QuickBooks Desktop Direct Connect

INSTALLATION GUIDE

QuickBooks Desktop Direct Connect Instructions

For current QuickBooks users with Web Connect (File Imports from online banking)

1. Backup QuickBooks Windows Data File & Update.
   - Choose **File > Back Up Company > Create Local Backup**
   - Download the latest QuickBooks Update. **Go to Help > Update QuickBooks Desktop.**
2. Complete a final transaction **i**mport and match downloaded transactions.
   - Complete one last transaction update before the change to get all of your transaction history up to date.
   - Accept all new transactions into the appropriate registers. (required)

For new Direct Connect or new Dime Direct Connect Customers:

1. *Backup QuickBooks Windows Data File using the instructions above.*
2. Deactivate any current online banking connection for accounts connected to financial institution that is requesting this change.
   - Choose **Lists** menu > **Chart of Accounts**.
   - **Right-click** on the first account you would like to deactivate and choose **Edit Account**.
   - Click the **Bank Feeds Settings** tab in the Edit Account window.
   - Select **Deactivate All Online Services** and click **Save & Close**.
   - Click **OK** for any alerts of messages that may appear with the deactivation.
   - Repeat steps for any additional accounts that apply.
3. Reconnect Online Banking connection for accounts that apply.
   - Choose **Lists** menu > **Chart of Accounts.**
   - **Right-click** on an account you would like to activate and choose **Edit Account.**
   - Select **Set Up Bank Feeds** on the bottom of the popup screen and select **Yes** in the dialog box that will appear.
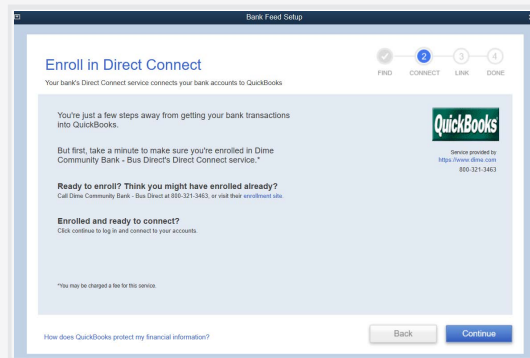
![DIME logo]

- Enter your institution's name in the search field and select **Continue**.
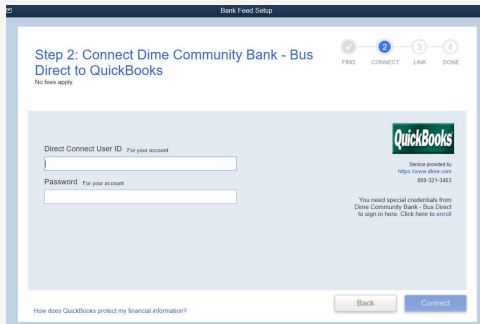- Double click on **Dime Community Bank Bus Direct.**
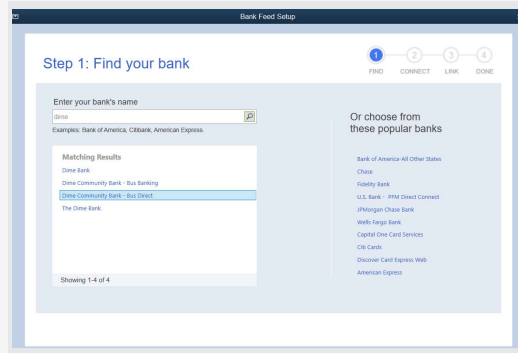
- At the Enroll in Direct Connect screen, click **Continue**.

- Enter your Direct Connect credentials. The Direct Connect User ID is provided to you by Dime. In the password section, enter your online banking password used for your online banking credentials.

WINDOWS SETUP

- Upon the first login, the system will produce an error message indicating that your profile needs to be approved in the online banking system.
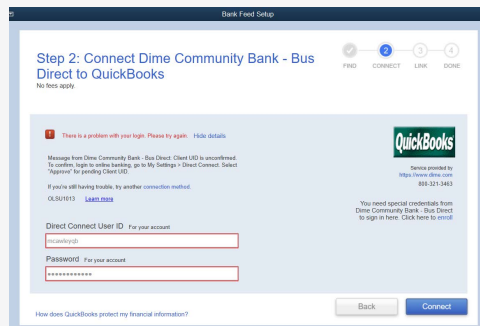

- To enable the service, login to online banking, go to your My Settings, Direct Connect, and click **Approve** in the **Client UID section**. If you are unable to access the Client UID, please contact the support team at **tmsupport@dime.com.**

Client UID

|	Client UID	Date Approved	Last Accessed Date	Date Created	Approve
✖	8bd07dd0c8bbebde7f3f8a506faf2c1f		11/30/2021	11/30/2021	Approve
✖	6600f7c755c50c1b74f760165995ae20	11/29/2021	11/29/2021	11/29/2021	

- Once approved, return to the bank feed setup. Select Dime Community Bank-Bus and re-enter the credentials from Step 2.
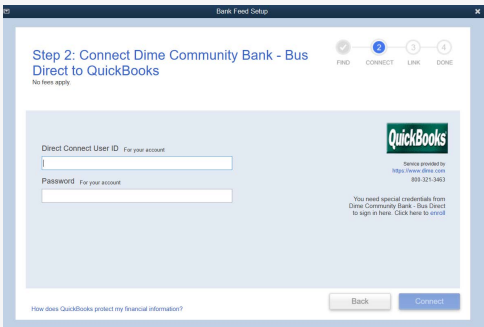
- The system will present the accounts to be linked. Ensure you associate the accounts to the appropriate accounts already listed in QuickBooks. Link to your existing accounts in the drop-down options labeled **Select Existing** or **Create New**.
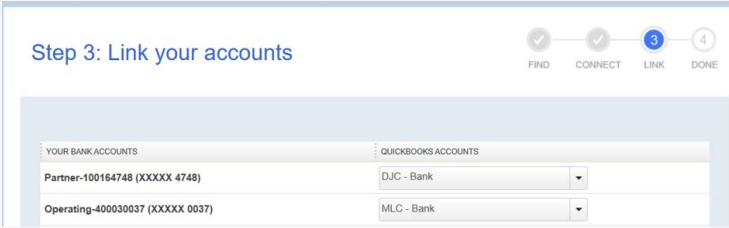
Important: Do NOT select "Create New Account" unless you intend to add a new account to QuickBooks. If you are presented with accounts you do not want to track in this data file, choose **Do Not Add to QuickBooks.**

- After all accounts have been matched, click **Connect** and then click **Close.**