

# QuickBooks Desktop Direct Connect

**INSTALLATION GUIDE** 





## **QuickBooks Desktop Direct Connect Instructions**

#### WINDOWS SETUP

### 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 import 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.



#### WINDOWS SETUP

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

Step 1: Find your bank	FIND CONNECT LINK DO
Enter your bank's name	
dime	Or choose from
Examples: Bank of America, Citibank, American Express.	these popular banks
Dine Community Bank - Ban Banking [Dine Community Bank - Bug Dinest The Onne Bank	Riddity Bank U.S. Bank - MPM Dovert Connect UMongan Chare Bank Werk Frages Bank Capital One Card Services Chi Cardis
Showing 1-4 of 4	Discover Card Express Web American Express

• 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.

Bank Feed Setup	
Step 2: Connect Dime Community Bank - Bus Direct to QuickBooks	PHD CONNECT LINK DONE
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Yow does QuickBooks protect my financial information?	Back Connect

• 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**.

nt U	ID				
	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	





#### WINDOWS SETUP

• Once approved, return to the bank feed setup. Select Dime Community Bank-Bus and re-enter the credentials from Step 2.

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	2: Connect Dime Community Bank - Bus at to QuickBooks	S PHD CONNECT LINK DONE
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How does	QuickBooks protect my financial information?	Back Connect

• 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**.