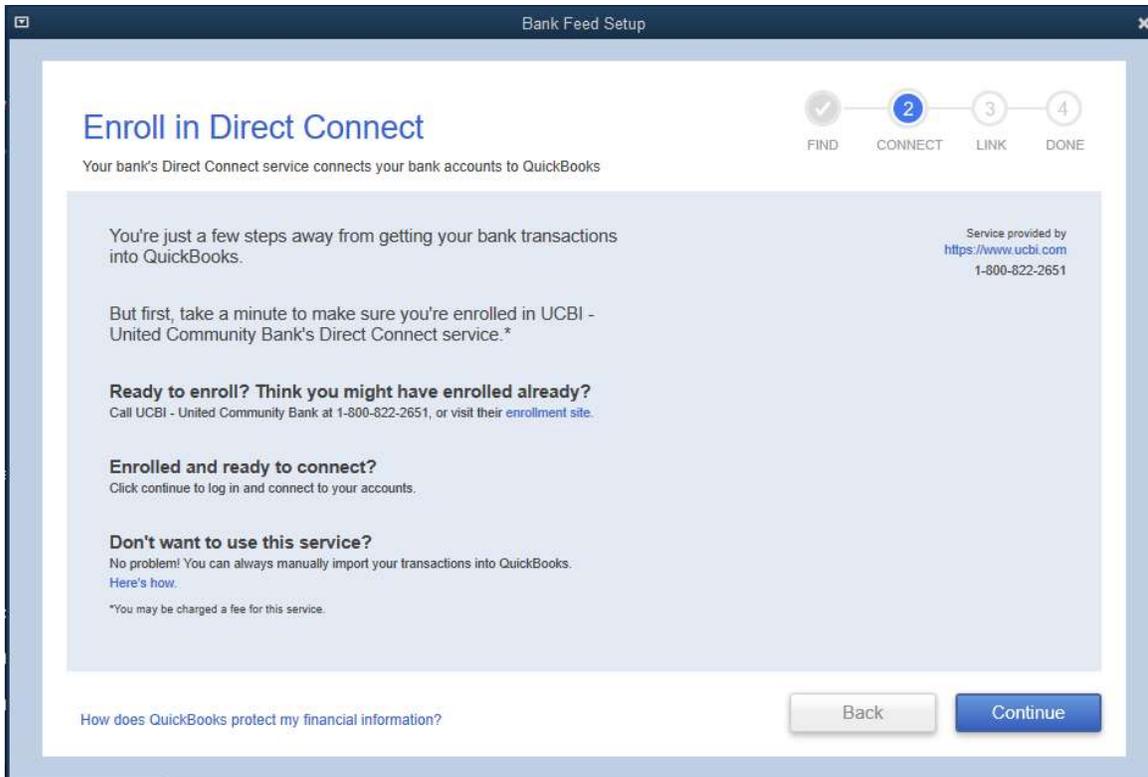
7. Click Yes.



8. Enter UCBI in the search field and click **UCBI – United Community Bank**



9. Click **Continue** at the bottom



10. Enter your UCBI online banking **User ID** and **Password** in the fields below. Click **Continue**

Bank Feed Setup

Step 2: Connect UCBI - United Community Bank to QuickBooks

No fees apply.

Want more options? Use [Advanced Setup](#).

Service provided by
<https://www.ucbi.com>
1-800-822-2651

You need special credentials from UCBI - United Community Bank to sign in here. [Click here to enroll](#)

User ID For your account

Password For your account

How does QuickBooks protect my financial information?

Back Connect

11. Step 3: Link the accounts back to the corresponding accounts in QuickBooks that are displayed.
IMPORTANT: Ensure the accounts are **linked** to the existing QuickBooks accounts that are already setup. Unless, they are brand new accounts in QuickBooks.
Click **Connect**.

Bank Feed Setup

Step 3: Link your accounts

YOUR BANK ACCOUNTS QUICKBOOKS ACCOUNTS

United Checking-	Select existing or create new
United Signature Checking-	Select existing or create new
Transaction Student Savings-	Select existing or create new
United Checking-	Select existing or create new

Service provided by
<https://www.ucbi.com>
1-800-822-2651

Back Connect

Final: Successfully linked

Bank Feed Setup

Success!

FIND CONNECT LINK DONE

Your UCBI - United Community Bank accounts have been added to QuickBooks

YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS	STATUS
United Checking-	UCBI Payroll Acc	Added

Service provided by
<https://www.ucbi.com>
1-800-822-2651

WHAT'S NEXT?
Add accounts from another bank
Download your transactions from Bank Feeds

Close