

QuickBooks® Direct Connect - User Guide

QuickBooks® version 2017

How to Sign Up

- If you would like to sign up for the QuickBooks Direct Connect service, please visit your local branch and a Customer Service Representative will assist you with the setup. Alternatively, you may reach out to your Cash Management Sales representative for more details.

Before you get started

- Once you have received confirmation that you have been successful setup for QuickBooks Direct Connect in BOSS, you will want to obtain your QuickBooks log in credentials. Your credentials contain a system generated ID and you will use your existing BOSS password. To begin using Direct Connect, first follow these steps within BOSS:
 - o To obtain your Direct Connect User ID you will need to login to BOSS and access the 'Administration and Settings' tab. Next you will need to click on 'User Maintenance' and then click on 'View' next to your user name. Your Direct Connect ID will be found in the User profile page under 'OFX Direct Connect ID'.
 - o Note: The password you will use for Direct Connect is the same password you are currently using for BOSS.

The screenshot shows the 'User Maintenance' page in BOSS. At the top, there is a dark blue header with a back arrow and the text 'User Maintenance'. Below this, the user 'INTUITQBO' is selected. The page has three tabs: 'User Profile' (which is highlighted with a blue box), 'Reporting', and 'Admin'. Under the 'User Profile' tab, there is a section titled 'User Information' with the following details: 'User ID : INTUITQBO', 'User Name : INTUITQBO', 'Company : 00000001', and 'Status : Approved'. At the bottom of the page, there is a box titled 'Admin Settings' containing the text 'OFX Direct Connect ID : 00000001INTUITQBO'. A blue arrow points to this box from the right.

Getting Started in QuickBooks

- From the QuickBooks home screen, click the **Connect an Account** button on the right. Search by bank name - Fulton Financial Bank BOSS.

The screenshot shows the QuickBooks home interface. On the right side, under the 'Bank accounts' section, the 'Connect an account' button is highlighted with a red box and a red arrow pointing to it. The main dashboard displays financial summaries for 'Income', 'Expenses', and 'Profit and Loss', all showing \$0. The 'Income' section includes a bar chart for 'OPEN INVOICES', 'OVERDUE', and 'PAID LAST 30 DAYS'. The 'Expenses' section includes a donut chart for 'LAST 30 DAYS' categorized into five categories. The 'Profit and Loss' section shows a bar chart for 'NET INCOME'. The right sidebar contains a 'Needs attention' section with various notifications and a 'You personalized QuickBooks' message.

- Select **Banking** on the sub menu. This will take you to the Bank log in screen.

The screenshot shows the 'Import transactions from your bank or credit card' screen. A red arrow points to the search input field where the user can enter their bank URL. Below the search field, there is a section titled 'Or choose from these popular banks' with a grid of bank logos including 'YourBank', 'Bank of America', 'CHASE', 'JPMorganChase', 'PayPal', 'US bank', 'SUNTRUST', 'Capital One', and 'PNC'. To the right, there is a 'Why do this?' section with a list of benefits and a donut chart showing a total of \$91 in meals, broken down into \$272 Payroll, \$457 Gas, and \$91 Meals.

Log In with your Direct Connect credentials

- Enter in the BOSS OFX Direct Connect ID and password.
- Note: Your password will be the same as what you use in BOSS.

Welcome to QuickBooks, Joel ✕



User ID
for your Chase Bank account

Password
for your Chase Bank account

Choose Account(s) to Add to QuickBooks

- On the left of the Connection Screen, below the heading labeled Account Name, you'll see a list of all the accounts you have with Fulton Bank (e.g. Checking, Savings, etc.).

Add an account ✕

Select the accounts you want to connect.



1. Choose an account type for each account you're connecting
2. Click **Connect** to download up to 90 days of transactions. [Need a shorter date range?](#)

	ACCOUNT NAME	QUICKBOOKS ACCOUNT	BALANCE
<input type="checkbox"/>	TOTAL CHECKING	<input type="text" value="Enter Text"/> ▾	2,386.20

- Check the box next to the account(s) you would like to have connected to QuickBooks

Add an account ✕

Select the accounts you want to connect.



1. Choose an account type for each account you're connecting
2. Click **Connect** to download up to 90 days of transactions. [Need a shorter date range?](#)

	ACCOUNT NAME	QUICKBOOKS ACCOUNT	BALANCE
<input checked="" type="checkbox"/>	TOTAL CHECKING	<input type="text" value="Enter Text"/> ▾	2,386.20

Name Account(s) for QuickBooks

- In the middle of the Connection Screen, below the heading labeled QuickBooks Account, you'll see an Enter Text box with a drop-down suggestions menu tab. choose an appropriate account name for the list of options available.

Add an account ✕

Select the accounts you want to connect.

YourBank

1. Choose an account type for each account you're connecting
 2. Click **Connect** to download up to 90 days of transactions. [Need a shorter date range?](#)

	ACCOUNT NAME	QUICKBOOKS ACCOUNT	BALANCE
<input checked="" type="checkbox"/>	TOTAL CHECKING	<input type="text" value="Enter Text"/> <ul style="list-style-type: none"> Checking Bank Money Uncategorized Asset/Other Current Assets Undeposited Funds Other Current Assets Bank Loan Long Term Liabilities 	2,372.96

Connect

Connect Account to QuickBooks

- Once you have selected and saved all your account details, click **Connect**. After a few moments, you will see the message "We successfully downloaded your transactions." At the bottom of the screen, click I'm done. You will now be able to retrieve your transaction history in QuickBooks.

Add an account ✕

Select the accounts you want to connect.

YourBank

1. Choose an account type for each account you're connecting
 2. Click **Connect** to download up to 90 days of transactions. [Need a shorter date range?](#)

	ACCOUNT NAME	QUICKBOOKS ACCOUNT	BALANCE
<input checked="" type="checkbox"/>	TOTAL CHECKING	Checking	2,386.20

Connect

For technical support regarding QuickBooks Direct Connect, please call E-Commerce Services at 1.888.654.3858.

If you are looking for assistance with setting up Quicken® Direct Connect, instructions and videos can be found at:

<https://www.quicken.com/support/how-quicken-connects-your-bank>