

Help Card: How to Connect Accounts to Quickbooks Using DirectConnect

The following information outlines how to connect your accounts to Quickbooks using DirectConnect.

Please note: DirectConnect supports Quickbooks Desktop and Quicken. Direct Connect does not support Quickbooks Online.

Connecting your account to Quickbooks

- 1. Login to your Quickbooks® product using your Quickbooks login credentials
- 2. Click on Bank Feeds in the Navigation menu
- 3. Select Regions Bank
- 4. On the enrollment screen, you will be prompted to enroll in DirectConnect, and then click **Continue**
- 5. Enter your Regions OFX Credentials
 - Contact your Regions OnePass Administrator to retrieve your OFX Customer ID
 - Your PIN is the same as the password you use for OnePass
- 6. Click Connect

YOUR BANK ACCOUNTS	QUICKBOOKS ACCOUNTS		
ACL\$ 7001F-400-000000007000251152 (XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Select existing or create new	-	
BluegrassLoan2-3780000791-0000828616 (XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Select existing or create new	-	
LeoEvans Loan2-6037880781-0001409986 (XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Select existing or create new	-	
Curtailment003-2580133184-0001340371 (XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Select existing or create new	-	
YQONOEAVYJ XEU-3960044114-0000586644 (XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Select existing or create new	-	
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- 7. Once logged in, select the accounts you want connected to Quickbooks
- 8. After accounts have been added successfully, click **Close**, and your processed transactions will begin loading into Quickbooks

Questions?

If you have questions, please contact <u>Melissa.Mack@regions.com</u> or <u>Connie.Payne@regions.com</u>.

