



Set up your QuickBooks account for Bank Feeds

Bank Feeds is the online banking feature in QuickBooks that lets you connect to Pacific West Bank so you can download transactions and use other online services. Through Bank Feeds, you can process bank transactions efficiently giving you extra time for your other business needs.

1. From the QuickBooks **Banking** menu, select **Bank Feeds > Set Up Bank Feeds for an Account**.
Note: You can confirm that Pacific West Bank supports Online Banking in QuickBooks. Go to **Banking > Bank Feeds > Participating Financial Institutions**.
2. In the Enter your Bank's name field, enter *Pacific West Bank*. Note that as you type, QuickBooks displays possible matches. Choose ***Pacific West Bank – Business***.
3. **Web Connect:** Pacific West Bank offers Web Connect today. You will be redirected to a window providing steps to download transactions through Web Connect.

Note that downloading transactions from the bank's website and importing them into QuickBooks Desktop for the first time automatically sets up an account for online banking. Depending on the version of QuickBooks you're using, you may be presented with options for Direct Connect, Web Connect or both.

4. On the Link your Accounts screen, choose which bank account/s to add to QuickBooks.
 - If you have multiple accounts (Savings, Checking, etc.) available to connect to QuickBooks but only need one (Checking), then you can set up online banking just for it.
 - If the account is not yet in QuickBooks, select the **Select existing** or **Create new** drop-down, then choose **Create New Account**.

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