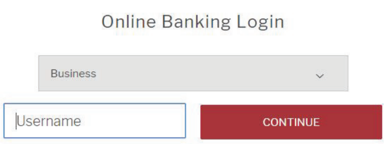
QuickBooks® Direct Connect - Online

In order to connect your bank account to QuickBooks®, you will need your online banking user ID and password to log into your bank account. *(Contact the bank ahead if you are using a fob token).*

Step 1: Locate Your Bank

From the QuickBooks® Banking Page, select Add Account on the top right side:
Type in **People's Bank of Commerce-Medford Business Banking** in the search. Select new connection or existing connection if you are adding an account.

Step 2: Log Into Your Bank Account



- You should see the People's Bank Online Banking login screen.
- Enter the user ID and password that you normally use to access your bank account.
- Depending on your internet connection and number of accounts that you have, it may take a few minutes for QuickBooks® to connect to People's Bank.

Step 3: Select Bank Accounts

You should see a screen that will list all the accounts you have at People's Bank.

Account Name: From the list of accounts, select the QuickBooks® account name you want to link to your account. Enter account type. If you have not set up the account in QuickBooks® yet, select **Add Account** from the drop down.

Step 4: Click Connect

Before you click the connect button, double check to make sure that you did not select any accounts that you **do not** want to keep track of in QuickBooks®. (i.e. **personal bank accounts**)

A WORD OF CAUTION: Once you click Connect all transactions will be downloaded into QuickBooks®. Unfortunately there is no automatic undo button. Later on if you find out that you accidentally selected an account that you do not want connected to QuickBooks® then you will need to manually delete all of those transactions before you can delete the account from QuickBooks®.

Click the **Connect** button in the far bottom right part of the screen. This will start the process of downloading transactions for the accounts you selected in step 3 into your QuickBooks® file.

Depending on the number of accounts you have selected and the date range, this could take a while to complete.

Step 5: Display Balance

After the transactions are downloaded into QuickBooks®, you will see the account name displaying Bank Balances and Quickbook® Balance.

Need help? Contact your branch of account and we will be happy to assist.

ASHLAND BRANCH	**BARNETT BRANCH**	**BIDDLE BRANCH**
541-665-5262	541-622-6222	541-776-5350
CENTRAL POINT BRANCH	**GRANTS PASS BRANCH**	**KLAMATH FALLS BRANCH**
541-665-5262	541-955-8005	541-273-2717

People's BANK
We put people first.

EQUAL HOUSING LENDER Member FDIC

www.peoplesbank.bank Revised 6/2018