

1. Select the **Lists** menu and select **Chart of Accounts**. The **Chart of Accounts** window opens.
2. Click on the **Account** button and click on **New** .
3. Select **Bank** and click the **Continue** button.
4. Enter the name you want to give the account (Operating, Payroll, etc), the Account Number and the Routing Number (064109329) and click on the **Save & Close** button.
5. Then, QuickBooks will ask you if you want to setup Online Services. Click on the **Yes** button.
6. Start typing in "**Franklin Synergy**" and select the "**Franklin Synergy Bank DC**" that comes up as an option.
7. Enter your Internet Banking UserID as your Customer ID and your Password twice. You may test that you have everything correct here by going to www.franklinsynergybank.com and make sure you login successfully with those same credentials. If you are sure they are correct, you can click on the Sign In button after entering the Customer ID and Password twice.
8. You will be returned a list of Accounts you have with Franklin Synergy Bank. Please select the account you are trying to connect and click on the **Next >** button.
9. This process may take some time, but at the end you will get a screen pop up saying "**Direct Connect Setup Complete**" and how many transactions were downloaded. Click the **Finish** button.
10. Click on the **Add Transactions to QuickBooks** button and select the Account to download these transactions to.
11. Then, it will ask you to match these transactions in QuickBooks. You can click on the **Add Multiple...** button to download them all into this QuickBooks account. Click on the **Add Selected** button to add these transactions.
12. Most all of your accounts will return 90 days worth of transactions.

Other Notes

- If you have any trouble with this process, you may call us at (615) 236-2963 or e-mail us at InternetBanking@franklinsynergy.com.