

# QuickBooks Desktop – Web Connect

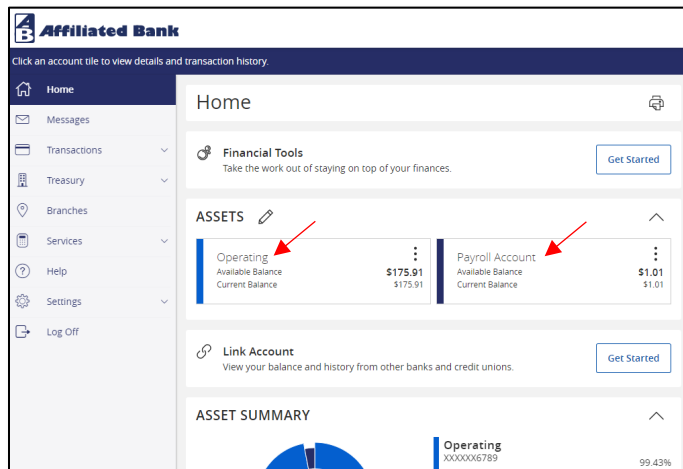
There are two ways to connect to Affiliated Bank using QuickBooks Desktop.

1. **Web Connect** is where you log in to **Business Online Banking** and then select the data range and account you want to export. You can then import the data into QuickBooks for reconciliation of transactions.
2. The second method is **Direct Connect** is where you log in directly from **QuickBooks into the Bank**. For more information on this method see the **Direct Connect for QuickBooks Quick Reference Guide**.

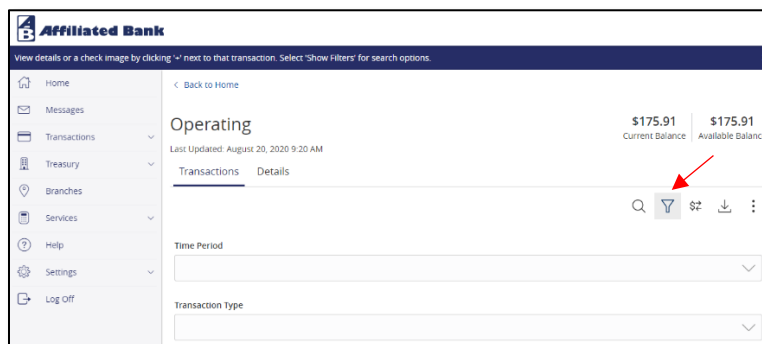
Before you begin using Web Connect, we **STRONGLY** encourage you to run a full backup of your QuickBooks data in the event you need to restore everything back to where it started.

To begin with **Web Connect** open QuickBooks.

- Login to your Affiliated Bank Connect Now™ Online Banking account through your preferred web browser and click on the account you wish to begin with.

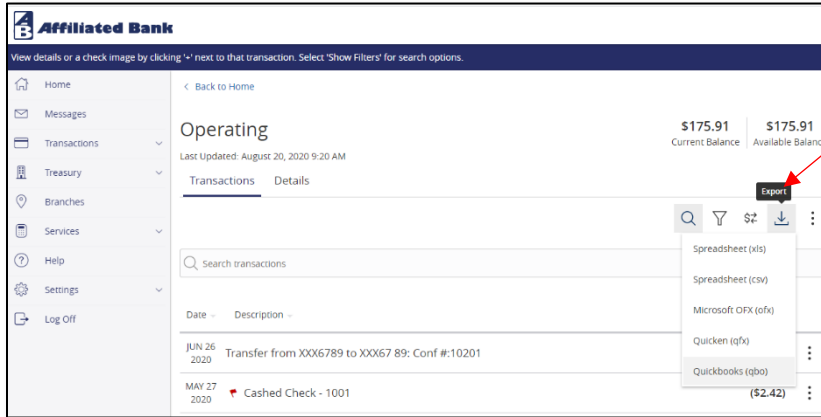


- Click on the **filter icon** located in the top, right portion of your screen.

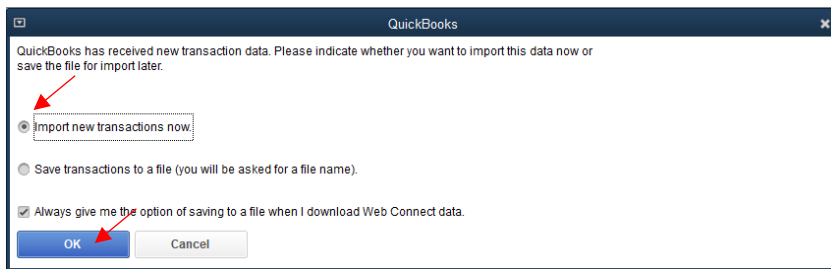


- Select the **time period** you wish to download.
- Next, select the transaction type you wish to download. We recommend **“Posted.”**
- Click **“Apply Filter.”**

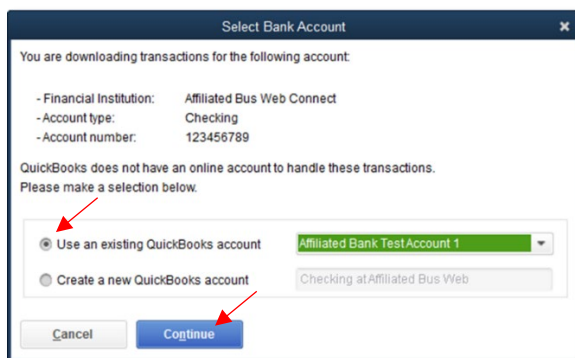
- Next, click the “Export” option.



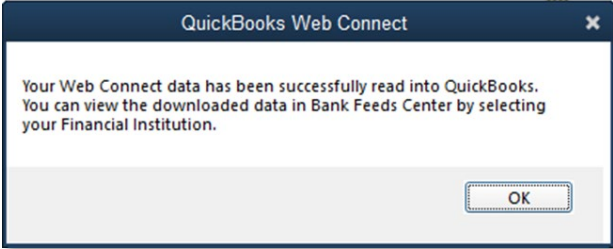
- Depending on the browser you are using, open the file that has been downloaded. In Google Chrome the file will appear at the bottom of your screen.
- Select the “Import new transactions now” option.
- Click “OK.”



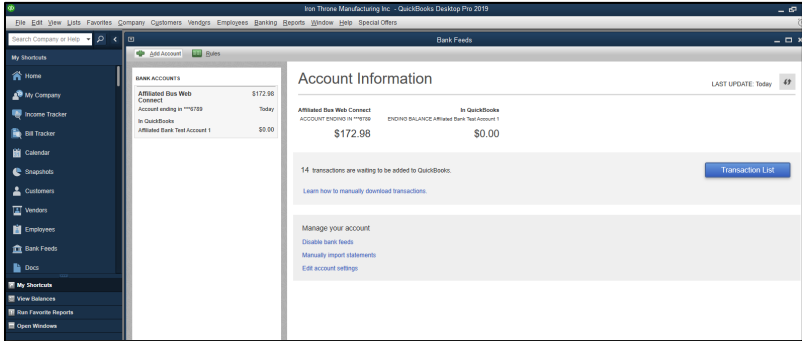
- When connecting your Affiliated Bank account to QuickBooks for the first time, you will see the window below.
- If you have setup your Affiliated Bank account in QuickBooks, then select the “Use an existing QuickBooks account” option.
- If you are setting up your Affiliated Bank account in QuickBooks while doing this, then select the “Create a new QuickBooks account” option and follow the prompts within QuickBooks.



- You should now receive the following message indicating your Web Connect file has been successfully read into QuickBooks.



- You are now ready to perform the reconciliation feature within QuickBooks.



For step by step instructions, please visit the QuickBooks Support website below and follow the recommended steps that QuickBooks has provided.

[QuickBooks Support Website](#)

