

QuickBooks – MAC – Direct Connect

Direct Connect - Setup

Procedure

Task 1: Preparation

1. Back up your data file. For instructions to back up your data file, choose **Help** menu and use the Search bar available at the top. Search for **Back Up** and follow the instructions on screen. The first time you do a backup, QuickBooks will guide you through setting backup preferences.
2. Download the latest QuickBooks Update. For instructions to download an update, choose **Help menu** and use the Search bar available at the top. Search for **Update QuickBooks**, select **Check for QuickBooks Updates** and follow the instructions.

Task 2: Enrollment for Direct Connect Access

IMPORTANT: We have implemented enhanced security to help protect your information transmission via QuickBooks Direct Connect. If you are initiating your first Direct Connect connectivity, please contact the Concierge Desk at 888-322-2120 to request access to enable Direct Connect from Digital Banking.

1. Call the Concierge Desk at 888-322-2120
 - a. Request access to enable Direct Connect from Digital Banking
2. Proceed with the instructions below

Task 3: Setup Bank Feed to *SVB Private – Legacy BP Client*

1. Choose **Banking** menu > **Online Banking Setup**> Enter
2. Then select **SVB Private – Legacy BP Client** from the **Financial Institution** list. Click **Next**.
3. Follow the instructions in the wizard. If prompted for connectivity type, select **Direct Connect**.
4. The Online Banking Assistant window displays during setup. Select **Yes, my account has been activated for QuickBooks online services**, then click **Next**.
5. Enter credentials and click **Sign In**.
6. For each account you wish to download into QuickBooks, click Select an Account to connect to the appropriate existing account register.

IMPORTANT: Do **NOT** select “**New**” under the action column if the account is already setup on QuickBooks.

7. Click **Next**, then **Done**.
8. Add or match all downloaded transactions in the Downloaded Transactions window.

Task 4: Online Bill Payment

IMPORTANT: Online Bill Payment feature is only supported with Private Digital Banking - Personal Bill Pay. This feature is used to transmit bill payments and biller (payee) details to/from QuickBooks.

1. User must have bill pay enabled via their Private Digital Banking username
2. QuickBooks screen:
 - a. Navigate to the Lists> Chart of Accounts> review list of Accounts, and right click on the account that is enabled for bill pay on you Digital Banking profile.
 - b. Select, Edit Account
 - c. Go to, Bank Feed Settings (tab)
 - Online Bill Payments: Check box to enable transmission of bill payments.
 - Select: Save and Close
3. Financial Institution name updates to: ***SVB Private QBDC – Legacy BP***