Quickbooks® Direct Connect Enrollment Instructions for New Customers

Introduction

Use these instructions if you are connecting Quickbooks and a new GRBonline account for the first time.

Documentation and Procedures

1. Login to Quickbooks.
2. At the top, go to **Banking**>**Bank Feeds**>**Setup Bank** Feed for an Account
3. Say **Yes** to the message box that displays "All open Quickbooks windows will be closed temporarily to set up Bank Feeds services. Do you want to continue?"
4. Enter "**Genesee Regional Bank**" in the Find Your Bank search box.
5. Select "**Genesee Regional Bank-DC**" (for Direct Connect)
6. Enter your **GRBonline ID** and GRBonline **Password**.
7. Your accounts from online banking will display. Use the drop down to associate the account from GRBonline to the corresponding account in Quickbooks or create a new account if a corresponding account has not been created in Quickbooks yet.
8. If you would like to use the bill pay feature, go to **Chart of Accounts**, right click on the account. Click **Edit Account**. Go to **Bank Feed Settings**. Check Online Bill Payments box. Click **Save and Close**.
9. Once connected, all banking functions can be completed through the Banking menu by going to **Banking**>**Bank Feeds**>**Bank Feeds Center**. From there you can download transactions or create new bill payments* or transfers for each account setup with Direct Connect.

You must be enrolled in bill pay on GRBonline to use this feature.

Additional Information:

Direct Connect is not officially supported for Quickbooks Online. Contact Intuit® for any support related questions regarding Quickbooks Online.

You must be using one of the three latest versions of Quickbooks to use Direct Connect.