

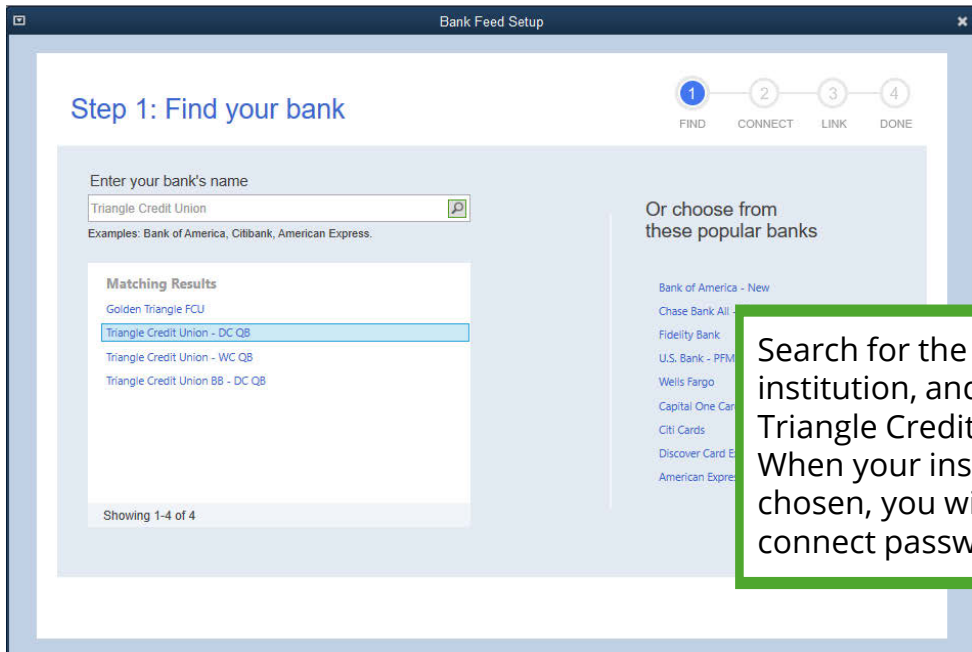
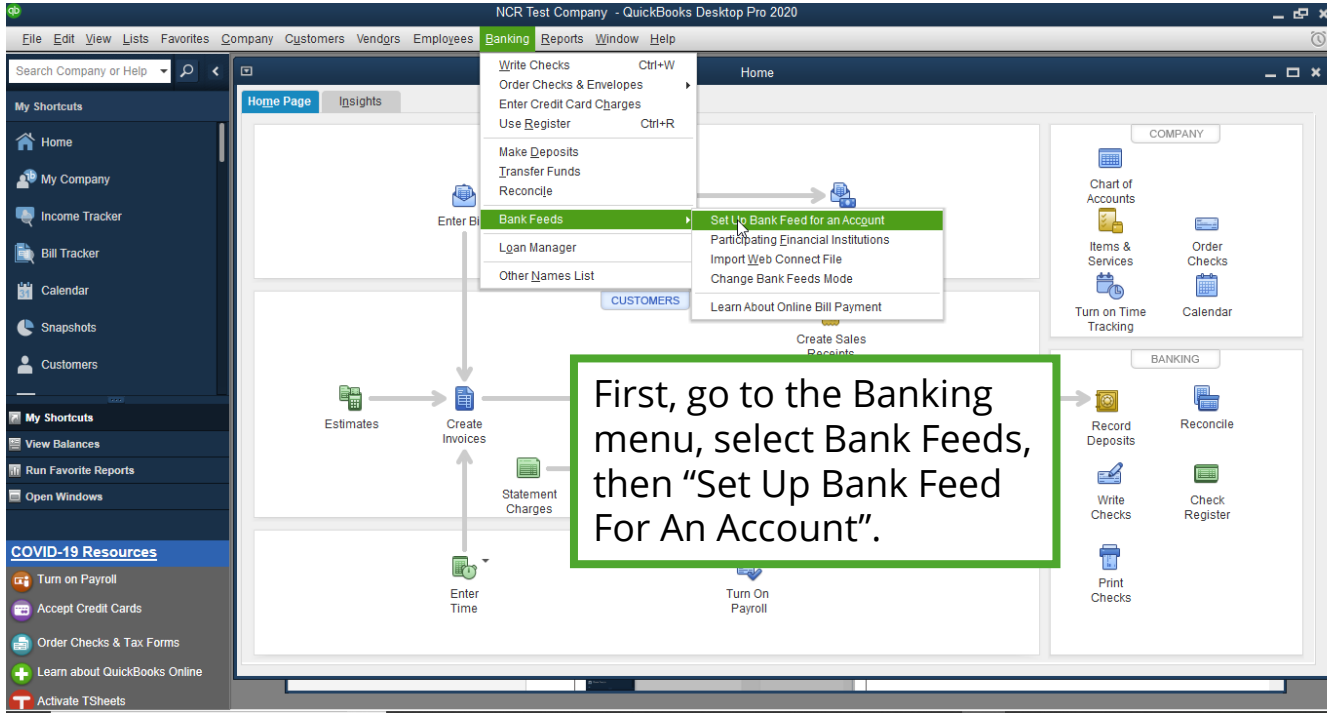
To register for Direct Connect, log into Consumer Banking and select "Connectivity for QuickBooks" in the Additional Services menu.

Only desktop versions of QuickBooks are supported; QuickBooks Online are NOT supported.

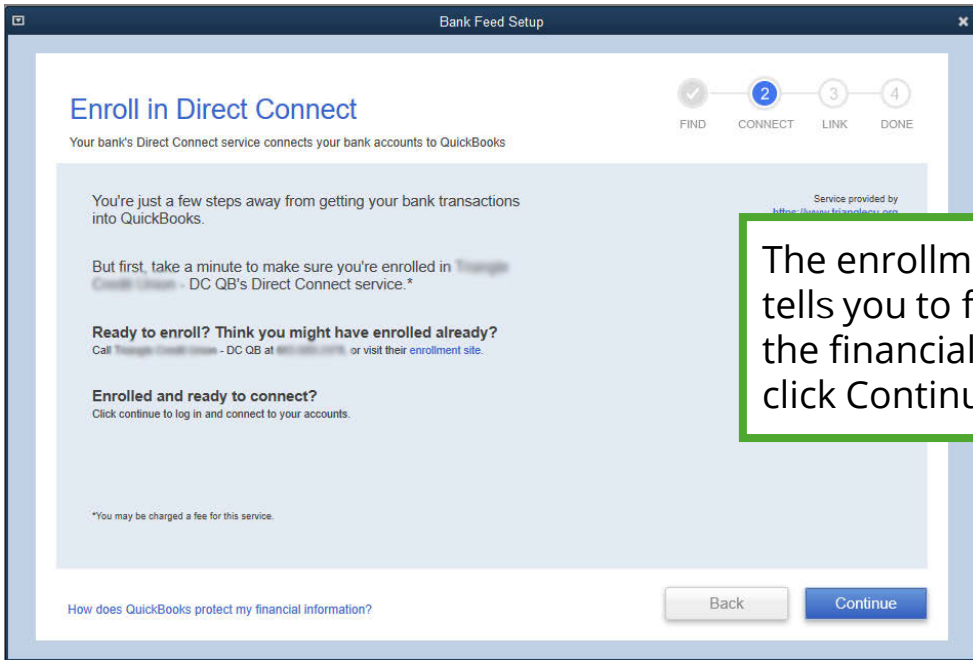
Note: All consumer users can enroll in Direct Connect, assuming it's enabled in the banking experience.

Upon clicking Submit, an email confirmation goes to you.

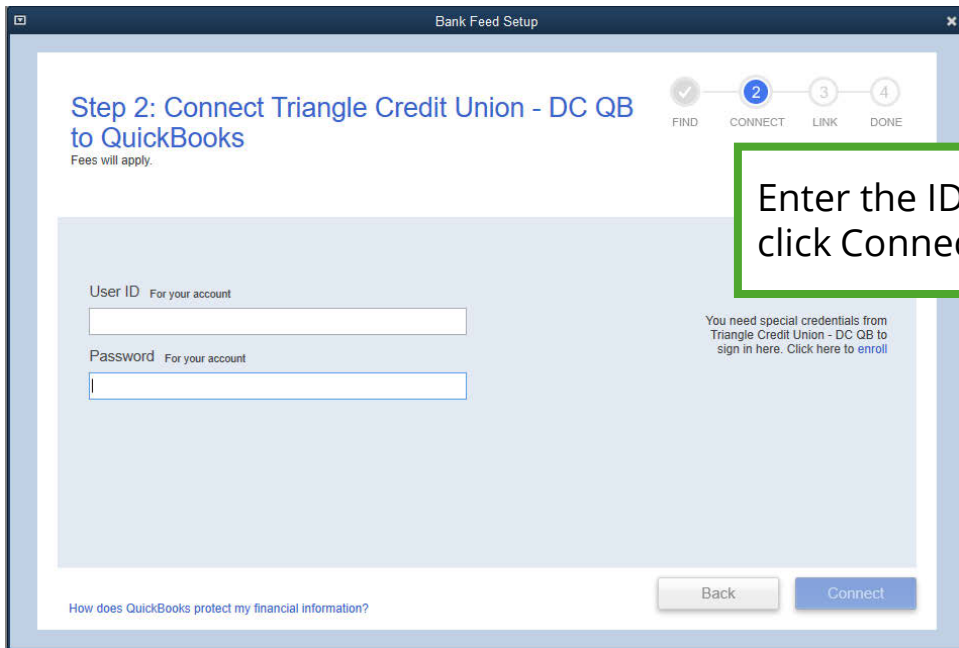
After completing the registration form in Consumer Banking, the business sets up Direct Connect in QuickBooks. Screenshots are from QuickBooks, which varies based on version.



Search for the financial institution, and select Triangle Credit Union-DC QB. When your institution is chosen, you will use the direct connect password.

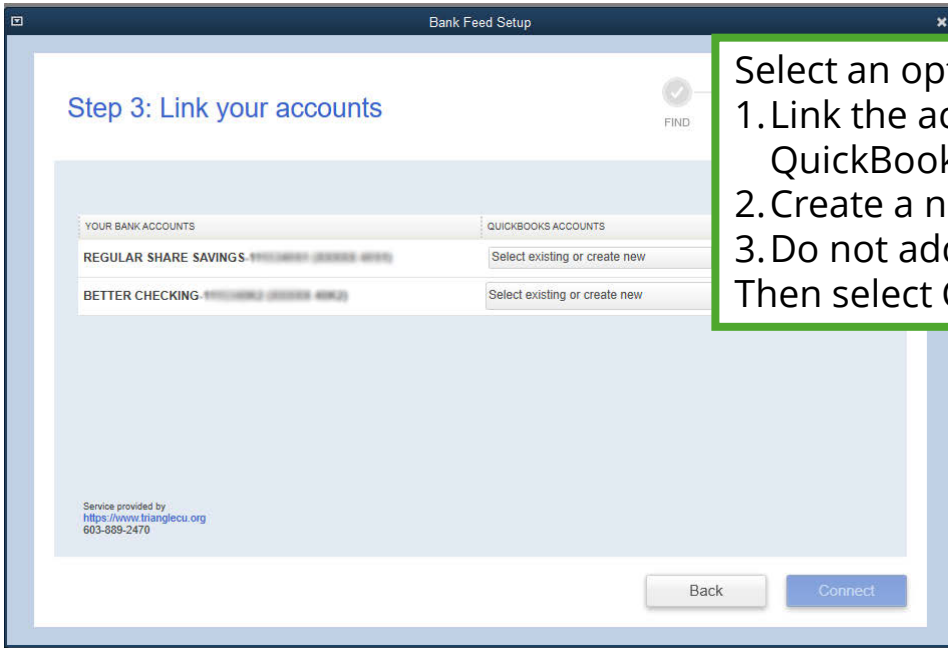


The enrollment instructions tells you to first enroll with the financial institution, then click Continue.



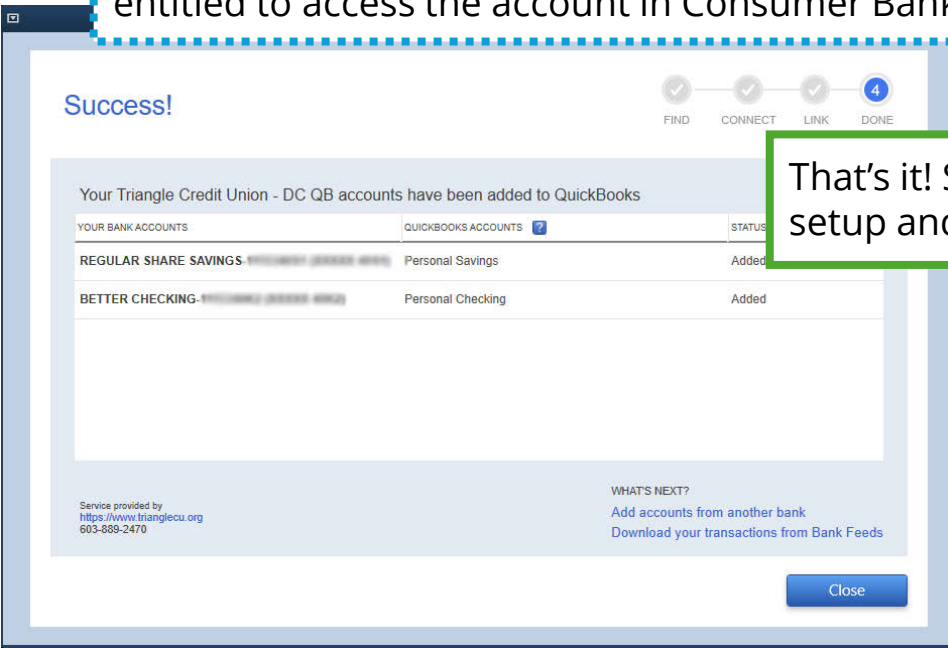
Enter the ID and PIN and click Connect.

NOTE: The "Customer ID" is the Consumer Banking username; the "PIN" is the Direct Connect password you created on the registration page in Consumer Banking.



Select an option for each account:
1. Link the account to an existing QuickBooks account.
2. Create a new account.
3. Do not add the account.
Then select Connect.

All the accounts from all TINs pull in as long as you are entitled to access the account in Consumer Banking.



That's it! Simply confirm the setup and select Close.