Activate Intuit Direct Connect

For security reasons, each new connection between an Intuit application (Quicken or QuickBooks) and the DirectConnect web service will need to be activated.

Activating a Connection

1. Login to your online banking website.
2. Go to Activate Connections under the User Settings menu.
3. Click the "Activate new Direct Connection" link

- Select a device location
- Click Create button

4. After the new connection is created, you have 15 minutes to establish the connection between the Intuit application and the DirectConnect web service. If no connection is established in 15 minutes, the connection will expire and a new connection will be required to be activated before the connection will be functional.
   i. This only has to be done once per Quicken/QuickBooks installation.

5. The connection name can be renamed at any time.
6. Only delete a connection if you are no longer using the connection.
    i. Delete the connection if you are no longer using the connection between the Intuit product and your online banking accounts.
    ii. If deleted, the connection would have to be established again for the DirectConnect to work properly.
7. Once the connection is established, the status and last used date and time will be displayed on the connection details page.

Connecting Quicken Accounts

1. For new accounts, after launching Quicken
   a. Go to Tools | Add Account…
   b. Select account type
   c. Enter your bank name and click on the name after it is displayed in the results section
   d. Enter your online banking user ID and Password
   e. Click the Connect button
   f. Quicken will use the connection that you created in Step 1 to connect and download the available account history transactions from all of your online banking enabled accounts.
2. For existing accounts previously using WebConnect, after launching Quicken
   i. Go to Tools | Account List
   ii. In the Transaction Download column, click on Improve Connection
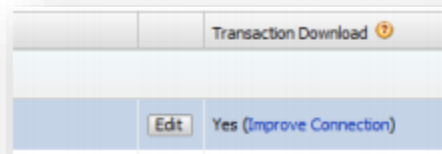
   - If the Improve Connection link doesn't appear, click on the Edit button and then the Online Services tab.
   - Click on the Click here to find out more and get set up.
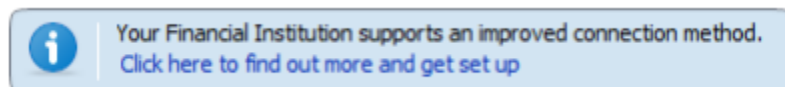
   iii. Enter your online banking User ID and Password
   iv. **Important:** Before you continue, make sure a connection has been created on your online banking site (see Step 1, Activating a Connection) and is waiting for the connection from Quicken.

      v.   Click the Connect button
     vi.   After the connection has been established, your list of accounts that are online banking enabled should be displayed in a list. You can modify any of the account types or nicknames.
    vii.   Click the Next button
   viii.   All of your accounts and transactions will be imported into Quicken
     ix.   To update your account transactions in the future, launch Quicken and click the One Step Update button

Connecting QuickBooks Accounts

Before you attempt to setup QuickBooks for DirectConnect, make sure you have completed the prior "Activating a Connection" steps. Make sure to update the QuickBooks application and the list of financial institutions. Go to the Help menu, Update QuickBooks and click the Update Now button.

1. Within the QuickBooks application, go to the Banking menu, Bank Feeds, Setup Bank Feed for and Account.
2. Click Continue
3. Enter your bank's name. If you see the bank name in the results box, click on the name of your bank.
   a. The Enroll in Direct Connect box should appear.
   b. Click Continue.
4. Enter your online banking User ID and Password. Click Connect.
5. Select each account you want to link. You can create a new QuickBooks account for each account or link to an existing account. If you create a new account, you will be required to name the new account.
6. Click Connect. The accounts should now be linked.
7. Go to the Banking menu, Bank Feeds.
8. Select an account and click on the Download Transactions.
9. You will be prompted to enter your online banking password. Enter your password and click the OK button.
10. To update all of your account transactions in the future, you can return to the Bank Feeds menu option and click the Refresh accounts button.