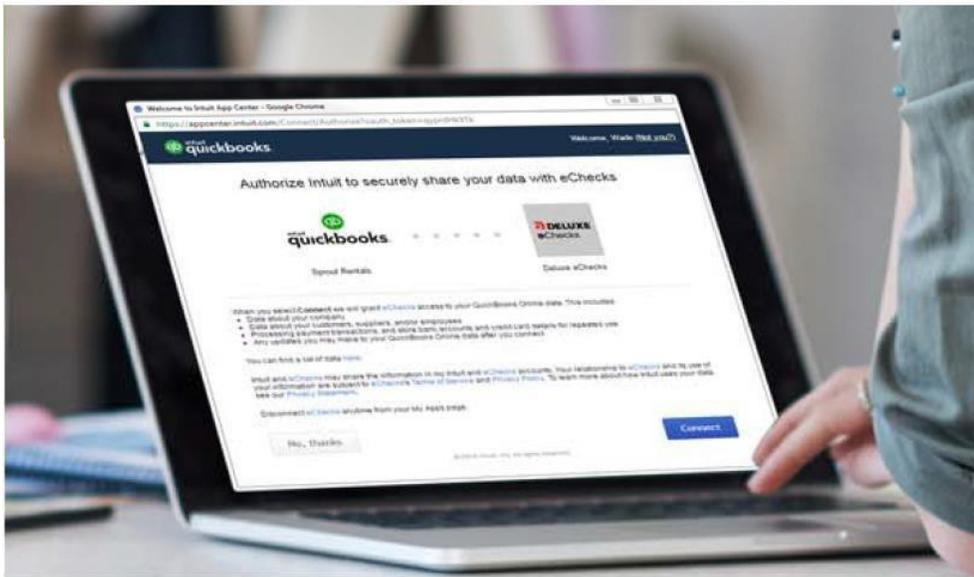


# Deluxe Payment Exchange / QuickBooks Online Integration Set Up Guide

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



eChecks and QuickBooks Online. Made for each other.

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## Overview

Linking your QuickBooks Online and Deluxe Payment Exchange 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 Deluxe Payment Exchange 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
- Existing Deluxe Payment Exchange account (with at least one confirmed/active checking account)

## Don't miss these! Best Practices & FAQs

### Implementation Best Practices

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

Frequently Asked Questions about using the Deluxe Payment Exchange 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 the Deluxe Payment Exchange but specifically about the Deluxe Payment Exchange integration with QuickBooks Online. Check the QuickBooks Online section of the Deluxe Payment Exchange 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 and a detailed walkthrough 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 Deluxe Payment Exchange 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 Deluxe Payment Exchange 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
- Existing Deluxe Payment Exchange account (with at least one confirmed/active checking account)
- Note: the person using the add-on to connect QuickBooks and the Deluxe Payment Exchange accounts, must be a Master Administrator of the QuickBooks Online account as well as the Owner of the Deluxe Payment Exchange checking account.

### Linking QuickBooks Online and the Deluxe Payment Exchange

Note: If you are using QuickBooks Online with eChecksPro or SafeGuard, then wherever you see a link for qbo.echecks.com in this document, use one of the following links instead:

eChecksPro, use <https://qbo.echecks.com/echeckspro>

SafeGuard, use <https://qbo.echecks.com/safeguard>

1. Go to <https://qbo.echecks.com>; log in with your Deluxe Payment Exchange 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 Deluxe Payment Exchange accounts
5. Select the QuickBooks account you wish to set up with the Deluxe Payment Exchange; click Connect; click on box with pencil to edit; then, choose the Deluxe Payment Exchange account and eCheck Creator from the list of drop down options; hit Save button, this will trigger an email from [app@echecks.com](mailto:app@echecks.com) verifying that you have requested access to your Deluxe Payment Exchange account
6. Follow the link from the email or go to <https://echecks.com/login> to confirm the eChecks Creator within QuickBooks Online
7. Once logged in to your Deluxe Payment Exchange 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 Deluxe Payment Exchange accounts are connected. Please visit the Deluxe Payment Exchange 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 Deluxe Payment Exchange 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 Deluxe Payment Exchange 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
- Existing Deluxe Payment Exchange account (with at least one confirmed/active checking account)
- Note: the person using the add-on to connect QuickBooks and the Deluxe Payment Exchange accounts, must be a Master Administrator of the QuickBooks Online account as well as the Owner of the Deluxe Payment Exchange checking account.

### Set Up steps handled by the Deluxe Payment Exchange QuickBooks Online app

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

**NOTE:** The person using the app to connect QuickBooks and Deluxe Payment Exchange 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 Deluxe Payment Exchange checking account(s) being linked.

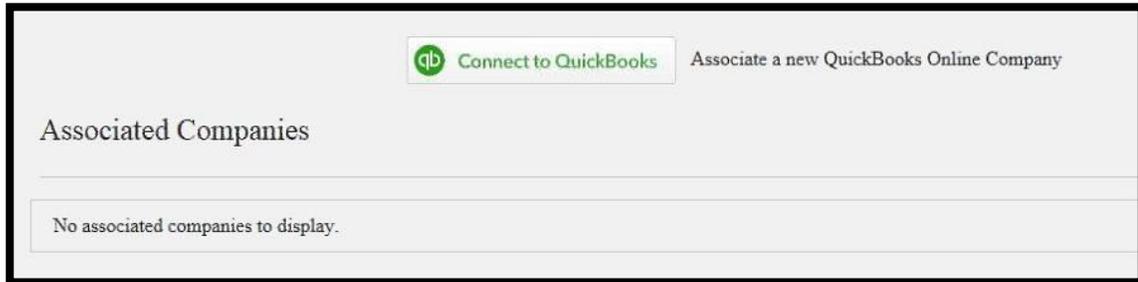
Step 1: Go to the app Landing page & enter your Deluxe Payment Exchange account credentials  
To begin, go to <https://qbo.echecks.com> to launch the landing page of the Deluxe Payment Exchange QuickBooks Online app. This link is also available from the Intuit QuickBooks app store.

Enter your Deluxe Payment Exchange account login credentials and click Log in.

After clicking Log 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.

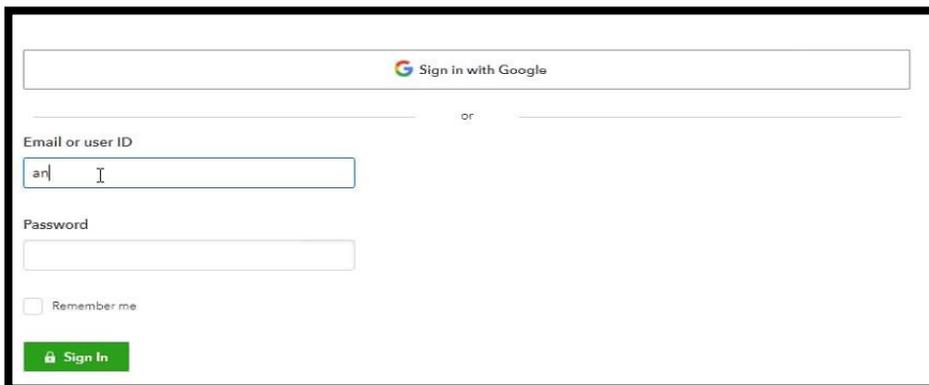


Once this is done, you will be prompted to enter in your QuickBooks Online User ID and Password.

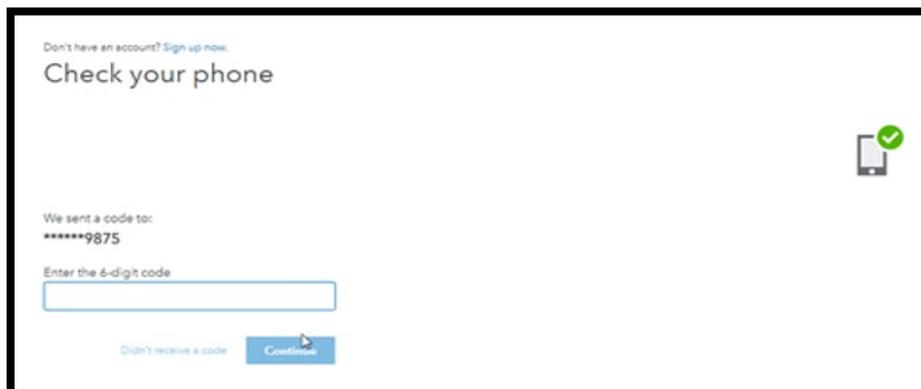
**NOTE:** If you are already logged into QuickBooks in a different web browser tab, you will skip this step and be taken to directly to Step 4 where you enter your confirmation code.

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.

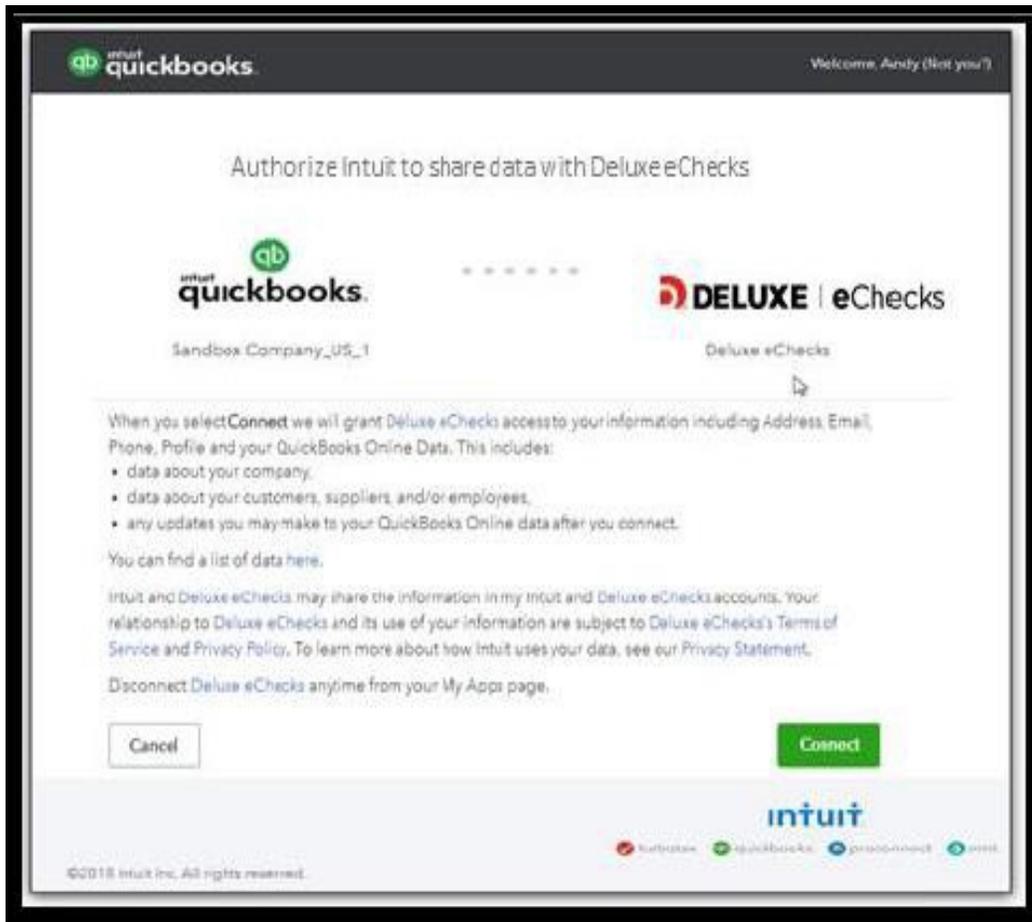


Once you select your preferred method, an account activation code will be sent to you. You will need this code on the next screen to confirm your identify.



Step 4: Authorize the app to link your QuickBooks and Deluxe Payment Exchange accounts  
After entering the confirmation code, you will be brought to the Deluxe Payment Exchange QuickBooks Online app Authorization Page. This is the point at which you are linking your QuickBooks and Deluxe Payment Exchange 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 the Deluxe Payment Exchange.

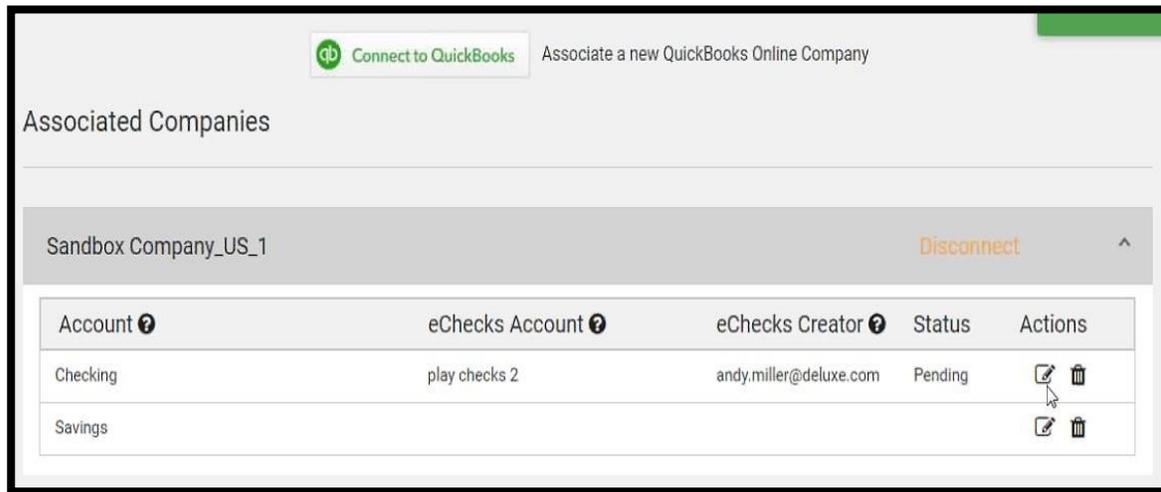


Step 5: Select the QuickBooks account you wish to set up with the Deluxe Payment Exchange  
Once the Deluxe Payment Exchange and QuickBooks connect, the app will list your QuickBooks bank accounts under Associated Companies. Click on box with pencil to make your selections from the list of eligible options shown in the drop-down options:

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

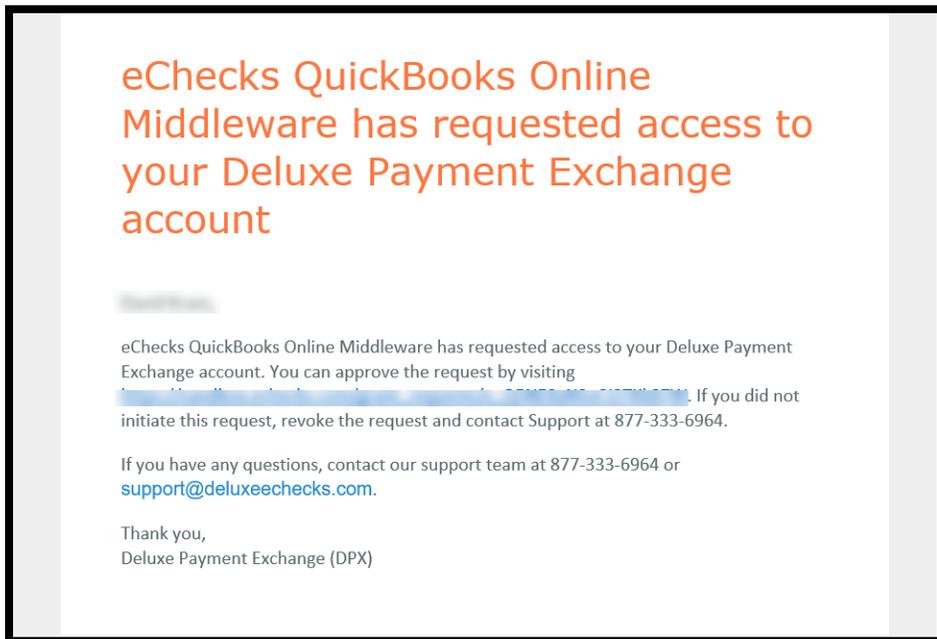
Hit the Save button. This will trigger an email from [app@echecks.com](mailto:app@echecks.com) verifying that you have requested access to your Deluxe Payment Exchange account.

**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 eCheck Creator within QuickBooks to process eChecks  
 Once you have selected the eChecks Creator, that user of the Deluxe Payment Exchange Checking account will receive an email requesting approval for this user to access the Deluxe Payment Exchange 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 Deluxe Payment Exchange accounts

Step 7: When logged in to the Deluxe Payment Exchange, 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 the Deluxe Payment Exchange and your QuickBooks Online accounts. Click Approve.

If you do not have the link handy, log in at [echecks.com/login](https://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.



### Manage Application Access

#### Grant Requests

These are the applications that want to access your accounts and write checks on your behalf.

Application	Expires	
<a href="#">eChecks QuickBooks Online Middleware</a>	04/23/2021 4:22 PM	<a href="#">Approve</a> <a href="#">Revoke</a>

This page is displayed if you clicked on the application link “eChecks QuickBooks Online Middleware”:



### Authorize Grant Request for eChecks QuickBooks Online Middleware

eChecks QuickBooks Online Middleware is requesting access to your Deluxe Payment Exchange account. This request can be approved or revoked until 04/23/2021 5:39pm, at which point it will automatically be revoked.

If you grant eChecks QuickBooks Online Middleware access to your user account, it can:

- See your checking accounts, and
- Write checks on your behalf



As soon as you see the approval message, QuickBooks is successfully set-up with the Deluxe Payment Exchange and you are now ready to write eChecks through QuickBooks Online.