

QuickBooks Direct Connect Reference Guide

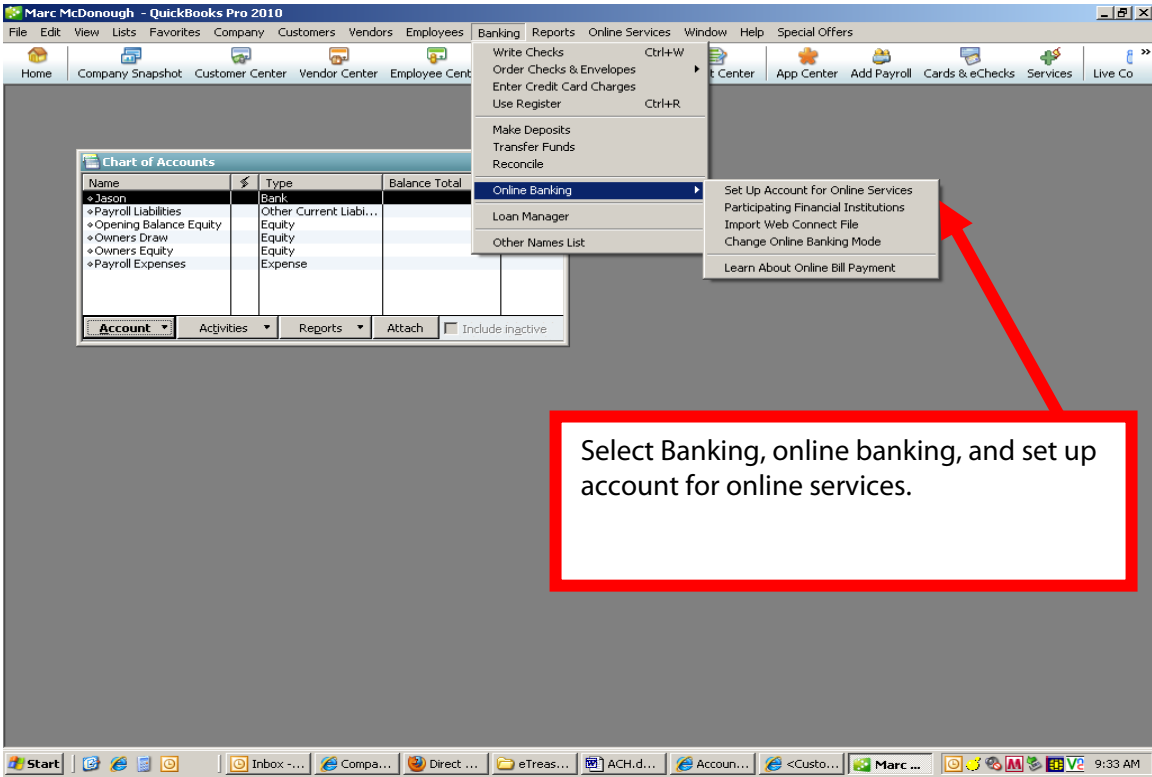
1 PRE-SETUP:

After you sign into your QuickBooks account you must disable your account(s) from any online connection prior to using direct connect for the first time to pull transaction information.

Go to **Lists** on the menu bar inside QuickBooks, select **Chart of Accounts**, right click on your account, and select **Edit**. Select the **Online** tab inside the window. Select **Deactivate All Online Services** (If you do not see the option to deactivate, then the account is currently not connected online and you can proceed with the instructions below). Once the steps above are done you can download transaction information to QuickBooks using your direct connect ID and password. You must have a direct connect ID prior to using the direct connect service with QuickBooks. This is provided to you by People's United Bank.

2 SETTING UP DIRECT CONNECT:

Select **Banking** on the menu bar inside QuickBooks, then select **Online Banking**, and then select **Set Up Account For Online Services**. **Be sure that you have your Direct Connect ID and Password**. Use the password (pin) provided by People's United Bank when it is required. You will be asked to change it.



3 ONGOING USE:

You will be prompted with ID and password fields each time you would like to pull transaction information via direct connect going forward. Enter in the bank provided ID and the password you have created into those fields and continue. The information from our eTreasury+ site should then pull over. Your QuickBooks system may save the direct connect ID for you, in which case, you will only have to enter the password to receive transaction information.