

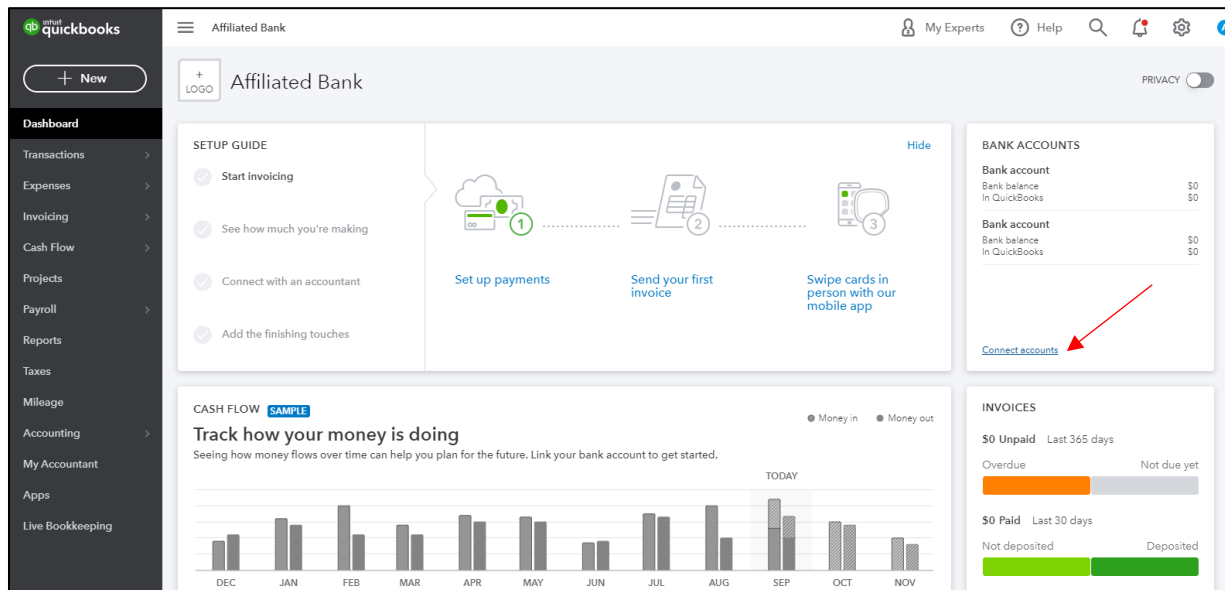
QuickBooks Online – Direct Connect/Express Web Connect

There are two ways to connect to Affiliated Bank using QuickBooks Online.

1. **Web Connect** is where you log in to **Business Online Banking**.
 - Select the data range and account you want to export and then pull the data into QuickBooks for reconciliation of transactions. For more information on this method see the **Web Connect for QuickBooks Online Quick Reference Guide**.
2. **Direct Connect/Express Web Connect** is where you log in directly from **QuickBooks into the Bank**. With **Direct Connect/Express Web Connect**, there are a couple things you need to know:
 - **Direct Connect/Express Web Connect** will automatically pull ALL available account activity into QuickBooks unless you select otherwise in the Which Accounts do you want to Connect screen.
 - Affiliated Bank does NOT support the bill pay function within Direct Connect, only the data transmission.

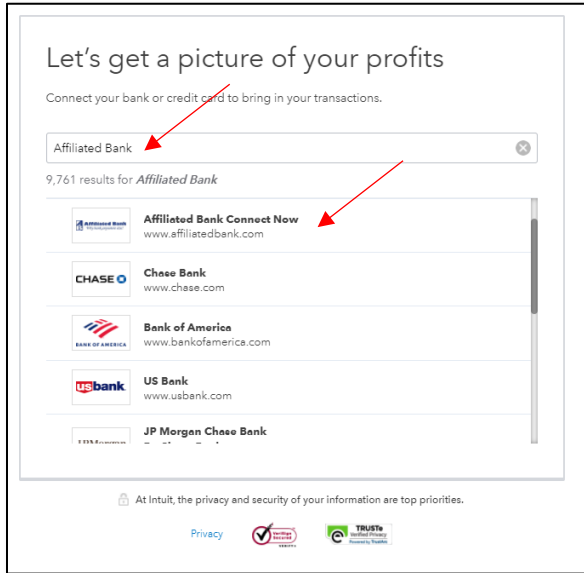
Before you begin using Direct Connect, we **STRONGLY** encourage you to run a full backup of your QuickBooks data in the event you need to restore everything back to where it started.

- To begin, login to QuickBooks online and go to **Connect Accounts** in the bank accounts section.

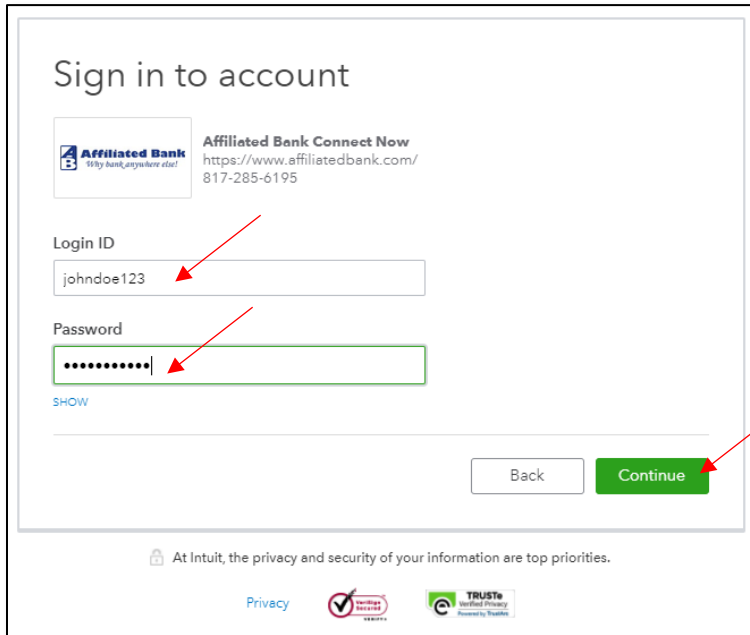


The screenshot displays the QuickBooks Online interface for Affiliated Bank. The left sidebar contains navigation options like Dashboard, Transactions, Expenses, Invoicing, Cash Flow, Projects, Payroll, Reports, Taxes, Mileage, Accounting, My Accountant, Apps, and Live Bookkeeping. The main content area features a 'SETUP GUIDE' with four steps: 'Start invoicing', 'See how much you're making', 'Connect with an accountant', and 'Add the finishing touches'. Below the guide is a 'CASH FLOW' chart titled 'Track how your money is doing', showing a bar chart of money in and out from December to November. On the right, the 'BANK ACCOUNTS' section shows two bank accounts with a balance of \$0 in QuickBooks. A red arrow points to the 'Connect accounts' link in this section. The 'INVOICES' section shows '\$0 Unpaid' and '\$0 Paid' with corresponding progress bars.

- Enter “**Affiliated Bank**” in the “**Enter your bank name or URL**” box.
- Select the **Affiliated Bank Connect Now** option.



- Enter your Business Online Banking login credentials.



- Next, “Link your accounts” will appear. This is where you will map your accounts in Business Online Banking to your accounts in QuickBooks. *It is very important you map the accounts correctly to avoid downloading data into the wrong account.*

Which accounts do you want to connect?

Savings Account *ount
Balance: \$60.96

Small Business Checking *king
Balance: \$247.57

Money Market Account *ount
Balance: \$0.50

Connect

Which accounts do you want to connect?

Savings Account *ount
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Balance: \$0.50

We will pull transactions from the selected accounts from 01/01/2020. Or you can select a different date to pull transactions from. Some bank limitations may apply.

Connect

You are now ready to pull transactions into QuickBooks. For next steps within QuickBooks and frequently asked questions visit the link below.

[QuickBooks: Next Steps and FAQ](#)

