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**
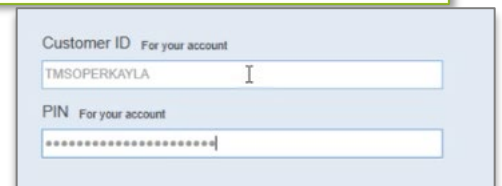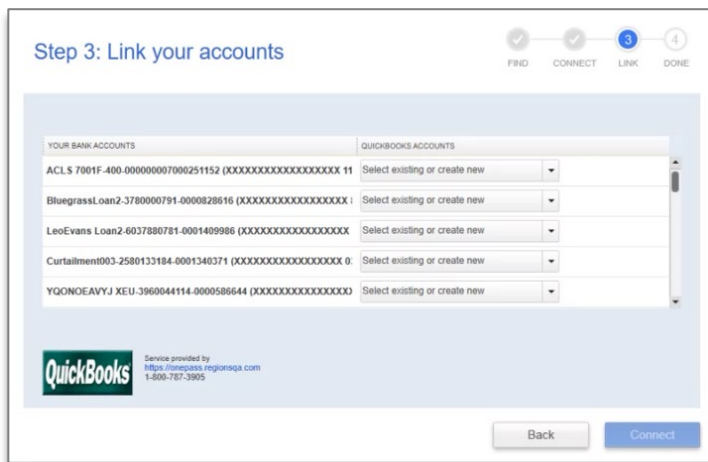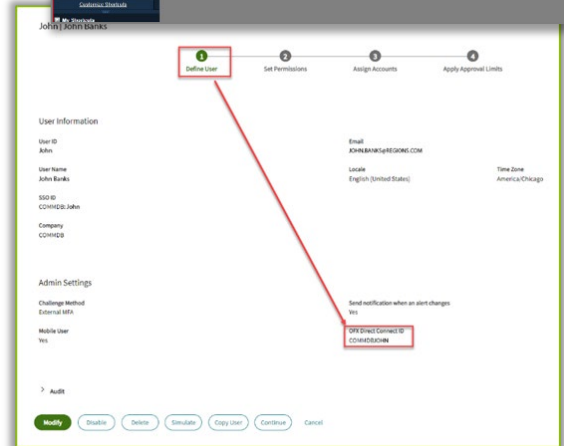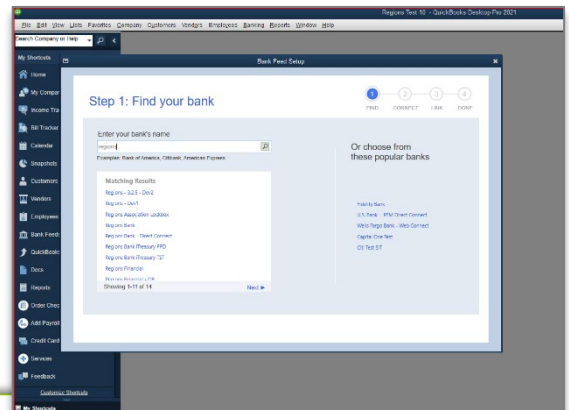
7. Once logged in, select the accounts you want connected to Quickbooks

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 Melissa.Mack@regions.com or Connie.Payne@regions.com.