

# QuickBooks – Windows – Direct Connect

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## Direct Connect - Setup

### Procedure

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#### Task 1: Preparation

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1. Back up your data file. For instructions to back up your data file, choose **Help menu > QuickBooks Help**. Search for **Back Up** and follow the instructions.
2. Download the latest QuickBooks update. For instructions to download an update, choose **Help menu > QuickBooks Help**. Search for **Update QuickBooks**, then select **Update QuickBooks** and follow the instructions.

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#### Task 2: Enrollment for Direct Connect Access

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**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

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#### Task 3: Setup Bank Feed for an Account

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1. Choose **Banking** menu > **Bank Feeds** > **Setup Bank Feed for an Account**.
2. Enter, then select **SVB Private – Legacy BP Client**. Click Next.
3. Please click on “Use Advanced Setup” link to select **Direct Connect**.
4. Enter your Digital Banking login credentials, and click **Connect**
5. Link your bank accounts with the existing QuickBooks accounts, or Add Account and click **Connect**.

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**Task 4:** Online Bill Payment

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**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
  - d. Financial Institution: ***SVB Private QBDC – Legacy BP***