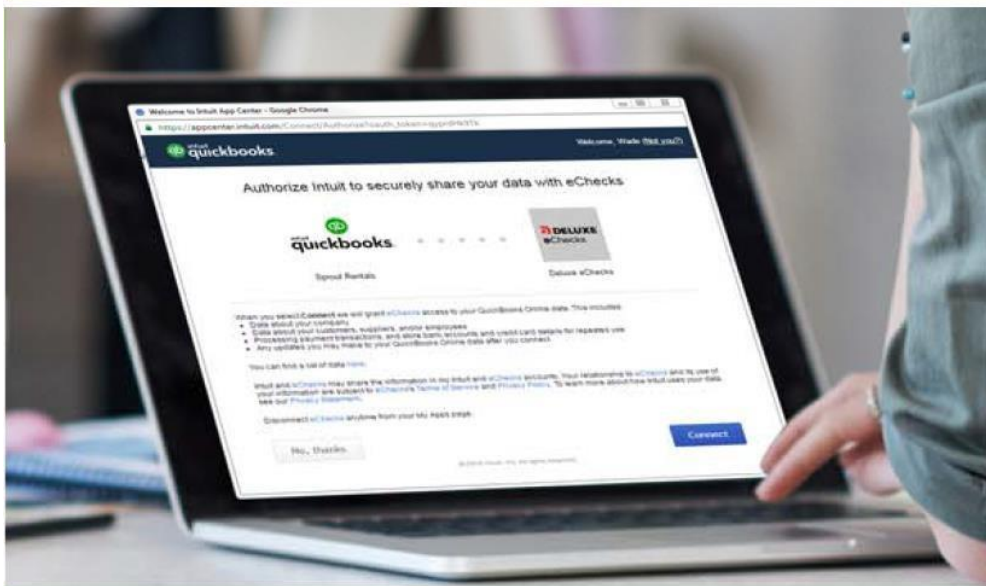# eChecks QuickBooks Online Integration Set Up Guide

Seamless integration with QuickBooks® Online makes your payment process even easier.

eChecks and QuickBooks Online.
Made for each other.

Updated: October 1, 2018

Contents

Overview

Linking your QuickBooks Online and eChecks accounts is fast and easy. This guide will walk you through that process. If at any point you need help, we're here! Contact customer support at 877-333-6964 and ask to speak with one of our eCheck integration specialists.

Once set up is complete, all QuickBooks Online users with access to your company accounts can create/send eChecks in addition to printed checks.

Prerequisites
- Existing QuickBooks Online account (versions including QuickBooks Online Advanced, QuickBooks Online Essentials, QuickBooks Online Plus, and QuickBooks Online Simple Start)
- Existing eChecks account (with at least one confirmed/active checking account)

Don't miss these! Best Practices & FAQs

Implementation Best Practices

Our eCheck integration specialists have helped hundreds of customers set up and use eChecks QuickBooks Online add-on. We've gathered information on these customers' unique business situations and want to share how to best meet those needs. This is best practices document available to you on the eChecks Help Center in the QuickBooks Online section: https://echecks.zendesk.com/.

Frequently Asked Questions about using eChecks with QuickBooks Online

There's no such thing as a dumb question (and if you want to know, it is likely other customers have already asked. We keep a robust set of FAQs not only for using eChecks but specifically about the eChecks integration with QuickBooks Online. Check the QuickBooks Online section of the eChecks Help Center at: https://echecks.zendesk.com/hc/en-us/categories/115001475128.

How to Use this Guide: Same Information – Presented Different Ways

This guide presents the same information in two ways: a condensed summary of only the step descriptions steps and a detailed walkthough of each step. Regardless which you use, make sure you also browse the Best Practices document.

For Techies – 1 Page Set Up Summary (aka the "Happy Path")

This section of the guide provides a condensed summary of the key set up steps. We have designed the set up to be quick, easy and intuitive … so for many users, this is all you'll need.

For those who want Details – Step-by-Step Walkthrough

If you are less sure and want detailed step-by-step instructions with screen shots and additional explanation, this is the section for you. And, as a reminder, if you prefer live, human assistance, we offer that too! Just call customer support at 877-333-6964 and ask to speak with one of our eCheck integration specialists.

For Techies – 1 Page Set Up Summary (aka the "Happy Path")

This version of our set up instructions provides a condensed summary of the key steps you'll need to connect your QuickBooks and eCheck accounts. We have designed the set up to be quick, easy and intuitive … so for many users, this is all you'll need.

Once set up is complete, all QuickBooks Online users with access to your company accounts can create/send eChecks in addition to printed checks.

Prerequisites

- Existing QuickBooks online account (versions including QuickBooks Online Advanced, QuickBooks Online Essentials, QuickBooks Online Plus, and QuickBooks Online Simple Start)
- Existing eChecks account (with at least one confirmed/active checking account)
- Note: the person using the add-on to connect QuickBooks and eChecks accounts, must be a Master Administrator of the QuickBooks Online account as well as the Owner of the eChecks checking account.

Linking QuickBooks Online and eChecks

1. Go to https://qbo.echecks.com; log in with your eChecks email and password
2. Click on 'Connect to QuickBooks' (in green)
3. Enter QuickBooks Online login credentials; wait for an Activation code to be sent via the multi-factor authentication method you selected; enter the Confirmation code
4. Authorize the app to link your QuickBooks and eChecks accounts
5. Select the QuickBooks account you wish to set up with eChecks; click Connect; click on box with pencil to edit; then, choose the eCheck account and eCheck Creator from the list of drop down options; hit Save button, this will trigger an email from app@echecks.com verifying that you have requested access to your eCheck account; follow the link
6. Follow the link from the email or go to echecks.com/login to confirm the eChecks Creator within QuickBooks Online
7. One logged in to your eChecks account, navigate to the user profile; when there, the manage application screen will automatically appear; click on approve to grant access.

Once these steps are completed your QuickBooks and eChecks accounts are connected. Please visit the eChecks Help Center if you have any other questions: https://echecks.zendesk.com/hc/en-us/categories/115001475128-QuickBooks-Online or contact customer support at **877-333-6964** and ask to speak with one of our eCheck integration specialists.

For those who want Details – Step-by-Step Instructions

This version of our Set Up instructions provides a detailed walkthrough. Our set up is designed to be quick, easy and intuitive … but want to make sure you are comfortable, so we've written everything out and included screen shots of what is happening at each step. If, however, you prefer live, human assistance, we offer that too! Just call customer support at 877-333-6964 and ask to speak with one of our eCheck integration specialists.

Once set up is complete, all QuickBooks Online users with access to your company accounts can create/send eChecks in addition to printed checks.

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• Existing QuickBooks online account (versions including QuickBooks Online Advanced, QuickBooks Online Essentials, QuickBooks Online Plus, and QuickBooks Online Simple Start)
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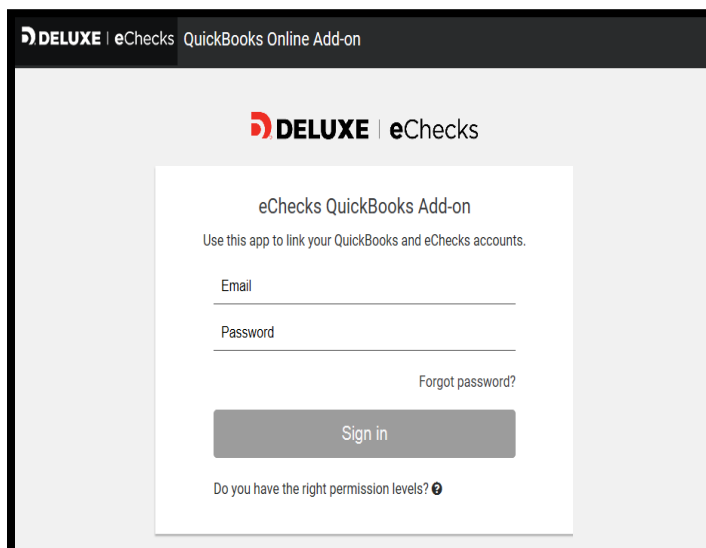### Set Up steps handled by the eChecks QuickBooks Online app

There are eight steps you need to perform using the eChecks QuickBooks Online Add-on app to link your QuickBooks bank accounts to your eCheck checking accounts.

> **NOTE:** The person using the app to connect QuickBooks and eCheck accounts needs proper permission levels. They must be both an Administrator on the QuickBooks Online company file(s) as well as the owner of the eChecks checking account(s) being linked.

### Step 1: Go to the app Landing page & enter your eChecks account credentials

To begin, go to https://qbo.echecks.com to launch the landing page of the eChecks QuickBooks Online app. This link is also available from the Intuit QuickBooks app store.

Enter your eChecks account login credentials and click Sign in.

After clicking Sign in, you'll be brought to a page where you will click on the Connect to QuickBooks.

Step 2: Connect to your QuickBooks Online account

Click on the Connect to QuickBooks button to initiate a connection.
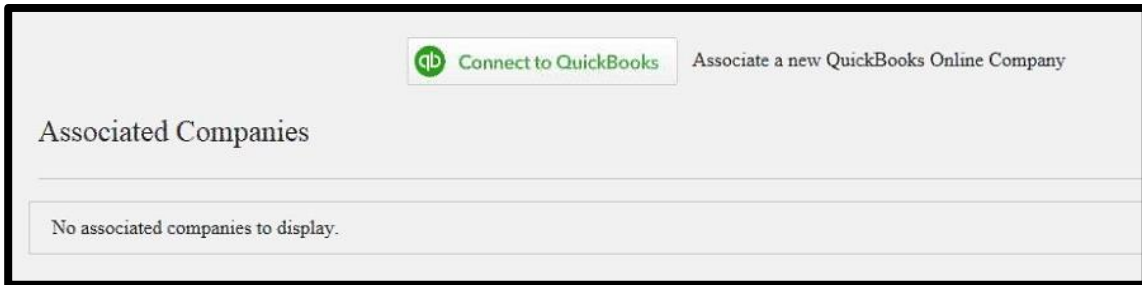
Once this is done, you will be prompted to enter in your QuickBooks Online User ID and Password.

> **NOTE:** If you are already logged into QuickBooks in a different web browser tab, you will skip this step and be taken to directly to Step 4 where you enter your confirmation code.

Step 3: Confirm your QuickBooks Online account information by entering your QuickBooks login credentials

Enter your QuickBooks Online User ID and Password. After you sign in, you will be prompted to choose a method to receive an activation code to verify your QuickBooks account. The activation confirmation code delivery options are 1) email, 2) text message, or 3) phone call.
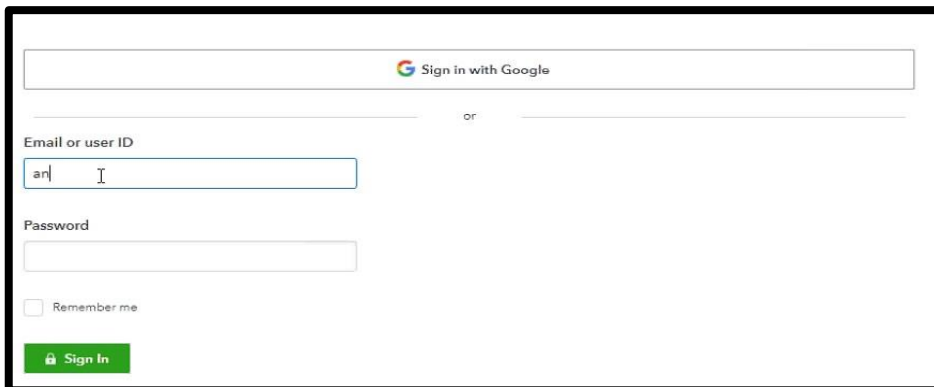

> Once you select your preferred method, an account activation code will be sent to you. You will need this code on the next screen to confirm your identify.

Step 4: Authorize the app to link your QuickBooks and eCheck accounts

After entering the confirmation code, you will be brought to the eChecks QuickBooks Online app Authorization Page. This is the point at which you are linking your QuickBooks and eChecks accounts. Once you have read the information explaining what happens when you connect your accounts, click Connect.

> **NOTE:** It is important to read and understand the information about what information is shared between QuickBooks and eChecks.
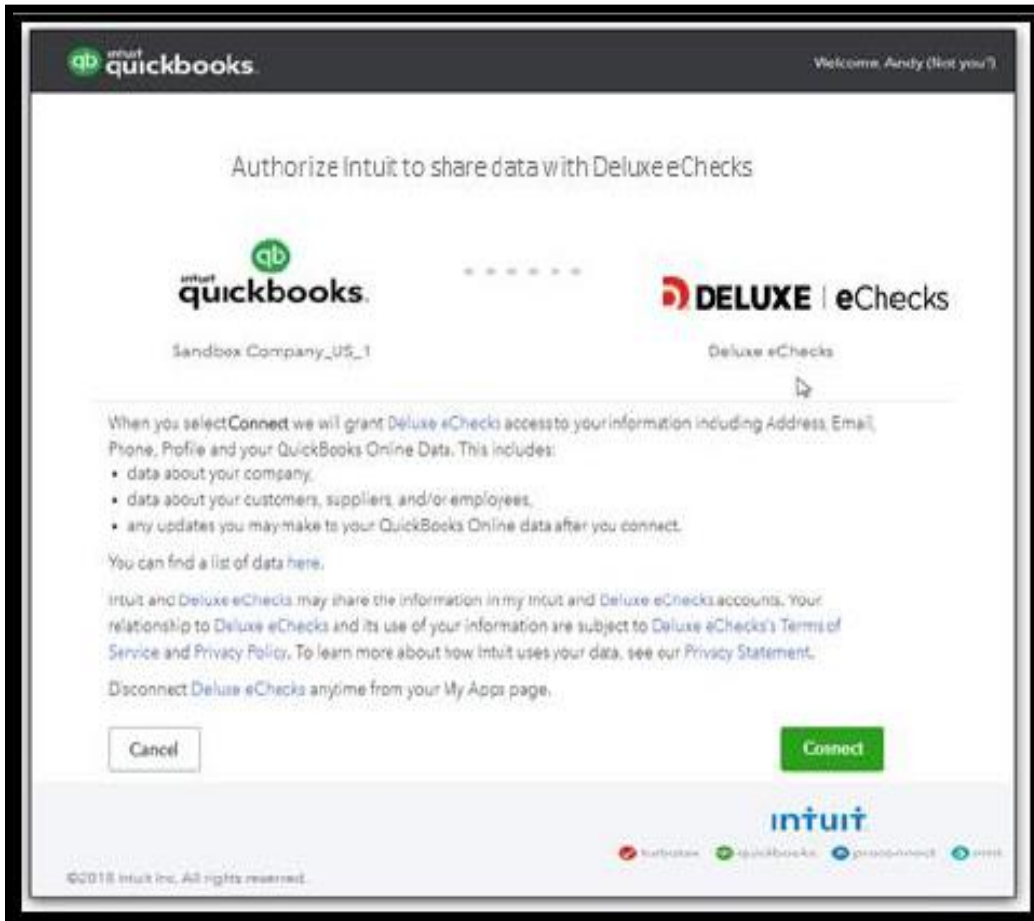
Step 5: Select the QuickBooks account you wish to set up with eChecks

Once eChecks and QuickBooks connect, the app will list your QuickBooks bank accounts under Associated Companies. Click on box with pencil to make your selections from the list of eligible options shown in the drop-down options:

- eChecks account - select the corresponding QuickBooks Account that is set up with eChecks
- eChecks creator – select the user who will be the designated eChecks creator for all eChecks initiated from QuickBooks Online; this person will appear as the "Created By" under the account activity within the eChecks app.

Hit the Save button. This will trigger an email from app@echecks.com verifying that you have requested access to your eCheck account.

NOTE: Hitting the ? icon next to the header labels will give you additional help to assist in more making your selection.
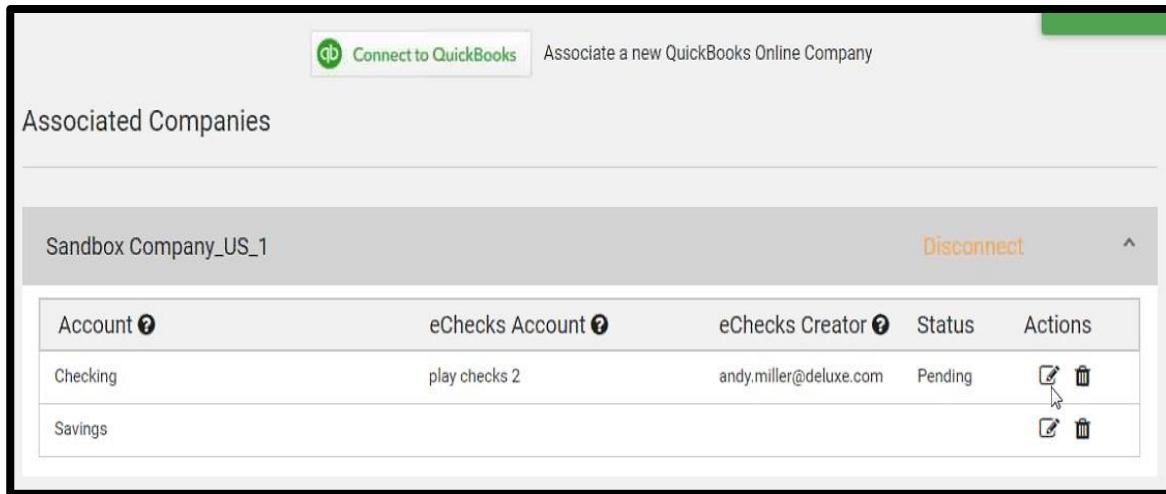
Once you've made your selections, click on the Save button underneath the actions header.

Step 6: Confirm approval for the Check Creator within QuickBooks to process eChecks

Once you have selected the eChecks Creator, that user of the eChecks Checking account will receive an email requesting approval for this user to access the Deluxe eChecks checking account. To finalize grant approval, the eChecks Creator needs to click on the blue link of the email they receive and follow the steps to confirm the eChecks Creator.
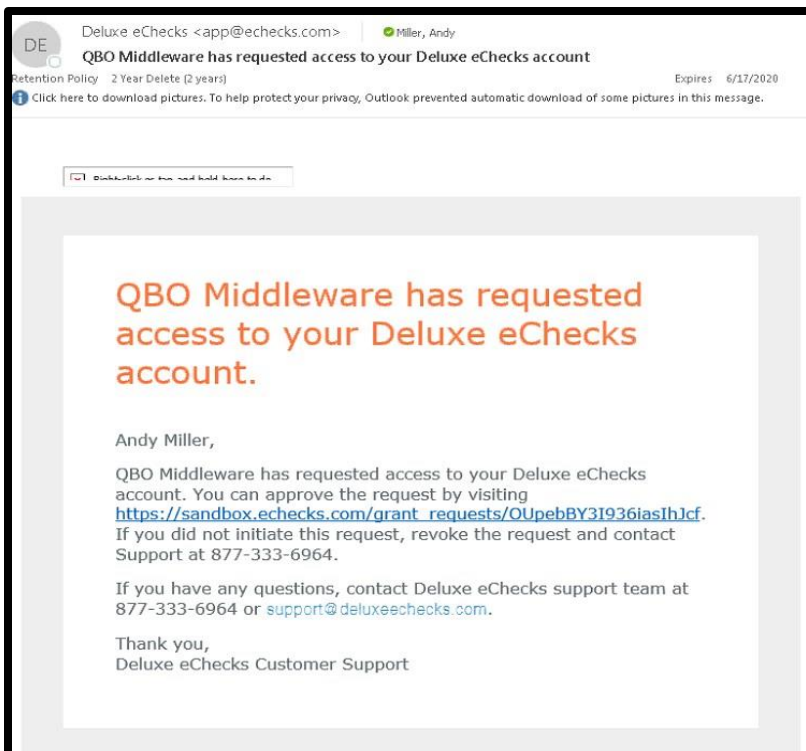
Set Up steps that happen within your eChecks accounts

Step 7: When logged in to eChecks, navigate to User Profile to manage application access

Following the link from the email in you received, the system will automatically display the Manage Application Access screen to confirm the eChecks creator to connect eChecks and your QuickBooks Online accounts. Click Approve.

If you do not have the link handy, log in at echecks.com/login and navigate to the User Profile screen (upper right of the top navigation bar). Once there, click on the Manage Applications link and click Approve.
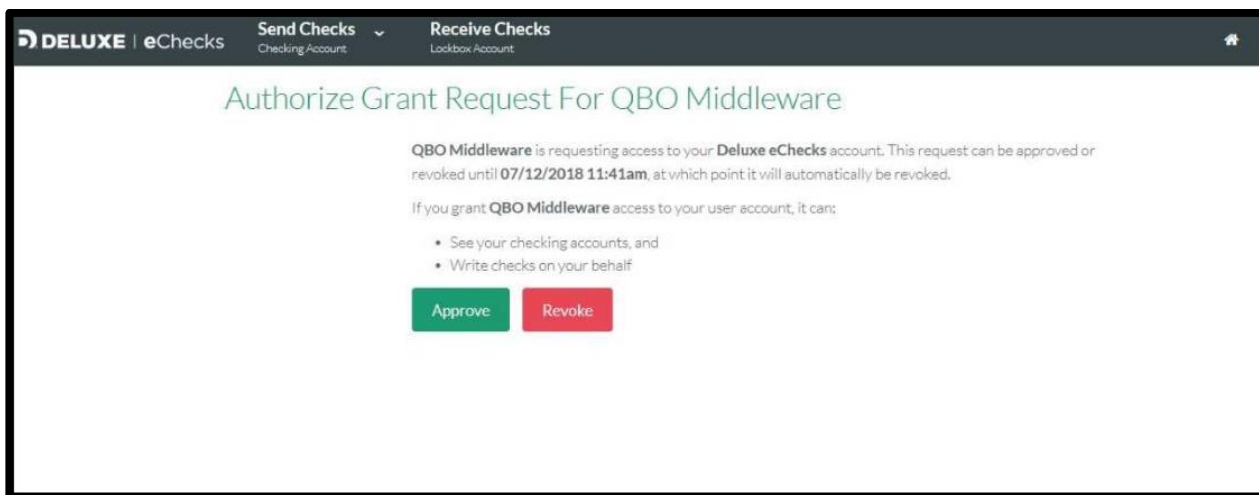
As soon as you see the approval message, QuickBooks is successfully set-up with eChecks and you are now ready to write eChecks through QuickBooks Online.