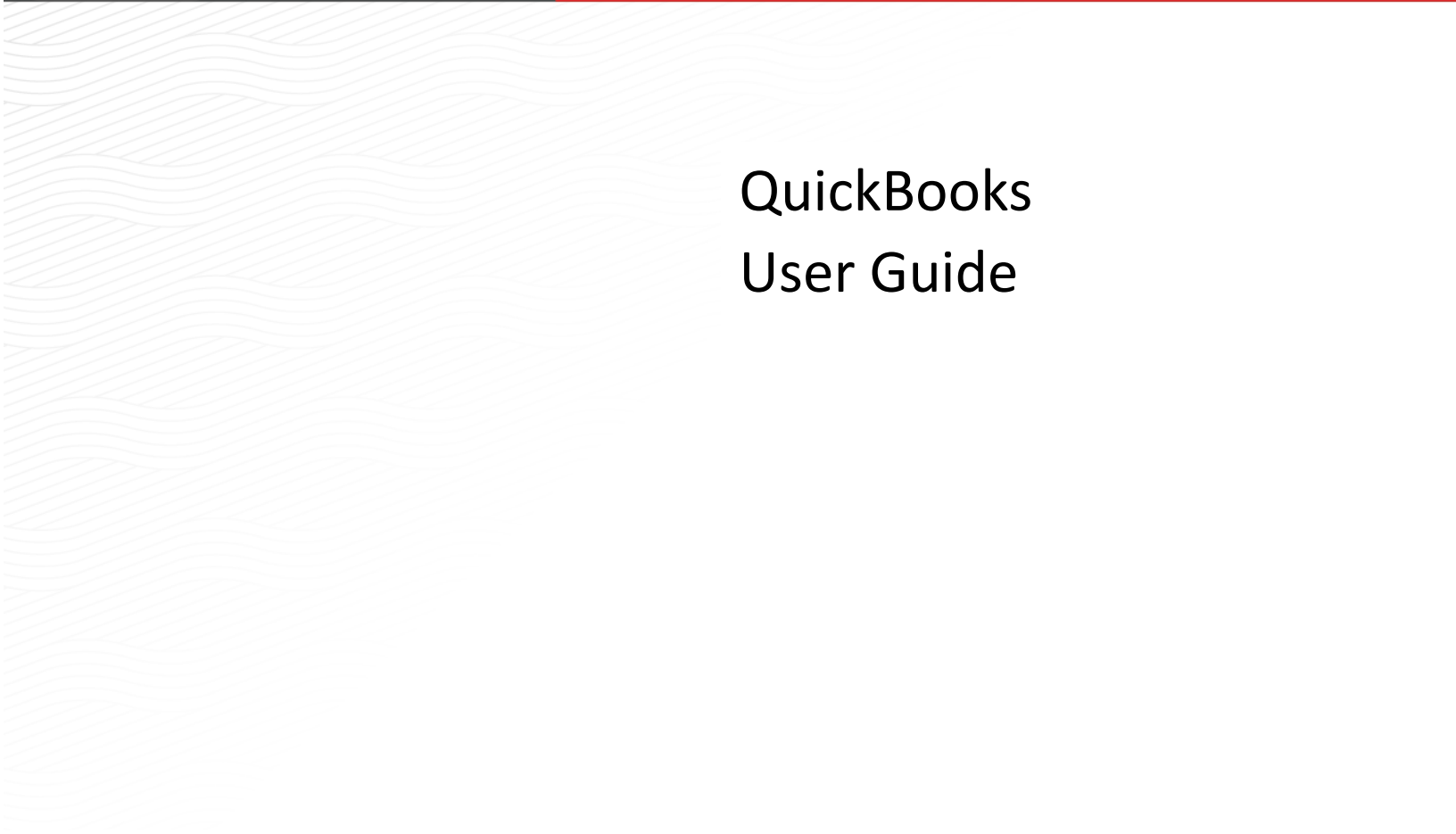




SYNOVUS[®]

G A T E W A Y



QuickBooks
User Guide

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Purpose

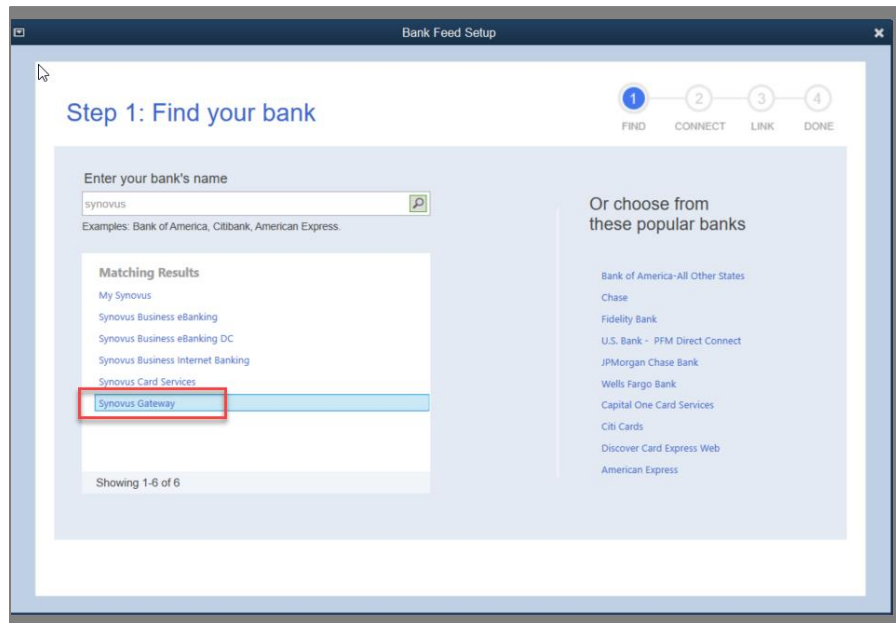
Synovus Gateway, combined with QuickBooks® accounting software, enables you to seamlessly integrate your Synovus account information, transfer funds between Synovus accounts, and quickly and easily download transactions.

Audience

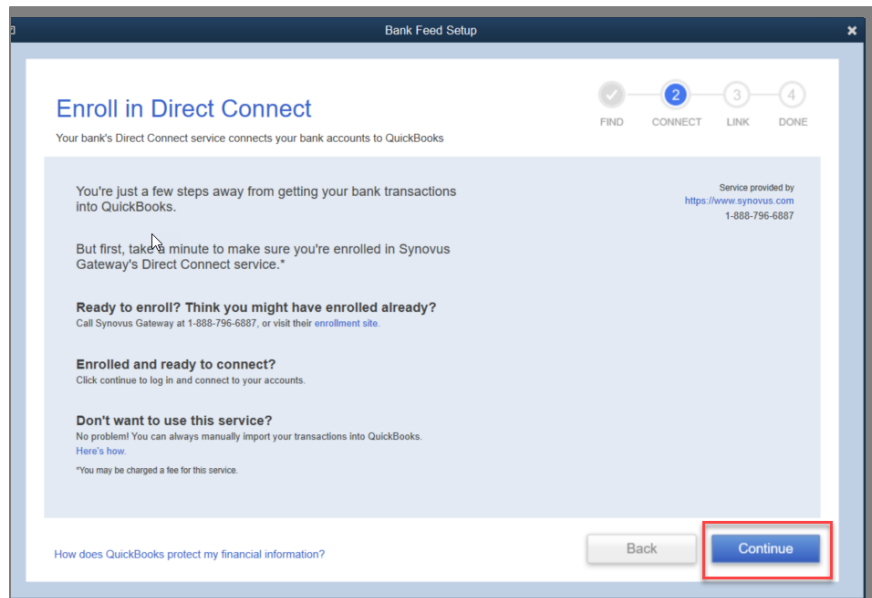
This document is intended for all Synovus Gateway users with business and commercial accounts.

Adding Accounts

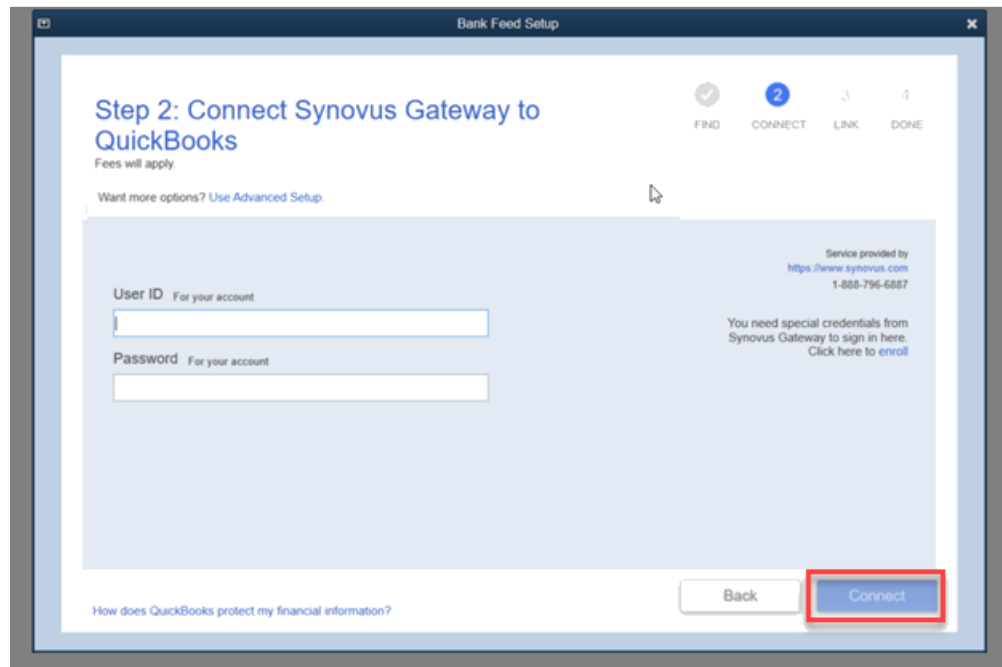
1. Enter Synovus in the bank name field and select Synovus Gateway.



2. Select 'Continue'.



3. Enter your Synovus Gateway credentials.



4. Select the account you want to integrate into your QuickBooks® desktop software. QuickBooks® will connect securely to our server to download bank data for the selected account.
5. Click **Finish** after the download completes. You have successfully integrated Synovus Gateway online banking with your QuickBooks® desktop software.

If integrating your accounts with QuickBooks® online software, follow the below steps to add your account(s):

1. Go to the Banking menu or Transactions menu.
2. Select the Banking tab.
3. Select Connect Account on the landing page if this is your first time connecting. Or select Add account or Link account if you've already created one.
4. Search for Synovus Gateway.
5. Select Continue. Enter your Synovus Gateway login ID and password.
6. Follow the onscreen steps to connect.
7. Select accounts you want to connect.

8. For each account you connect, select the matching account type from the dropdowns. These are accounts on your chart of accounts in QuickBooks.
9. Select Connect.

Account Transfers

With Synovus Gateway Direct Connect, account transfers are executed in real time. Account to Account transfers within QuickBooks® can only be conducted between internal Synovus accounts under the same Customer record and Tax ID.

1. Under the **Banking** main menu, select **Online Banking**, then select **Transfer Funds**. The **Transfer Funds** page appears.
2. Select the **Transfer Funds From** account from the drop-down menu.
3. Select the **Transfer Funds To** account from the drop-down menu.
4. Enter the **Transfer Amount**. Click the **Save & Close** button or click **Save & New** to enter additional account transfers.

The saved account transfer will appear under **Items to Send** in the **Online Banking Center**.



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