

The Basics of Direct Connect in Online Banking

What is it?

Direct Connect facilitates the direct download of data from within QuickBooks (in other words, the user goes to that software and initiates the download). It creates a two-way communication between Online Banking and the PFM.

Users of QuickBooks who prefer to work in the PFM over Online Banking are the best candidates for Direct Connect.

Basics Features of Direct Connect

- Get latest balances from Online Banking
- Import cleared transactions from Online Banking

How do you sign up?

In Online Banking, go to Additional Services and complete the short enrollment form.

Users with QuickBooks Online should not register since those products are NOT supported with Direct Connect.